HelpMatics™

Service Management System

HelpMatics™ ServiceDesk

User Manual

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Overview of HelpMatics™

1.1 Introduction

HelpMatics™ is a service management system for the IT helpdesk and other service departments. This tool helps companies to efficiently organize incident and problem management and the associated support workflow.

In addition to ticket processing, HelpMatics™ offers many other functions such as documentation, information management and online reporting. Further features are its multi-client capability and the support of QM processes by an integrated knowledge management.

The special advantage of HelpMatics™ is its intuitive handling in any workflow, ergonomic frontends, equal structure in all modules, comparatively easy implementation and administration, optimal transparency and continuous traceability in the support.

Our main objective during development was and is to combine maximum functionality with minimum operating effort. Many advantages will only manifest themselves during the daily work with HelpMatics™, which is confirmed again and again by our customers.

This documentation will acquaint you step by step with the use of HelpMatics™.

We hope that you will work efficiently with HelpMatics™.

1.2 Overview of features

The following overview shows you the services and functions offered by HelpMatics™ ServiceDesk and HelpMatics™ Knowledge:

- **Incident Management**
  Prioritization, categorization, status, deadline monitoring, creation of histories, creation of ticket templates for standard tickets, automatic transfer of e-mails into tickets etc. ensure effective and fast processing.
- **Problem Management**
  Option of opening problem tickets, separate problem reporting.
- **Resource management**
  User and configuration item and/or config. item management (user, hardware, software, documentation, service). Supports the import from or connection to existing systems.
- **Workflow Management**
  Forwarding, group and processing management, option of integrating Notes Mail or MS Exchange possible.
- **Escalation management**
  Escalates according to the underlying SLA (Service Level Agreement); in addition, warning levels can be individually configured as specified by the underlying SLA
- **Knowledge Management**
  Easy generation and use of an integrated knowledge base
- **Information Management**
  Central distribution of information, e.g. for changes, info display with the latest messages
- **Multi-client capability**
  Definition of clients for companies, locations, departments with individual SLA's, client-specific ticket processing and reporting
- **Web front-end**
  Ticket input screen for the Web and HelpMatics™ operation via a Web browser, e.g. for on-site support team members
- **Languages**
  Available in different language versions; easily expandable to any languages you like
- **HelpMatics™ CMS**
  HelpMatics™ CMS offers enhanced functions regarding Configuration Management according to ITIL. These features are described in a separate documentation. They are referred to at the respective points of this documentation.
- **Enterprise functionality**
  Special versions support global support structures by the option of specifying the availability of tickets, master data, SLAs, etc.

1.3 HelpMatics™ standard and SMB version

HelpMatics™ is available in a standard version and in an SMB version with limited features.

The limitations of the SMB version are described in a separate document.

1.4 Using HelpMatics™ Enterprise

HelpMatics™ has been designed for global support of several sites and distributed teams.

This permits a differentiation in the replication of tickets, configurations and their effective control over various support areas.

The standard version making use of the Enterprise setup is recommended for decentralized support at companies with several sites.

Instructions applying only to the use of the Enterprise features are highlighted in this manual as follows:

ENTERPRISE:

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1.5 HelpMatics™ CMS Enterprise

HelpMatics™ CMS Enterprise, a Configuration Management System of the HelpMatics™ Suite, uses a relational database managment system (RDBMS) for data storage.

The features that are exclusively available in HelpMatics™ CMS Enterprise are marked as follows:

HELPMATICS™ CMS ENTERPRISE:

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2 Main view and navigation

2.1 Navigator

The Navigator permits the navigation within the Service Management System. Depending on the selected level, further information and selection fields will be displayed. You navigate by mouse-click.

In addition to a possible selection on the Navigator, the desired information is displayed in the Viewer.

The Navigator may also be displayed differently, depending on the rights assigned.

Fig. 1: The Navigator

2.2 Viewer

The viewer represents the main window on the right where the information selected via the navigator is displayed.

By clicking the column titles you can change the sorting order.

By double-clicking a line you can edit information and change it depending on the type of information.

The figure below displays the list of users including the respective sub-documents of the configuration item (to be identified by the green arrow icon pointing to the bottom). If the arrow points to the right , the sub-categories are not displayed; you can display them by clicking the arrow. Via View > Expand/Collapse > Expand all orCollapse all / View > Expand/Collapse > Expand all/Collapse all you can display and hide the sub-documents of all entries, respectively.

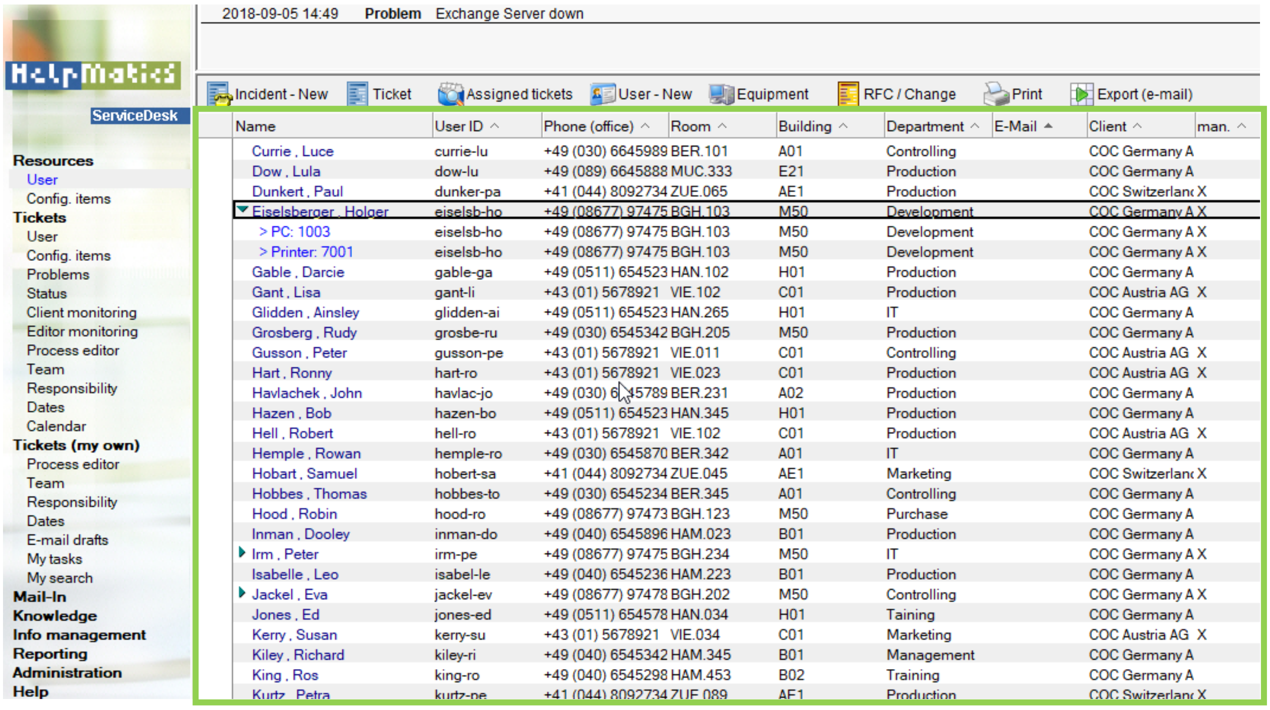
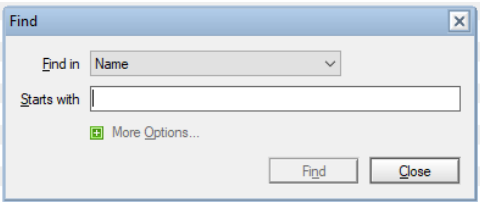


Figure 2 The viewer

> Note:
> In the man. column on the right of the Viewer the manually created users and/or config. items are marked. If the mark is missing, the data have been imported.

Moreover, you can sort the data in the Viewer by columns in ascending or descending order by clicking the black triangle in the column title. Quick search: This convenient standard feature of HCL Notes allows you to quickly navigate to the requested data:

If, e.g., you want to create a ticket for a user, simply enter the user's name or initial letters via the keyboard. This automatically opens a window:



By clicking OK, the user searched for will be highlighted and you can create the ticket.

Please note: The quick search is always performed in the first sorted column. In the case of categorized views, this is the first category level.

2.3 Action bar

Depending on the view selected in the navigator and the level of rights, you see different buttons on the action bar. You open a ticket in the list view via double-click.

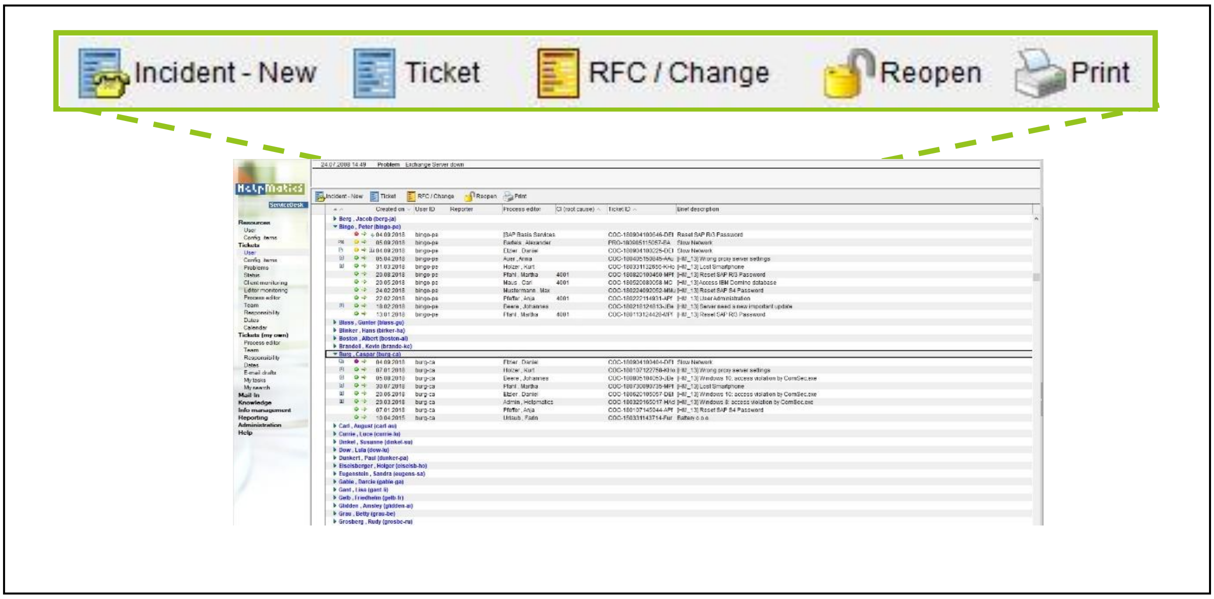
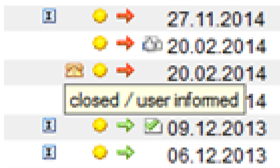


Fig. 3: Action bar

2.4 Icons in the views

Icons play an important role in the views of HelpMatics™ since they display information in a compressed way. In order to work efficiently with HelpMatics™, you should first memorize the mostly self-explaining icons.

When you hover over an icon a brief explanation appears. The following tables explain the icons used as well as their meaning.



2.4.1 Priority

The priorities are transferred according to the settings under ADMINISTRATION > CLIENTS > DEFINITION.

	Icon	Meaning
Priority 1		Suggestion: asap
Priority 2		Suggestion: very high
Priority 3		Suggestion: high
Priority 4		Suggestion: Standard
Priority 5		Suggestion: low

2.4.2 Forwarding and returning tickets

Forward	Icon	Meaning
Workflow > Process editor Workflow > Process team		forward to process editor or process team
Workflow > Back to resp. person/team		closed / user informed
Workflow > Back to resp. person/team		closed / user not informed
Workflow > Back to resp. person/team		further processing required
Workflow > Back to resp. person/team		incorrect ticket assignment

2.4.3 Automatic mail processing

Action	Icon	Meaning
Mail from Mail-In automatically attached to the ticket		E-mail attached to the ticket and process editor informed, if required.

2.4.4 Status

Status	Icon	Color
closed		green
work in progress		yellow
open		red
on hold		violet
assigned external		blue
scheduled ticket		grey

2.4.5 Date

Date	Icon
phone: e.g. call-back date	
fax / mail: response by fax or e-mail	
on site: e.g. appointment with user	
reminder	

2.4.6 Ticket type

Icon	Meaning
	master ticket or master info
	sub-ticket
	problem ticket
	Incident ticket
	Service requests are displayed without an icon.

3 Resource management

HELPMATICS™ CMS ENTERPRISE:

If you are using HelpMatics™ CMS, please refer to the HelpMatics™ CMS documentation for resource management.

3.1 User

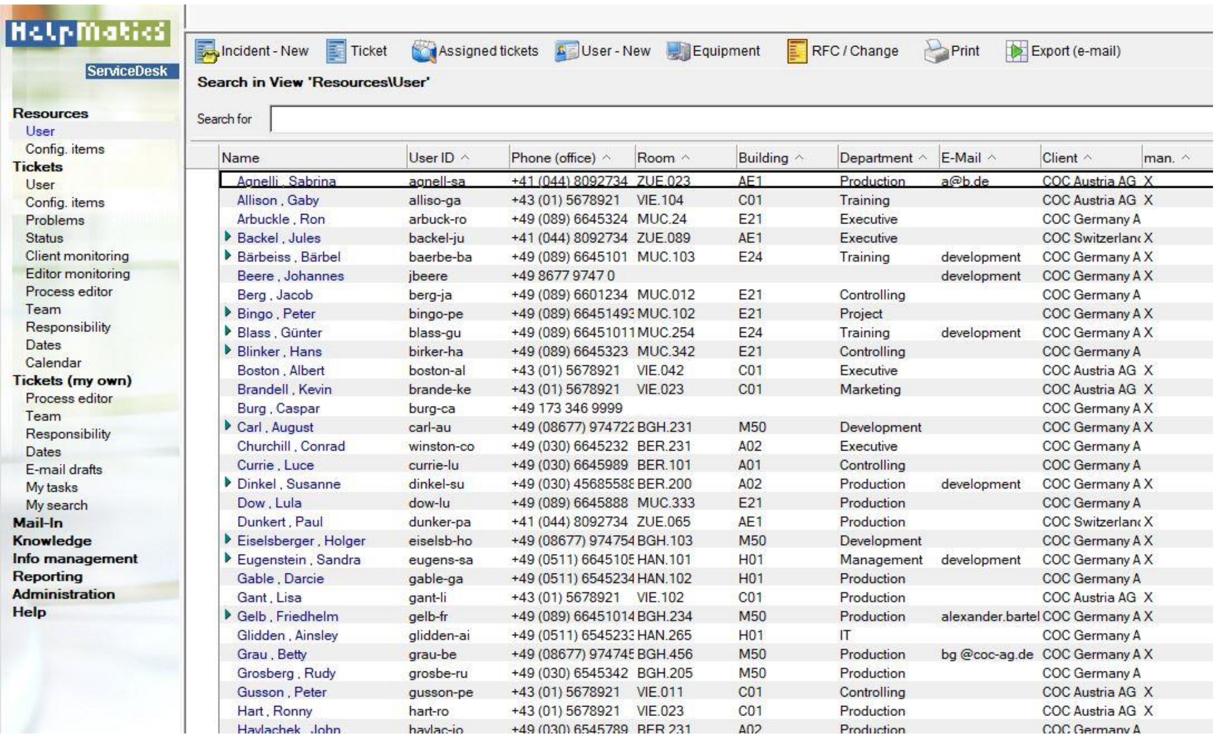
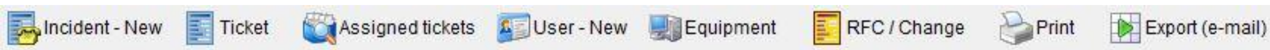


Fig. 4: Navigator and Resources > User view

In the Navigator you can see the User navigation item below the RESOURCES category. By clicking USER the corresponding view will be displayed in the Viewer.

This view displays all users supported by the helpdesk, sorted by the users' last names.
The green triangle symbolizes that a configuration item is assigned to this user.

Via the buttons of the action bar available in this view you can perform various actions.



- Double-click to open a user in the list.
- In order to create a new ticket for a certain user in this list, select the user in the view and then click the INCIDENT – NEW button.
- The ASSIGNED TICKETS button displays the tickets existing for a selected user in a separate window. By double-clicking a ticket, you can directly go to the ticket.
- With the USER - NEW button you can create a new user.

  A new window opens, in which you can enter the user data.

1. Enter the necessary data.
2. If you want to use a specific priority for each ticket created for a user, set the specified priority to “Y” and select the desired priority via the button. This setting will be inherited to all assigned configuration items.
3. In the Company tab you have to assign a client to the user and can then enter further company-specific data.
4. Subsequently, click the Save and Close buttons.

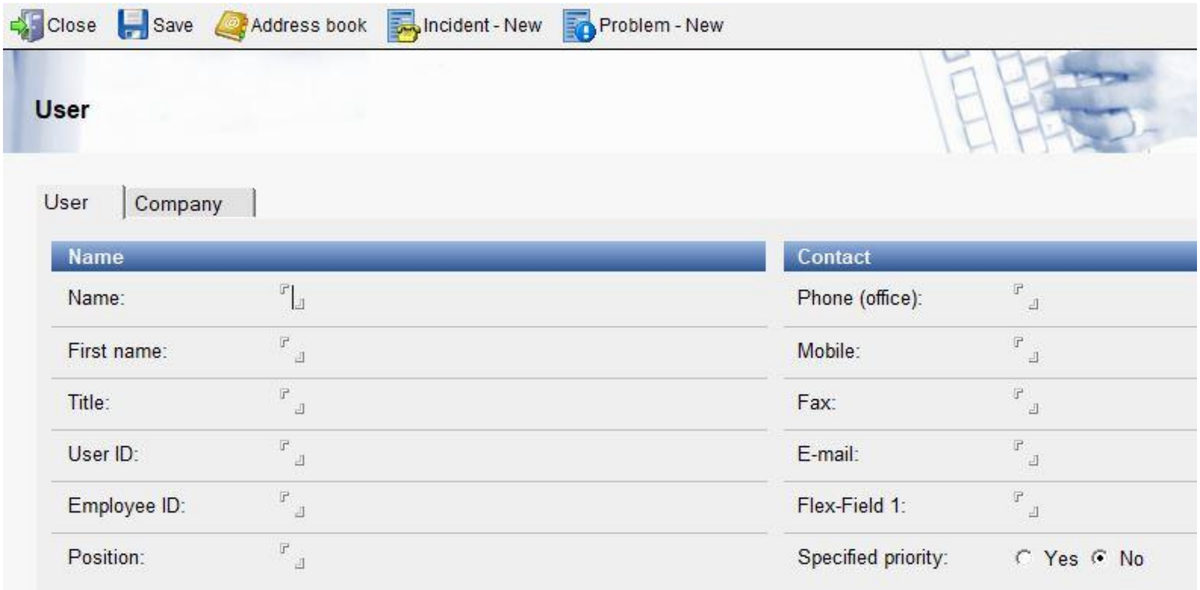


Fig. 5: Screen for creating a new user

- You can create new configuration items via the config. item button. Differentiation is made between creating a configuration item not associated with a user (Equipment > New – Solo), a configuration item for a selected user (Equipment > New – to User) or a configuration item for an already existing one (Equipment > New – to Config. Item) as a sub-configuration item.

  A new window opens in which the configuration item data is entered.
- With the Equipment > Change assignment button (see fig. Fig. 6) you can easily change the assignment of configuration items or assign them to another user.

  To do so, first select the configuration item to be reassigned, and a small check mark will appear to the left of it.

  Then select the user the configuration item is to be assigned to in the same way.

  Finally, click the Equipment > Change assignment sub-action.

  You can also change the assignment of several configuration items simultaneously. To do so, select all configuration items concerned as well as the target user or the target configuration item. If a definite assignment cannot be identified, a notice will be displayed.

  In the figure below, the configuration item is now assigned to Agnelli, Sabrina.

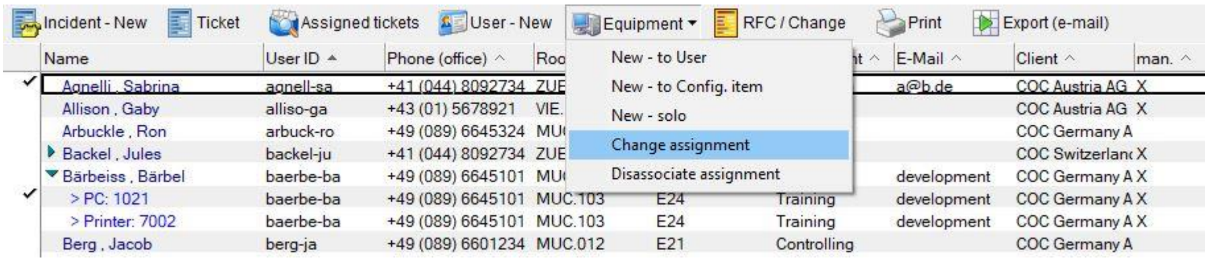


Fig. 6: Selection and sub-actions for changing the assignment of configuration items

- In contrast to this, you can disassociate an assigned configuration item/sub-configuration item from a user via EQUIPMENT > DISASSOCIATE ASSIGNMENT. Thus, sub-configuration items automatically become normal configuration items again.
- If you are using HelpMatics™ Change, you can directly create RFC documents or Change documents referring to the selected user data via the RFC / Change action, the appropriate authorization provided. This action is available in other views, such as Tickets\User: In this case references to the selected tickets will be integrated. The created documents can be further edited in HelpMatics™ Change.
  For quick documentation of changes the QUICK CHANGE – NEW action is available. For further information on Quick Changes refer to the HelpMatics™ Change documentation.

3.2 Configuration item

The RESOURCES > CONFIG. ITEMS view displays all configuration items supported by the helpdesk, arranged by configuration item numbers.

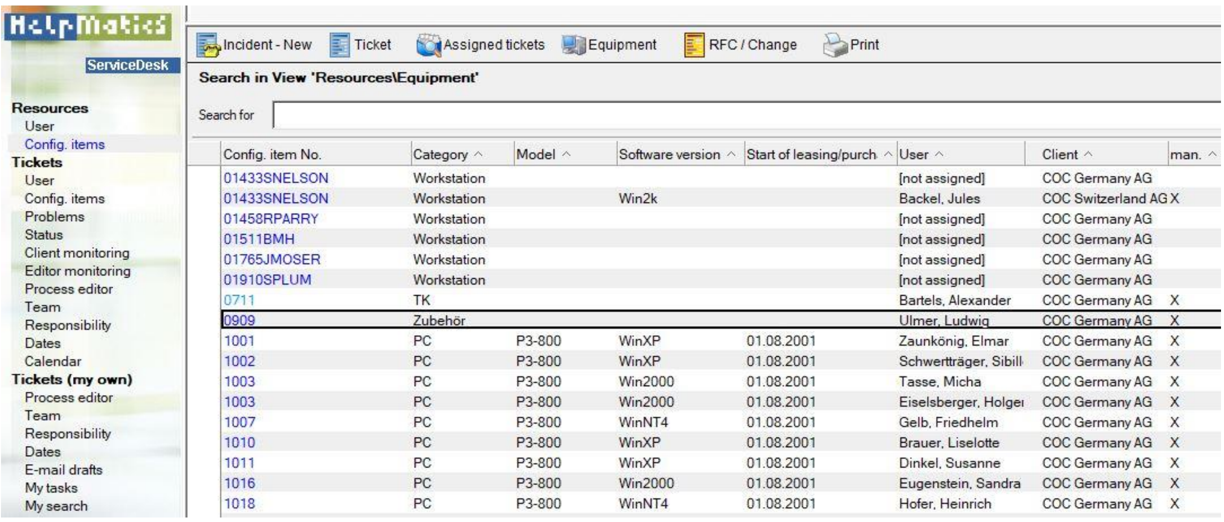


Fig. 7: Information on config. items

Note:
HelpMatics™ allows you to store much more information on the configuration items than is listed in the view and thus supports you in the resource management.

This view also allows you to perform various actions via the buttons of the action bar:

- With INCIDENT - NEW you can create a new incident ticket for the selected configuration item. In the same way you can create a new problem ticket with the TICKET > PROBLEM - NEW (EMPTY) button. The ASSIGNED TICKETS button shows you the tickets connected with the selected configuration item. By double-clicking a ticket, you can directly go to the ticket.

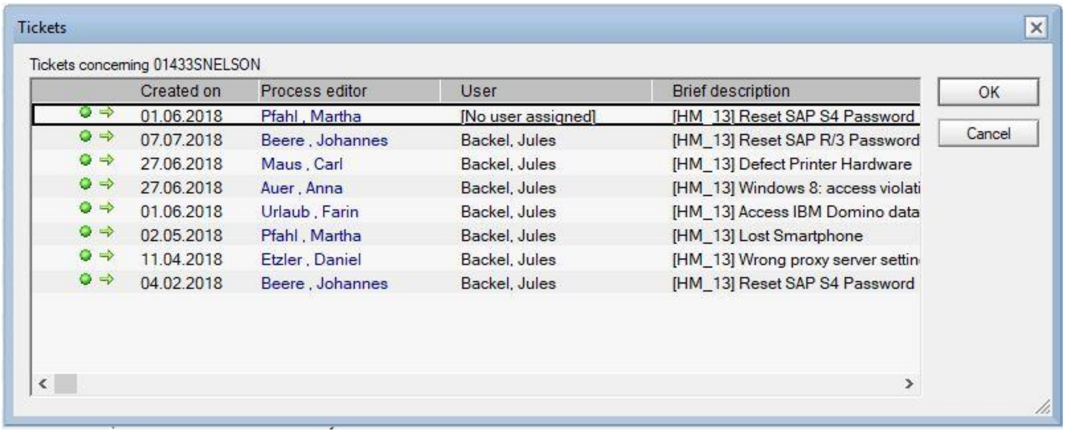


Fig. 8: Assigned configuration items

- Via the NEW – EQUIPMENT sub-action you can add a new configuration item (for how to create a "solo" config. item, see above).

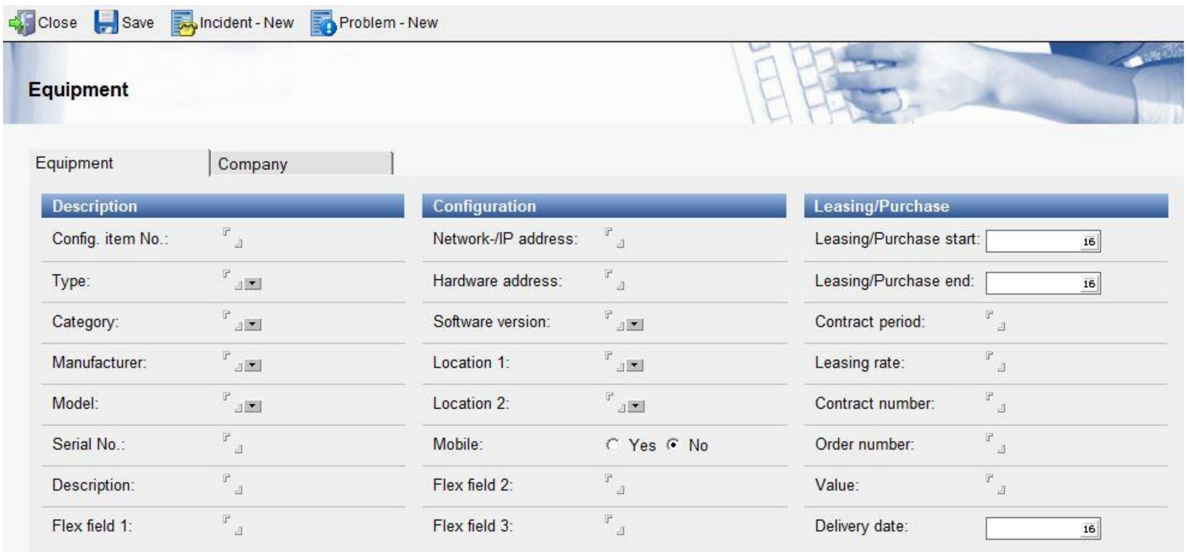


Fig. 9: Screen for creating configuration items

- In order to change the data of a configuration item of this list, select it in this view and click EDIT.
- If you are using HelpMatics™ Change, you can directly create RFC documents or Change documents referring to the configuration item data via the RFC / Change action, the appropriate authorization provided. These will be further edited in HelpMatics™ Change.

4 Incident ticket recording

4.1 Assignment to Resources

A ticket is created on the basis of the user and configuration item data recorded in HelpMatics™.

With the Incident – New button you can create a new incident ticket for the selected configuration item or user.

4.2 Comparing data of existing tickets to resources data

If a new ticket is created on the basis of an existing one in the ticket views (INCIDENT – NEW OR TICKET > INCIDENT – COPY), the user and configuration item data of the underlying ticket will be compared to the resource data. This function is to ensure that the current resource data is used when a ticket is created.

Comparison is made on the basis of the name (last name, first name). If several user documents with the same name are found, search will be continued via user ID and e-mail. If exactly one user document is found, the user data (green area) will be transferred from the resource document into the ticket - if differences to the ticket have been determined.

Configuration items – if assigned - are searched for via the configuration item number. In case of an unambiguous search result and data differences,
the configuration item data (blue area) will be transferred into the ticket.

If a new ticket (INCIDENT – NEW) is created, a data replication will be performed automatically without the ticket creator being informed.

When creating a ticket copy (INCIDENT – COPY) the creator will be informed of data differences and can decide on a data refresh in the ticket. The message displayed differentiates between user and configuration item. This means that there may be two messages.

4.3 Rapid recorder (rapid recording window)

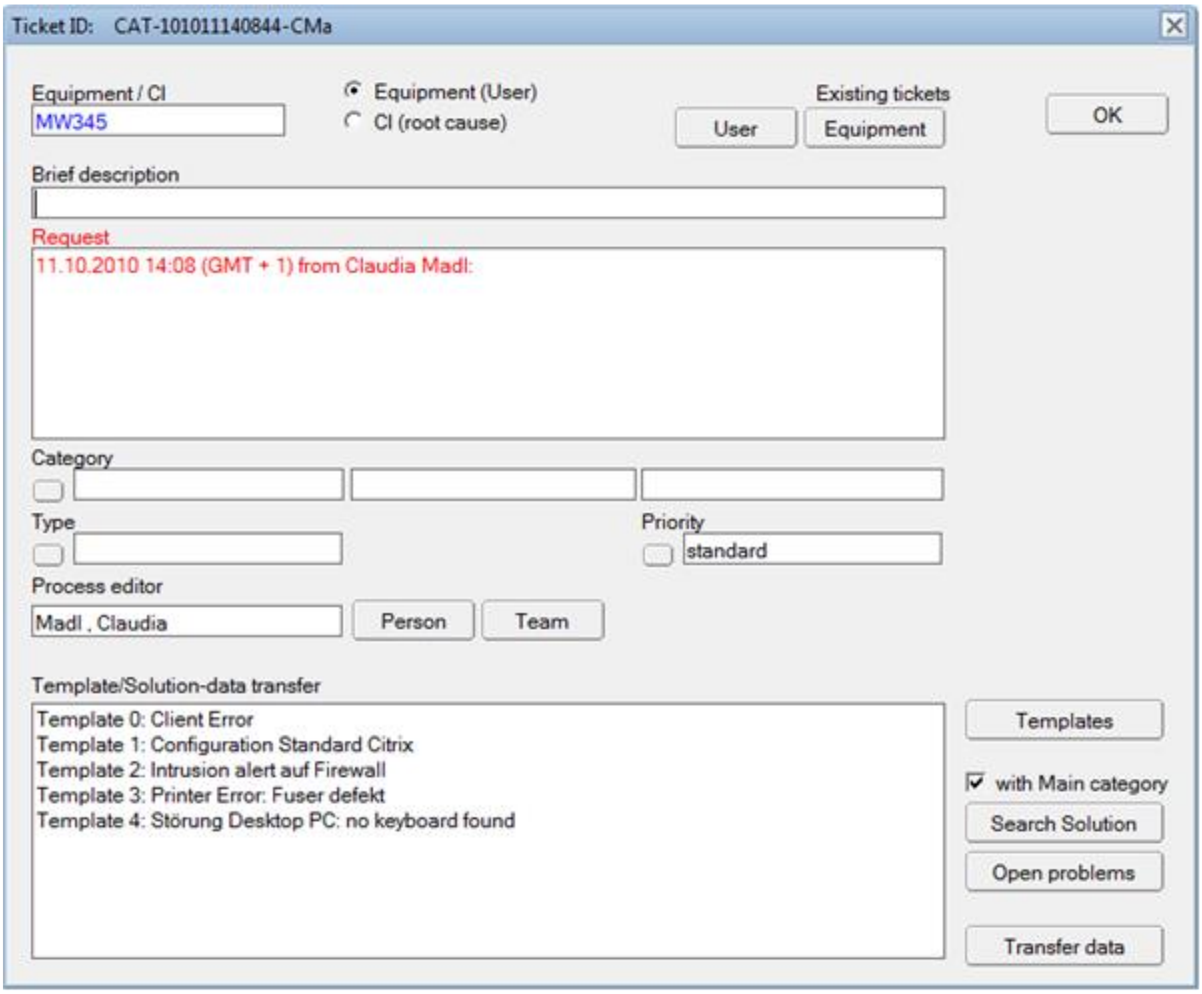


Fig. 10: Rapid Recorder

Note:
New ticket templates can be created via Administration in the Navigator.

The Rapid Recorder is a window for rapid recording of ticket data and appears prior to the actual ticket window.

The ticket is automatically assigned on the basis of the user or configuration item selected before.

The Rapid Recorder facilitates data recording as it is clearly arranged and only contains the most important fields. Other information that can also be entered later, e.g. after the phone call, will only appear in the window for new tickets.

The rapid recording window is divided into the following areas:

4.3.1 CIs

Regarding the configuration items you can determine if they belong to the user or are the reason for the creation of the ticket.

Beneath Existing tickets already existing tickets associated with the user or configuration item can be viewed via a dialog list by clicking the USER OR EQUIPMENT BUTTON. This information allows you to recognize recurring requests or faulty operations by users timely, or to complete already existing tickets.

4.3.2 Request

Enter a brief description and description of the problem or request there.

4.3.3 Category and process editor

The categories define the caller's request and facilitate the forwarding to experts.
By clicking the button next to Category you make your selection. Subcategories 1 and 2 depend on their superior category, i.e. only if you select e.g. Software as main category, will MS Office be displayed.
If you selected the wrong subcategory by mistake, you get back to the previously selected superior category (main or subcategory 1) via the Cancel button and can correct your selection.
The category selection may influence the display of templates (see chapt. 4.3.4).

Choose a TYPE required for solving the request, e.g. installation or trouble shooting.

The Priority shows the urgency of a ticket. For every ticket a priority has to be set, which can be chosen freely from a list via a dialog box. Exception: A specified priority has been defined for the user in the user data. In this case the priority as stored in the user data will be set and will be clearly identified as specified priority.
For the current ticket the default priority can be adapted to the process requirements by the process editor. As a result, the ticket will no longer be identified as having a specified priority. If you create a new ticket based on this ticket (e.g. in the TICKETS – USER view), no specified priority will be set.

The process editor may be a person or a group of people entered in the processor lists. If you click the Person or Team button, you can select from the list of all process editors or teams.

4.3.4 Template selection / Solution data transfer

You can select a template in the bottom section (TEMPLATE/SOLUTION DATA TRANSFER).

The display of ticket templates may vary depending on the configuration. Ticket templates that only apply to a certain client are only available for selection in tickets of the relevant client. The selected user or the selected ticket forms the basis for the client of the new ticket.

Another criterion for the availability of ticket templates is the category: depending on the category selected, a specific set of ticket templates will be available. You define the category also by taking over a template and thus influence the templates displayed now. If, despite you have set a category, the basic templates are offered, just click the Templates button.

You can perform a search in the knowledge base via the SEARCH SOLUTION button. The search will consider the text of the short description (OR-operation) and the main category, if selected.

The OPEN PROBLEMS button allows you to extend the search to problems. The search comprises short description and/or main category in various possible combinations.

Via the Transfer Data button, the selected template and/or the knowledge base entry or the problem can be inserted into the current ticket.

The following data will be replaced:

- brief description
- Solution
- Processing (from template only)
- Root cause (from template only)
- Type (from template only)
- Category (from template only)
- Process editor/team (from template only)

The following data will be added:

- Request

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The availability can already be set in the Rapid Recorder. However, a global category has to be selected first. Only then will the button AVAILABILITY be displayed. You can select from the following options:
LOCAL (by default, in the current database only), CENTRAL (in local and global databases) and GLOBAL (in all databases).

4.4 Ticket

In this window all data relating to a ticket is displayed.

A ticket has always to be assigned to a user or CI. The ticket client results from this assignment. If a user or CI is assigned to a different client, it might be necessary to select a new category and priority.

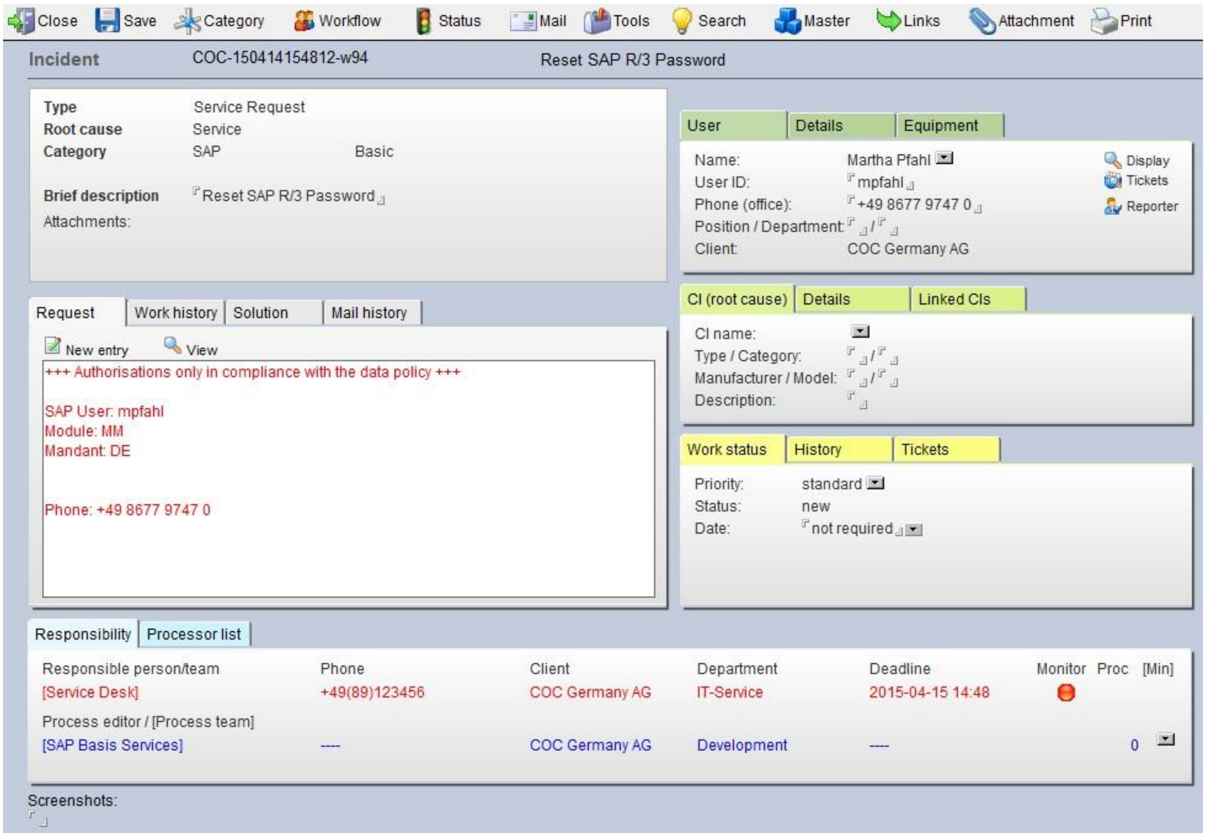

Fig. 11: Ticket window

The 

button is available in the action bar for new tickets that have not been saved

All templates available for the client are offered. If the category is also set, the category filter will be applied. Click ALL TEMPLATES to remove the category filter. When you select a new template, the existing values will be overwritten in the ticket, except for entries in the request, solution and edit fields. Here, the texts from the new template will be entered at the end.

4.4.1 Ticket information

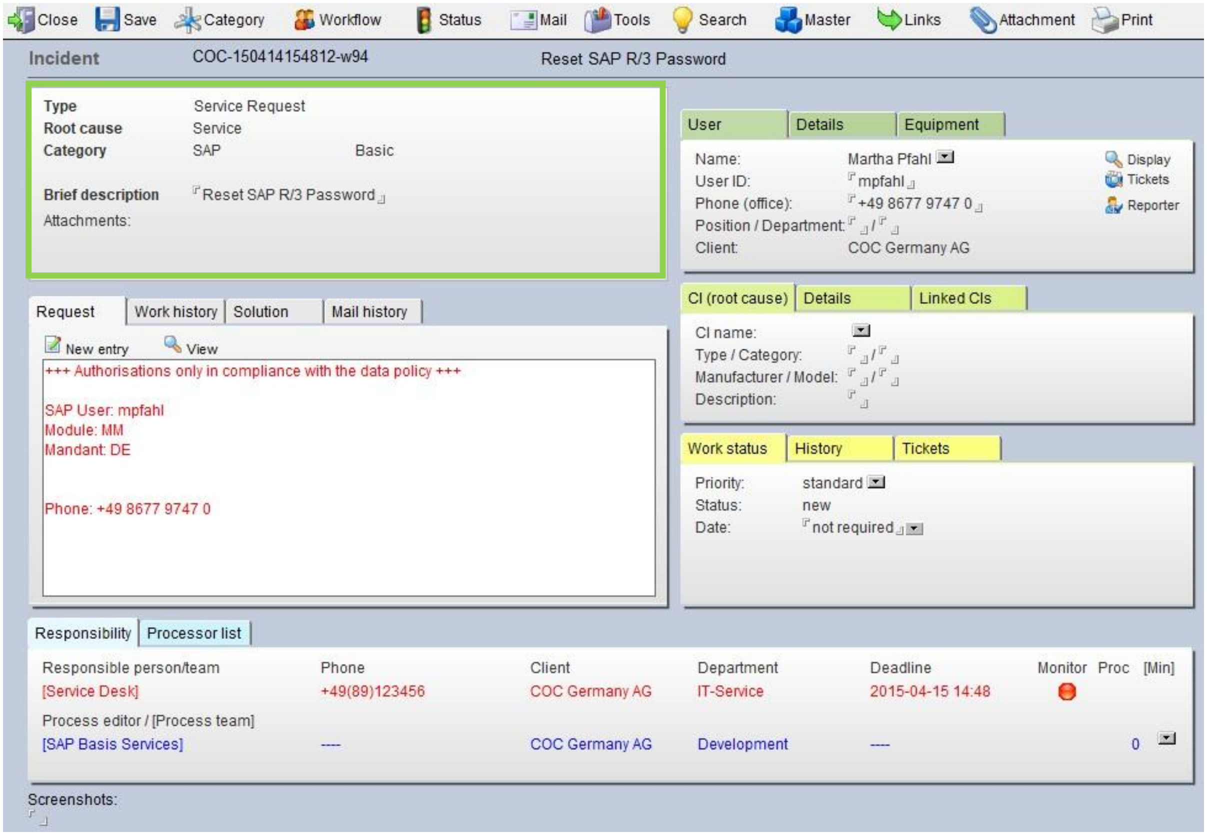

Fig. 12: Ticket information

This area contains the information on ticket ID, brief description, categories and type of ticket which you entered in the Rapid Recording window.

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If you have selected a category to which one or more services are assigned, then this service will be set and/or a selection being offered. The service is displayed below the category now. Using the category-service button, you have an additional option for services. If a new service is selected, a check is made as to whether the current ticket priority is identical with the service priority. If not, a dialog window will be opened for selecting the priority.

If a service is removed from the ticket, the client's service level will be used, and, if applicable, the priority is to be newly selected.

For further information, refer to the HelpMatics™ CMS module documentation.

ENTERPRISE:

If you have selected a global category, you find the availability control below the brief description: LOCAL (by default, in the current database only), CENTRAL (in local and global databases) and GLOBAL (in all databases).

In case the ticket is forwarded to a process editor of another client, relevant messages referring to the change of availability will be displayed.

It is not possible to downgrade the availability (e.g. from global to local).

4.4.2 User information

Clicking the button you can change the assignment to a user. You can also modify the entries in the fields. If, however, you change data in the User tab, the changes will only affect this ticket. To change the user profile permanently, go to Resources/User, select the respective user and open the user data with a double-click. Alternatively, you can open the user document from the ticket via the Display button. Now click the EDIT button to change the data.

If you change the user to a user of a different client, the priority will be emptied. The priority values of the new client will then be offered for selection.

You differentiate between reporting users and users causing the ticket.
Existing tickets concerning a specific user can be called via the TICKETS button.

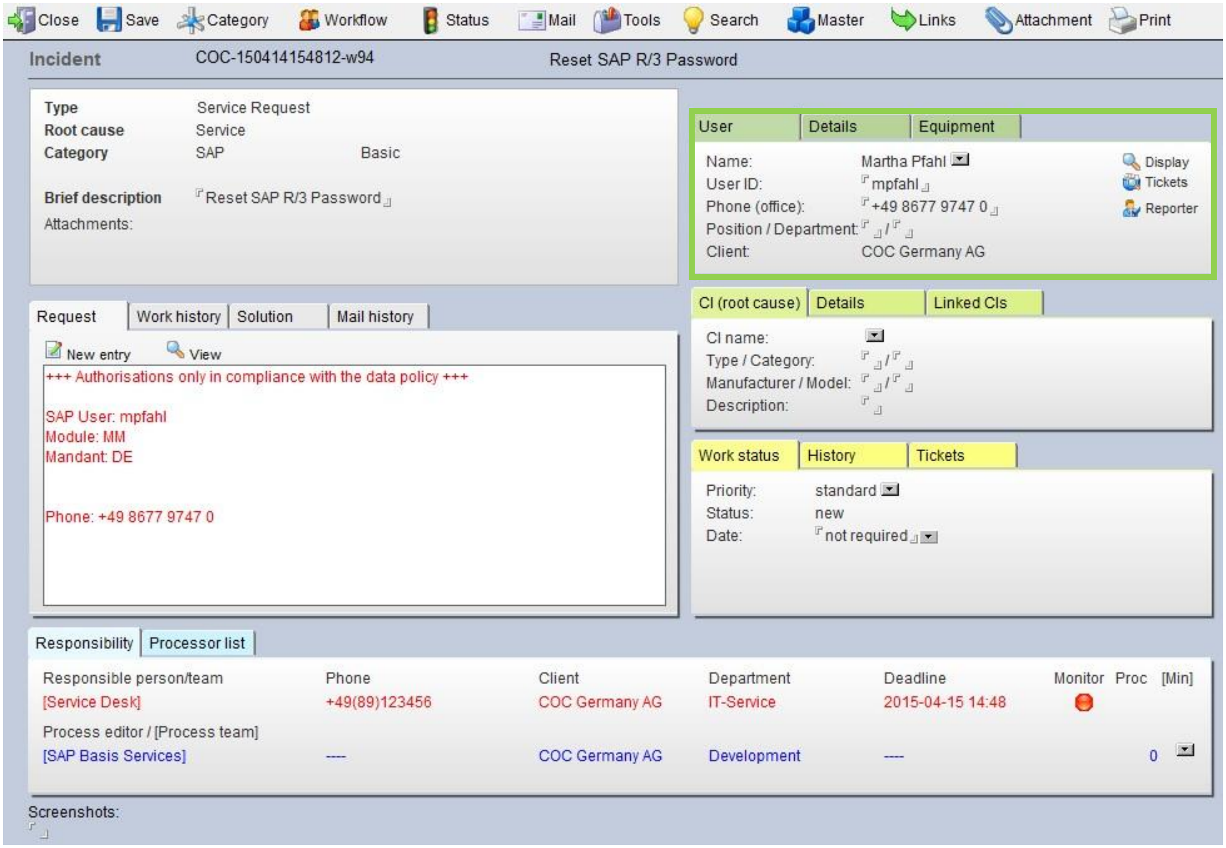


Fig. 13: User information

The config. item used by the user can be entered in the Configuration item tab.

4.4.3 CI (root cause) - Information

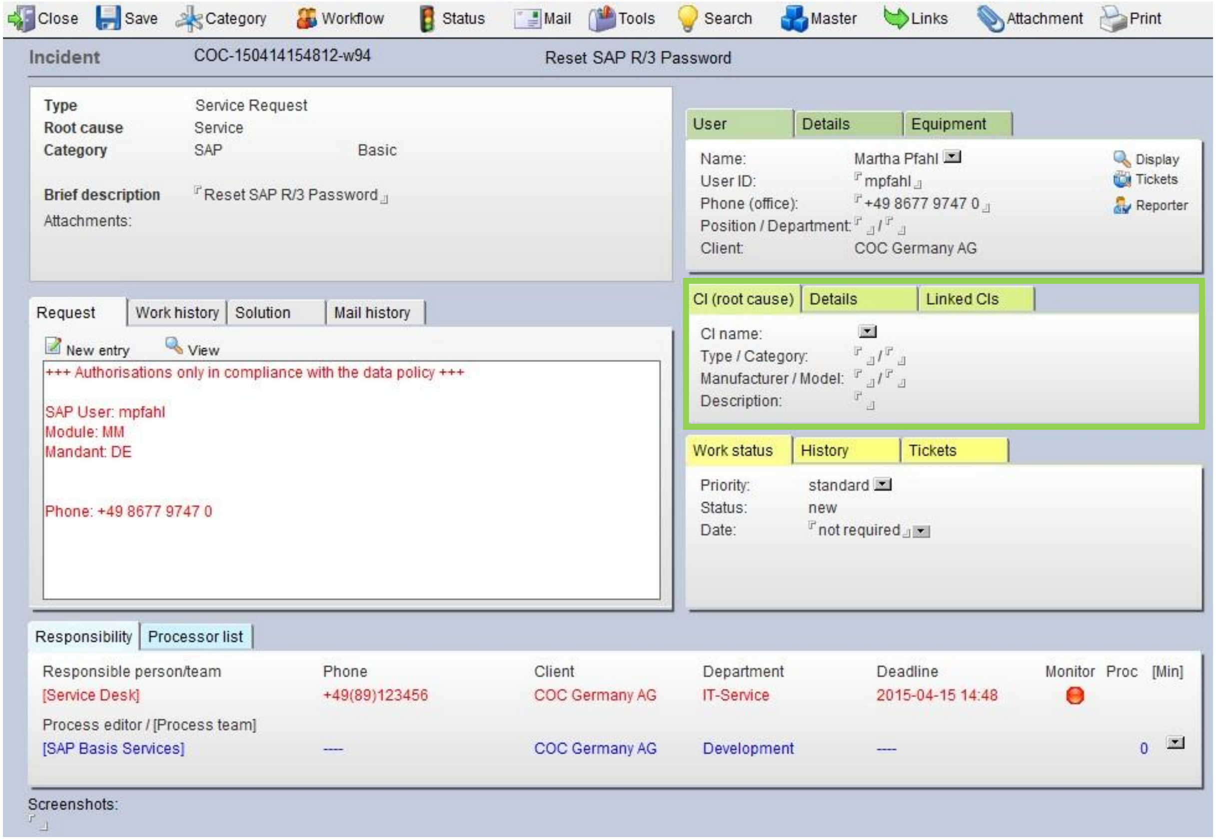


Fig. 14: CI (root cause) - Information

In incident tickets information on the CI causing the incident can be stored.

Clicking the ▼ button you can change the assignment by selecting a CI from the list offered. Configuration item data will automatically be transferred into the corresponding fields. If a user has already been assigned to the incident ticket, only configuration items belonging to this user will be displayed in the list first. Click Cancel in the selection window if HelpMatics™ shall offer all configuration items for selection.

Existing tickets concerning the CI can be called via the TICKETS button.

Several (different) configuration items can be assigned to incident and problem tickets. The desired connections can be created via Links -> assign / disassociate config. items

The CI types USER, HARDWARE, SOFTWARE, DOCUMENTATION, GROUPS AND SERVICE are available when the CMS module is used. Otherwise only equipment can be selected.

4.4.4 Information on ticket processing (work status)

The WORK STATUS tab shows you the priority of a ticket. This can be changed, if necessary. Moreover, a date can be defined (also see 5.2)

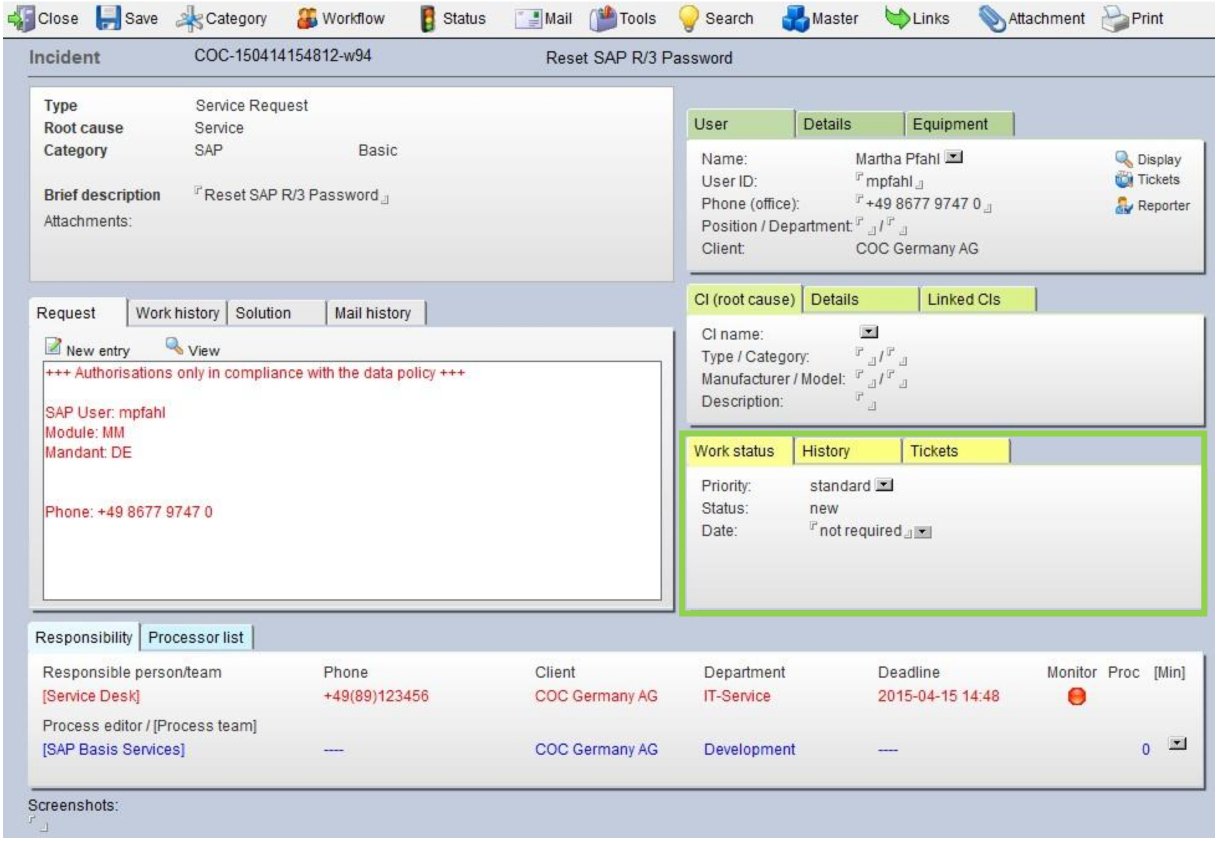


Fig. 15: Information on ticket processing (work status)

If you are using HelpMatics™ CMS, the additional service selection option is available. If a new service is selected, a check will be made if the current priority of the ticket corresponds to the service priority. If not, a dialog window for priority selection opens.

For more detailed information, refer to the HelpMatics™ CMS module documentation.

4.4.5 Ticket history

The History displays the changes of priority and status recorded in the course of ticket processing.

Fig. 16: Ticket history

No changes can be made there.

4.4.6 Document links

Ticket links to other incidents, problems, RFCs and changes are listed in a separate tab. This makes the process chain more consistent and transparent and interconnections immediately recognizable.

4.4.7 Ticket responsibility

In the RESPONSIBILITY tab you can see the responsible person/team and the current process editor.

Fig. 17: Responsibility

The PROCESSOR LIST tab shows you the course the ticket has taken at the ServiceDesk. You can see there who was process editor and when, and who edited this ticket at what time.

Fig. 18: Processor list

The process editor currently logged in can enter the time he/she needed for processing the ticket in minutes (click the small button next to PROC. TIME [MIN]). The process time per process editor and day will be summed up. The process times can be retrieved via the HelpMatics™ Reporting feature.

In the RESPONSIBILITY tab (person currently responsible and process editor) an icon (see table below) is displayed in the responsible person line next to DEADLINE and the processing time PROC. [MIN]. Depending on the monitoring status (as defined in the SLA) of the ticket, the different monitoring levels are represented in different colors in order to highlight when the specified deadline has been exceeded.

The same representation is used for process editor monitoring (Process editor/[Process team]) - if activated in the process editor documents.

Monitoring level	Icon
MONITOR IN TIME / Status [on hold]	
MONITORING IN TIME	
MONITOR LEVEL 1	
MONITOR LEVEL 2	
MONITOR LEVEL 3	

4.4.8 Request

A request is entered into this area.

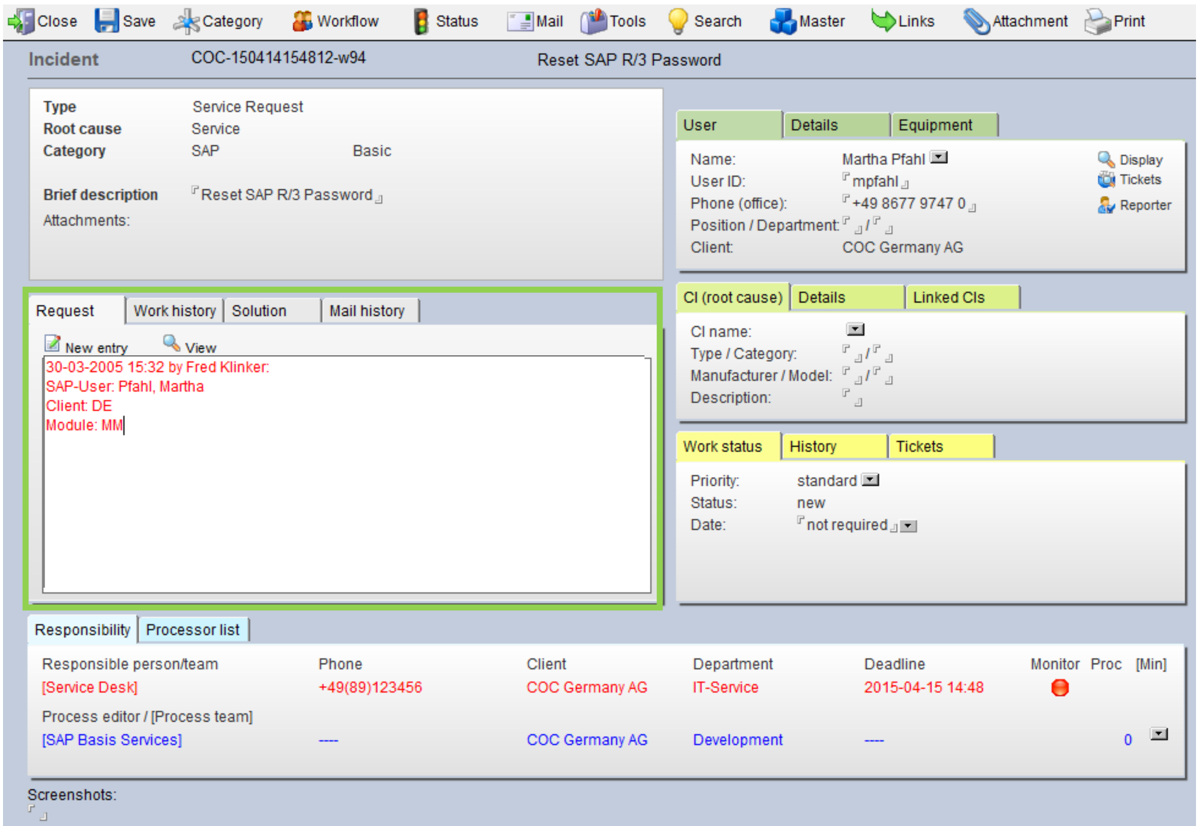


Fig. 19: Information on request, work history, solution and mail history

4.4.9 Work history

This tab is used for recording the complete action history necessary for finding a solution.

4.4.10 Solution

You can enter the solution description in this area. Use the NEW ENTRY icon in the Solution tab to enter time and name in the solution window. Thus a click on NEW ENTRY above the solution window, e.g., causes an entry such as e.g. 30-03-2005 15:32 by Fred Klinker to be displayed if this is the first entry in the field. If not, a dividing line will be inserted before the actual entry. If you want to see this entry in the Knowledge base after it has been resolved, check the box ENTRY IN KNOWLEDGE BASE in the solution window.

Clicking the View button displays request and solution texts in a separate window. This is useful in case of extensive descriptions. Process editing, however, is not possible there.

4.4.11 Mail history

The complete mail traffic – if created via the ticket - is displayed there in an embedded view. Mails can be opened directly from the ticket. You can send replies from an opened e-mail unless the ticket has the status CLOSED.

4.5 Closing a ticket

You can close a ticket by setting the status to CLOSED in the action bar.

A dialog with the question 'Is the user to be informed about the completion of the ticket by e-mail?' will be displayed when saving a closed ticket – if the corresponding setting has been made in the client document.

4.6 Taking over a ticket

If you want to edit a ticket you have not created or which has not been assigned to you, you will be asked - after opening the document - if you want to take over the ticket. After confirming with YES you can make your entries and save them. You will now be displayed as process editor in the processor list.

If you do not want to take over the ticket, you can only edit it if you are the person responsible for the ticket or have been granted extended rights in HelpMatics™.

4.7 Opening a closed ticket

You can view closed tickets by double-clicking them in the corresponding view. Editing closed tickets is not possible. To edit closed tickets, click the Reopen button (available only for authorized persons).

4.8 Copying a ticket

If the user's history shows that he/she has had a similar request before, you can copy this data into a new ticket.

To do so, select the existing ticket in the Tickets > User view and click the TICKET > INCIDENT – COPY button.

4.9 Master tickets

4.9.1 Creating a master ticket

A master ticket is a ticket superior to sub-tickets that have been assigned to it. These sub-tickets have been recorded for other users for one and the same incident, e.g. in case of a mass failure or a request concerning many users.

Fig. 20: Marking a master ticket

To create a master ticket and simultaneously provide information about this ticket, you first create a new info (see paragraph 10.2). Enter the info text and activate the MASTER TICKET (YES) option. Select THE MASTER > MASTER INCIDENT- NEW button now displayed on the action bar. In selecting the command, the information text will be automatically copied into the brief description. Save and close the new master ticket before editing and saving the information. The priority of the information will automatically be set to high when the master ticket is assigned. You may, however, change the priority, if necessary.

Instead of creating a new master ticket you can also select an already recorded ticket via the MASTER > CONNECT MASTER INCIDENT button. This ticket will then become a master ticket.

Information assigned to a master ticket is identified on the Info display by an icon and by coloring as long as the master ticket status has not been set to closed.

Fig. 21: Info display with the master info being marked

It is also possible to create a master ticket without having information relating to it. In the ticket, use the MASTER > CONVERT TO MASTER INCIDENT menu item.

Please note: A master template for quickly recording sub-tickets in the Rapid Recorder will not be available in this case! And sub-tickets can only be assigned or created via the Master menu in the master ticket.

4.9.2 Assigning sub-tickets

If a master ticket relating to an incident already exists, further tickets should be assigned to it. For assigning a ticket, select the corresponding master template in the Rapid Recorder when creating the ticket (all master tickets the information of which is identified as master on the info display are available). After clicking Transfer Data, the new ticket will be identified as sub-ticket and the following data will be transferred from the master ticket:

- Type
- Category
- brief description
- Request and solution description (the transferred text will be marked).
- The person in charge of the master ticket will be appointed process editor and person responsible for the sub-ticket.

The status will be set to on hold but, in contrast to the standard ticket, it is not necessary to set a date).

Alternatively, after double-clicking a master info item, you may also create a new sub-ticket via the SUB-INCIDENT – NEW button. This command is also available via the button MASTER in each master ticket.

Existing tickets can be assigned later to a master ticket via the
MASTER > CONVERT TO SUB-INCIDENT menu item. This menu item is available in the master ticket as well as in the master info.

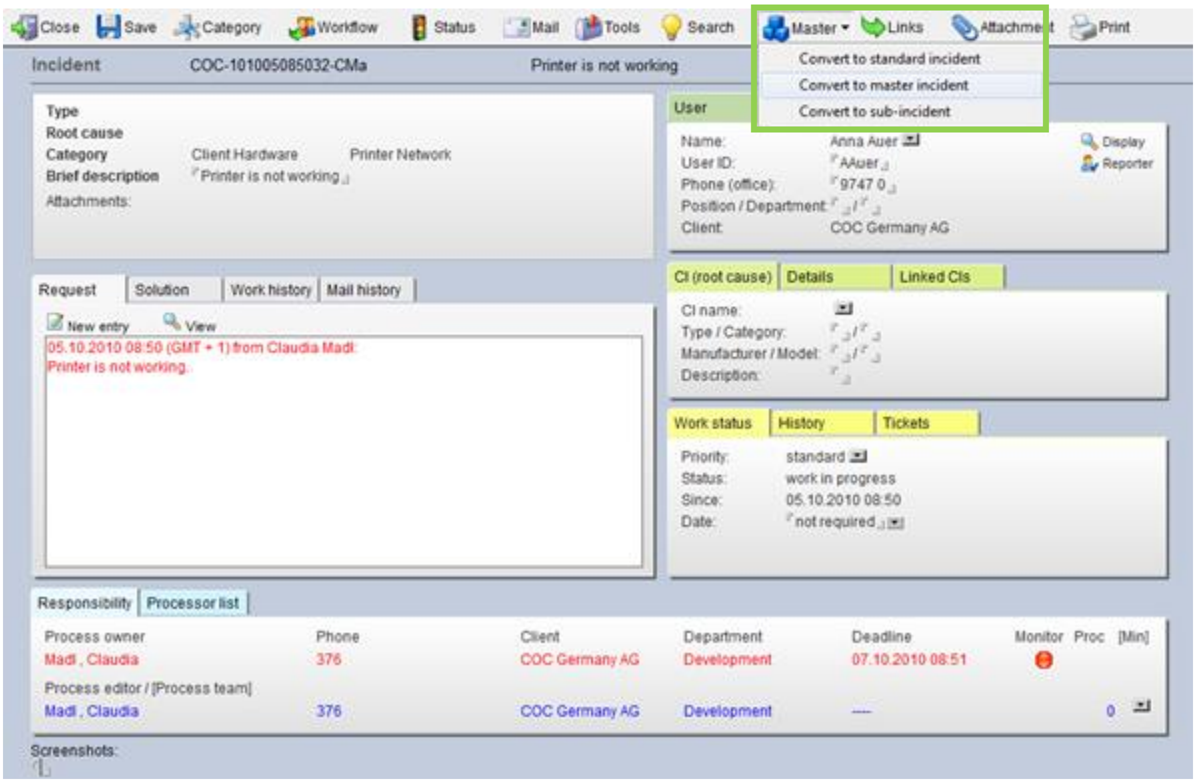


Fig. 22: Action button in the ticket window with master ticket actions

4.9.3 Handling master tickets

All processing steps can be documented in the master ticket. Editing sub-tickets is not necessary.

When sending an e-mail from the master ticket, all addressees from master and assigned sub-tickets will be entered in the blind copy field of the e-mail.

Upon closing a master ticket, all assigned sub-tickets will be closed as well and the data mentioned in paragraph 4.9.2 will be updated in the sub-tickets. This does not apply to Sub-Tickets that have already been closed manually.

4.9.4 Converting tickets

- Converting standard tickets to sub-tickets

In the standard ticket window, under Master, click the CONVERT TO SUB-INCIDENT button, in order to convert a standard ticket to a sub-ticket and connect it to an already existing master ticket. If the master ticket is not displayed in the selection window yet, you can refresh the selection list via [F9].

- Converting standard tickets to master tickets

Back in the standard ticket window, you can convert a normal standard ticket to a master ticket if, e.g., it has turned out that a ticket has been created for an incident affecting many users. To do so, select Master > Convert to Master Incident.

4.10 Scheduled tickets

Scheduled tickets are service requests that, if required, are created using a ticket template and become active at a fixed point in time. Scheduled tickets are marked by a gray icon in the overviews.

If you create a ticket using the TICKET > SCHEDULED TICKET – NEW button, only ticket templates with service request type are available. An activation time is to be scheduled for the newly created ticket. The ticket will automatically be active as soon as the deadline has been met. Up to this point, it remains in the SCHEDULED status without the calculation of any processing times and escalation levels.

When the date expires, the ticket will automatically be activated:

- Sending an e-mail notification to users and process editors
- Status OPEN
- Calculation of processing time and escalation levels.

5 Working with tickets

5.1 Action bar

On the action bar of the ticket window you can perform different actions, which are described in the following. Please note that changing to the edit mode is possible only for process owners of the ticket, process editors or administrators.

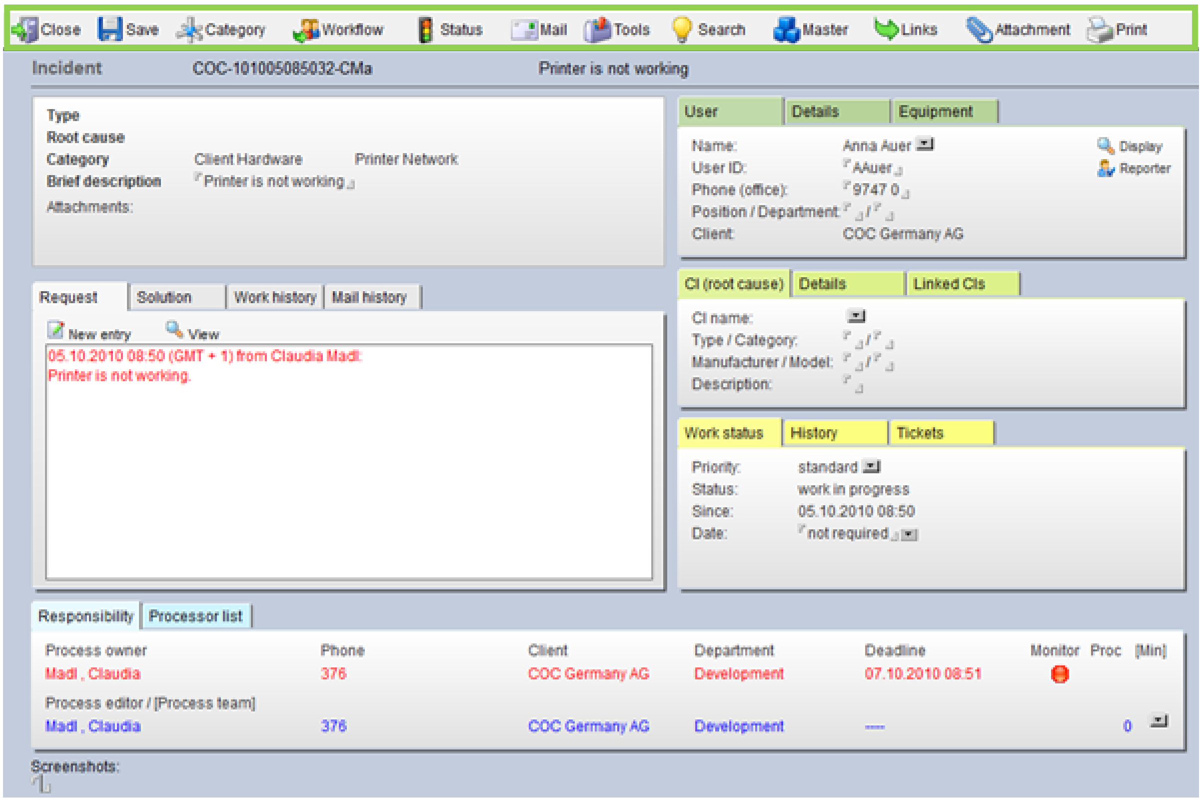
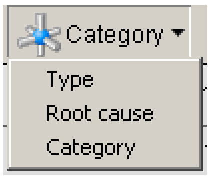


Fig. 23: Action bar of the ticket window

5.1.1 Categories



A category or a type can be assigned to the ticket. A category or a type can be assigned to the ticket.

- Ticket category

Via this window you can select main and sub-categories.

- Ticket type

You can assign a ticket type there. The type selected may have an influence on the root causes displayed for selection. When you select a type, this may cause the root cause field to be emptied if there is no link between type and root cause. Then you have to newly assign a root cause.

New categories, types and their connection to root causes can be created via Administration only.

- Root cause

Select a root cause from this list. The terms that are available for selection are defined by the Administration. Depending on the configuration, various root causes may only be available for certain types.
The entry of a root cause is required for closing a ticket.

5.1.2 Workflow

Here the process editor or the process team as well as the status of the returned tickets is selected.

- PROCESS EDITOR

To assign a ticket to another process editor, click Process editor and select the desired person from the dialog window.

- PROCESS TEAM

A process team is selected e.g. when the ticket is passed on to the 2nd level.

Use of the default process team will be offered if the following preconditions are fulfilled:

- a default process team has been assigned to the category
- the ticket is forwarded for the first time

If the ticket has been forwarded more than once, the default process team will only be offered for selection if the process owner of the ticket changes the category.

- BACK TO RESPONSIBLE PERSON/TEAM

This action is used to return the ticket to the responsible person/team together with a note on the processing status that is selected from a dialog box (see Fig 24). The status is identified in the ticket views by an icon (see paragraph 2.4.2) and displayed in the processor list as a numerical value (see table below).

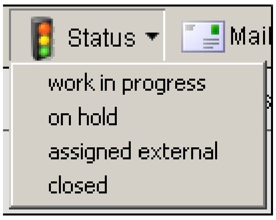
Fig 24: Dialog box displayed when returning a ticket to the responsible person/team

Process editor / [Process team]	Phone	Client	Department	Assigned	Back	Proc. [min]
Madl , Claudia	----	COC Germany AG	Development	09.02.2007 13:56	-	0
[User Administration]	----	COC Germany AG	IT-Service	09.02.2007 13:56	-	0
Madl , Claudia	----	COC Germany AG	Development	09.02.2007 13:56	-	0
Madl , Claudia	----	COC Germany AG	Development	09.02.2007 13:56	1	

Fig. 25: Processor list with returned ticket status

Returned ticket status	Value in the BACK column of the processor list
closed / user informed	3
closed / user not informed	2
further processing required	1
incorrect ticket assignment	0

5.1.3 Status



Here you can manually assign a status to the ticket.

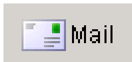
ON HOLD status allows you to stop the process time. In this case you have to enter a date.

The closed status is not available to 2nd level team members.

In the following cases the status will be changed automatically:

Action:	**New status:**
A ticket with work in progress status is edited again and saved. Exception: The current process editor is the person responsible for the ticket and the ticket is not transferred.	WORK IN PROGRESS
A date is entered in the ticket and saved. The user is asked if the status is to be set to ON HOLD.	ON HOLD (optional)
A check is made in the background as to whether the dates entered in the ticket have been exceeded. If a date has been reached, the status will be set to work in progress (except for sub-tickets) and the process editor in charge will be informed via e-mail.	WORK IN PROGRESS
A ticket is assigned to a master as sub-ticket. The status of the sub-ticket will be on hold.	ON HOLD
The status of a master ticket is set to Closed and saved: All sub-tickets assigned to it will also get the Closed status.	CLOSED

5.1.4 Mail



Using this button you can send notifications via e-mail.

If several Mail Templates are stored, they will be displayed for selection in a selection window.

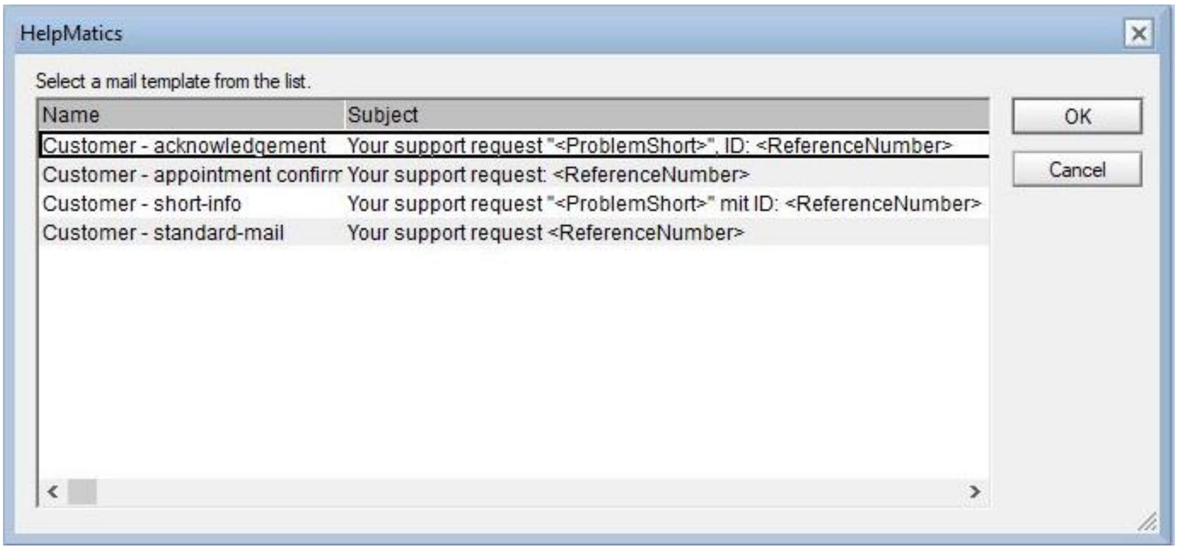


Fig. 26: Dialog box for mail template selection

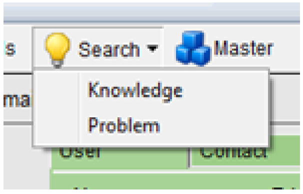
These mails are displayed in the MAIL HISTORY tab.

Mails saved as draft can be viewed, processed and sent under Tickets (my own).

5.1.5 Tools

Via this button programs can be started.
It is possible to transfer data from the Ticket (e.g. a Ping to a configuration item). Whether the IP-address or the configuration item number is used can be specified in the administration.

5.1.6 Search

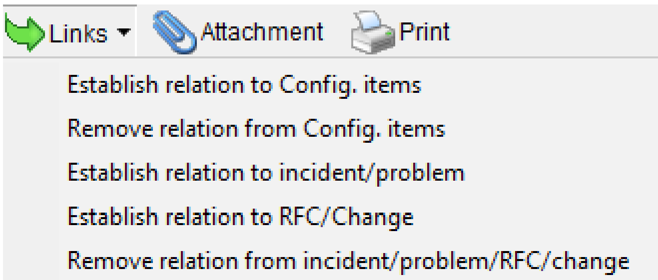


In the ticket window, a search can be conducted for both, knowledge base entries and problems.

In both cases the data can be transferred into the ticket or be opened for a more exact search.

Furthermore, the search for problems offers the option of linking to problems.

5.1.7 Links

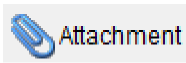


Various configuration items can be assigned to the ticket via Links.

These will be listed in the LINKED CIs tab.

- ESTABLISH RELATION TO INCIDENT/PROBLEM
  By selecting this button you can assign any number of tickets (incidents, problems, RFCs and changes) being related to the problem and possibly having significance for triggering an RFC or making a change to the problem ticket.
  Linked tickets are displayed in the tickets tab and can be opened by double click. The link will only be displayed after refreshing the document (Save or [F9] key).
- ASSIGN RFC/CHANGE
  If the HelpMatics™ Change module is available, links to RFCs and/or changes can be established. Linked RFCs/Changes are also displayed in the Tickets tab.
- REMOVE function
  By clicking this button, a dialog box will be opened displaying the links assigned to the document. Select the link to be removed and confirm your selection.
  The link list will only be refreshed after refreshing the document (save or control key [F9]).

5.1.8 Appendix



By clicking this button you can attach files to the ticket document. Screenshots can be directly inserted into the Screenshots field at the bottom of the ticket window via the clipboard.

5.1.9 Print

By using this button you can print the opened ticket in print view.

5.1.10 Button for extended functions

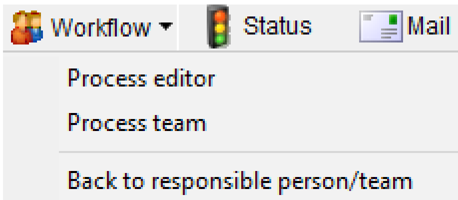
The process owner or team will be changed by clicking the button on the right in the menu bar,  the appropriate authorization provided. Usually, the responsible person is the person who created the ticket.

Via RESPONSIBLE TEAM the responsibility can be placed on a process team.

5.1.11 Problem Management

Forward to an individual process team

Problem tickets can be forwarded to individually composed process teams. This team is responsible for the particular problem ticket only.



You enter the name of the individual process team, its members and the mail notification option in a separate window.

5.2 Dates

Fig. 27: Information on ticket processing in the Work status tab

If you enter a date in the ticket, it is recommended to set the status to ON HOLD. In this way, the time until the date is reached will not be calculated as process time. If the status is set to on hold, a date has to be fixed. After the expiration of the date, the process editor will receive a reminder. At the same time the status will be set to work in progress again. This does, however, not apply to sub-tickets.

Fixed dates can be transferred into one's own calendar. 5 min. before the date starts a reminder appears. The calendar contains the most important information concerning the ticket and a link (HCL Notes) to it.

First of all, fix a date by selecting type and time. Then click in calendar.

The appointment can also be copied into the view DATES via the in CALENDAR button.

Fig. 28: Section from the Tickets > Dates view

6 Selecting existing tickets

6.1 Tickets (my own)

In the Navigator you find the TICKETS (MY OWN) section. The ticket information identifying you as process editor or responsible person is displayed in four different views.

You can change the representation of the view, e.g. sorting according to target date, category or type via the PROCESS EDITOR VIEW button (or TEAM VIEW, RESPONSIBILITY VIEW BUTTON).

The target date can be colored based on the configuration and monitoring level.

PROCESS EDITOR

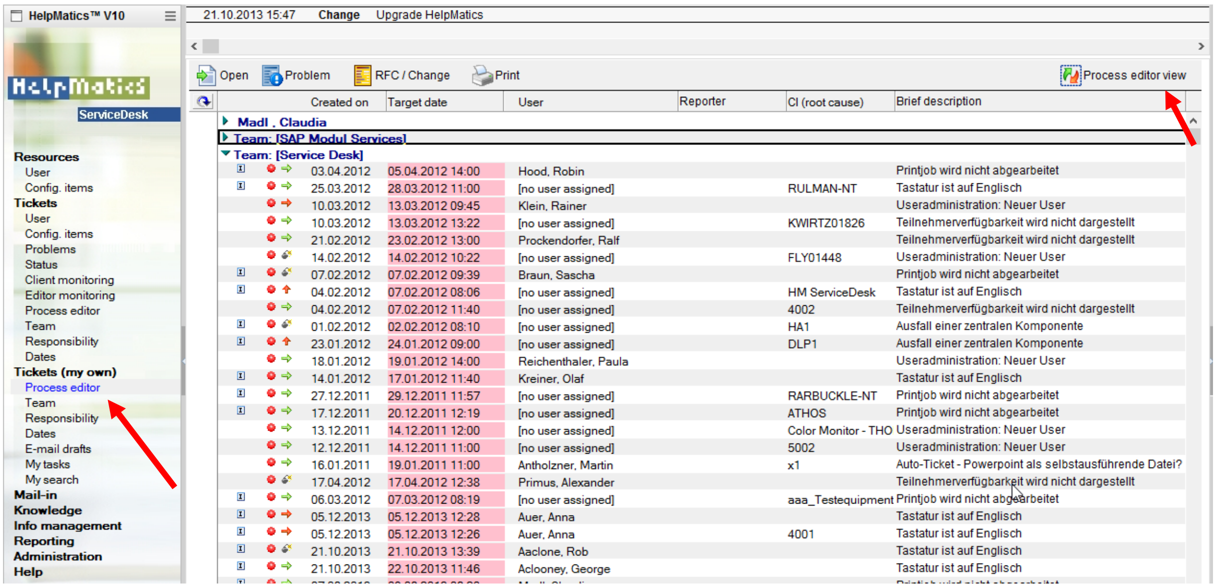


Fig. 29: Tickets (my own) – process editor

This view shows all active tickets for which you are entered as the current process editor. See paragraph 2.4 for an explanation of the icons.

The views can be minimized separately to enlarge the overall view.

TEAM

All tickets currently assigned to your own process team or to the process editors of this team are displayed here. So you can keep track of tickets processed by colleagues of your own process team(s).

RESPONSIBILITY

This view displays all active tickets you or teams you are a member of are responsible for.

DATES

This view shows all active Tickets for which a process date has been entered and for which you are the current process editor.

E-MAIL DRAFTS

E-Mails created for tickets can be saved as draft and later be sent. The drafts categorized according to ticket ID are contained in this view. A draft can be edited and sent unless the related ticket has been closed.

MY TASKS

In the upper part of the right section of this view all active incident tickets are displayed for which the logged in user is currently the process editor.

In the lower part, all documents of the knowledge base are displayed for which the logged in user is entered by name or, as member of a team, as manager or expert within the editorial workflow.

MY SEARCH

Tickets can be searched using different criteria.

All search criteria are linked with an "and" operation.

Fig. 30: Search window

6.2 All tickets

User tickets

The TICKETS > USER view displays all tickets arranged according to clients and the users the tickets have been created for. Both, active and closed tickets are displayed.

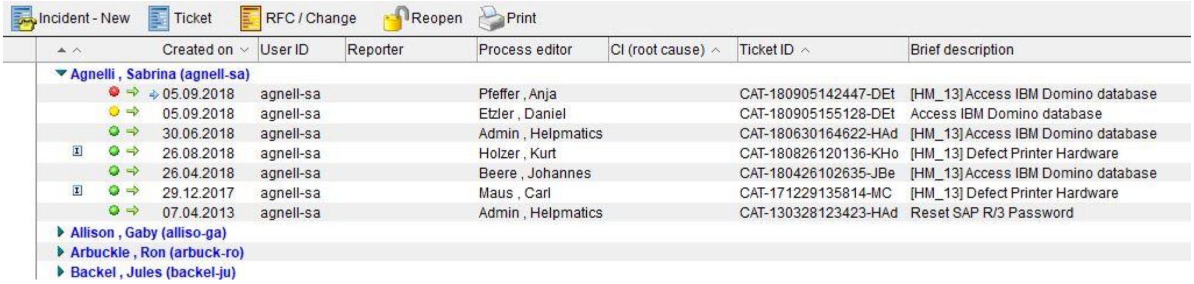


Fig. 31: Tickets per user

> Note:
> To copy the data of an already existing request of a user's, select the relevant ticket and then click the TICKET > INCIDENT - COPY button.

Buttons on the action bar:

- Select INCIDENT – NEW to create a new ticket. The user and configuration item data will be transferred from the ticket that has just been selected. With the TICKET > INCIDENT – COPY button, other ticket data, such as request, solution and category, will be transferred. You will then have the option of recording further data in the rapid recorder.
  Please note: When creating a ticket from the RESOURCES > USER and RESOURCES > CONFIG. ITEMS view, make sure that the current user and configuration item data is transferred into the ticket.
- A selected ticket can be opened and edited by double-clicking it.
- By means of the PRINT button you can print the complete view or the selected document.
- By clicking the REOPEN button, you can open a ticket again that has already been closed. Its status will then be WORK IN PROGRESS (appropriate authorization provided).

Here as well, you can use the sorting function described in paragraph 2 by clicking the triangles in the column titles and quick search.

TICKETS > CONFIG. ITEMS

This view shows all workstations supported by the helpdesk so far, sorted numerically by configuration item number, as well as data on the workstation.

In this view, the action buttons are the same as those in the TICKETS – USER view.

TICKETS > PROBLEMS

This view shows all open Problem tickets. Creation date, responsible person/team and category will also be displayed.

TICKETS > STATUS

All active tickets are displayed there according to their current status.

TICKETS > CLIENT MONITORING

Here you can see all open tickets sorted by their escalation level.
In the service level document, three escalation levels may be indicated for each client. Before using the view, it has to be refreshed via the Refresh button.

In addition, you can hierarchically escalate in 3 levels via the MANUAL ESCALATION button.

TICKETS > EDITOR MONITORING

Here you can see all open tickets for which service level monitoring is active (must be activated for the current process editor or process team). Before using the view, it has to be refreshed via the REFRESH button.
As is the case in client monitoring, 3 escalation levels are displayed (to be defined via the service level document for process editors). Here as well you can escalate manually.

TICKETS > PROCESS EDITOR

This view displays all active, i.e. open Tickets sorted by the process editor in charge. In this view you only require the OPEN and PRINT buttons.

TICKETS -> TEAM

This view shows the tickets according to the process editor's team membership. If a process editor cannot be assigned to a team, the process editor will be displayed.

TICKETS > RESPONSIBILITY

This view shows all active tasks, arranged by process owner and/or process team. In this view you only require the OPEN and PRINT buttons.

TICKETS > DATES

This view shows all active tickets containing a date of response, sorted by the process editor or process team the ticket was received by and by the date of response.

TICKETS > CALENDAR

This view shows all active tickets containing a date of response and all scheduled tickets displayed in a calendar view.

6.3 Tickets relating to resources

Via the ASSIGNED TICKETS button you can view the ticket history of the selected user or configuration item and open a ticket from the list. This button is available in the RESOURCES > USER, RESOURCES > CONFIG. ITEM view and in the Rapid Recorder.

7 Problem management

If frequently recurring Incidents are recognized as a Problem, a Problem ticket can be created by a Problem manager:

A process editor with the [&R_PROBLEMOWNER] role creates a problem ticket based on one or several incident tickets by using the TICKET > PROBLEM – NEW or PROBLEM - NEW - FROM TICKETS button. Alternatively, a problem ticket can be created on the basis of a user or configuration item (PROBLEM - NEW (EMPTY)).

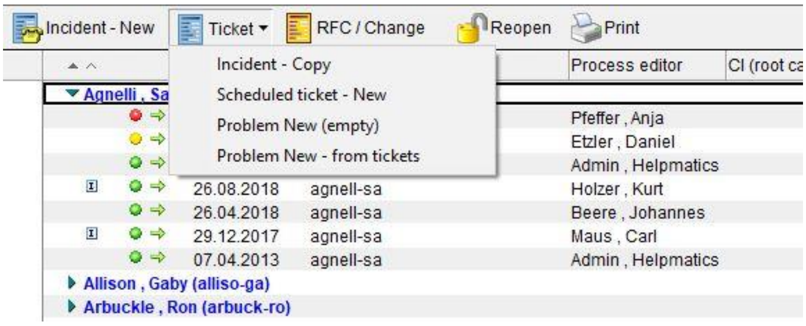


Fig. 32: Button TICKET

Process editors with the [_ProblemEditor] role must not create or close problem tickets or change their priority.

Problems are displayed in a separate Tickets/Problems view.

The ticket types available for problem tickets can be specified in the administration. The ticket ID of problems always starts with PRO. process editors In the ticket views, problem tickets are identified by the PRO icon.

In reporting, problem tickets are displayed in separate reports.

HelpMatics™ ServiceDesk allows problem owners to create a new RFC or Change for the HelpMatics™ Change module. Select the respective ticket(s) or resource(s) and then select the RFC / CHANGE > RFC – NEW OR CHANGE – NEW action in the action bar of the view. Links to the respective documents will be inserted into the new RFC or Change document. For more details regarding Change Management, refer to the HelpMatics™ Change manual.

7.1 CI Multi-links

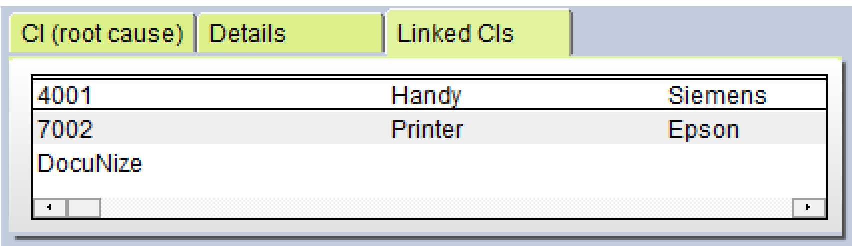


Fig. 33: CI multi-links in problem tickets

Problem tickets often do not concern only one configuration item. Connections to several (different) configuration items can therefore be established, or removed, here via LINKS -> ESTABLISH RELATION / REMOVE RELATION TO CONFIG. ITEMS.

8 Mail-In

Apart from using the above mentioned option of sending e-mails to users, you can call the HelpMatics™ Mail-In function by clicking MAIL-IN in the Navigator. In the corresponding view, the user requests directed to the helpdesk (via a specified e-mail address) by e-mail or via the portal are stored.

8.1 Mail-In features

8.1.1 Attach e-mail

By clicking the ATTACH E-MAIL TO TICKET button you can create an incident ticket directly from the e-mail. In order to assign a mail message from the Mail-In to a ticket, the ticket ID must be entered in the subject.

The ticket ID will be identified by its structure: Client's initials - time stamp - process editor's initials. Only the first ticket ID will be identified in the subject.

If no ticket ID is included in the subject, a ticket can be selected via a selection window.

8.1.2 Create a ticket

Via the INCIDENT-NEW (FROM E-MAIL) button a new ticket can be created out of the e-mail. If the sender is not found in the resources, you have to select the respective user from the selection window. So, all user data as well as the information from the e-mail will be transferred into the ticket. However, you have to enter additional data, e.g. category and, if applicable, configuration item, and click Save before closing.

You can transfer specifically selected contents or attachments into the ticket. Double-click to open the e-mail and start creating the ticket clicking the INCIDENT-NEW (FROM E-MAIL) button. At first, a window will open offering the attachments and the text for selection. If nothing is selected, the complete e-mail text will be transferred, in all other cases the selected attachments and text. Attachments that are smaller than 5 kB will not be offered for selection. Confirm the selection by clicking OK to continue creating the ticket.

The e-mail remains in its original state and is attached in the MAIL HISTORY tab.

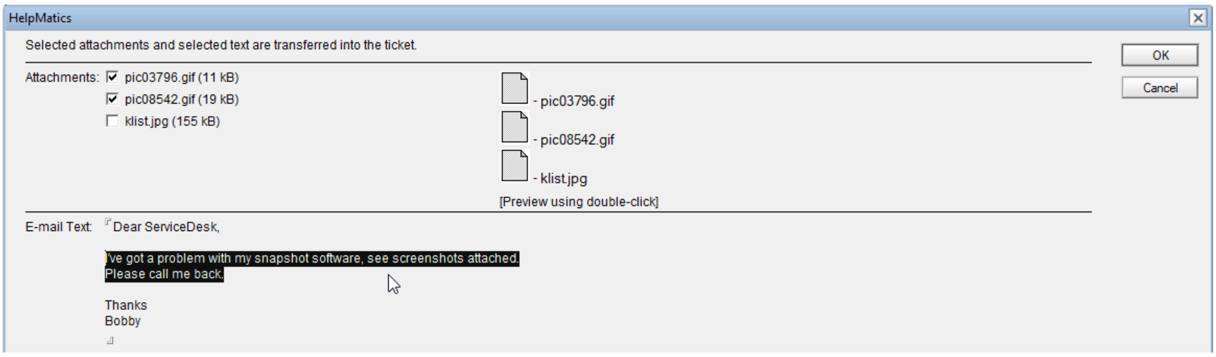


Figure 34: Selecting attachments and e-mail text

8.1.3 Reply

Via the REPLY ... button you can directly send an e-mail to the sender without creating a ticket first. If the e-mail was assigned to a ticket, the reply feature is available unless the ticket has been closed.

The  button with its EMPTY RECYCLE BIN sub-menu is available to users with deletion rights and will remove all e-mails from the recycle bin.

8.2 Automatic mail processing

With the appropriate configuration, e-mails in Mail-In can be attached automatically to tickets. This requires that the ticket ID be entered in the subject. If e-mail assignment has been activated for the client of a ticket, the e-mail will be attached to the ticket, the process editor will be informed and a flag will be set.

8.3 Recovery feature for e-mails

If, while creating a ticket on the basis of an e-mail, system incidents, such as a power failure or client crash, occur, the e-mail will first not be visible in the mail-in and the ticket might not be saved.

Via the ACTIONS -> ADMINISTRATION > RESTORE E-MAIL menu the e-mail can be recovered and put back to the mail-in, then a ticket can be created again.

If possible, the messages should be recovered soon since e-mails that are older than the month before will not be offered.

9 Knowledge Base

Clicking Knowledge Base in the Navigator will open a new window with its own Navigator (on the left) and Viewer (on the right).

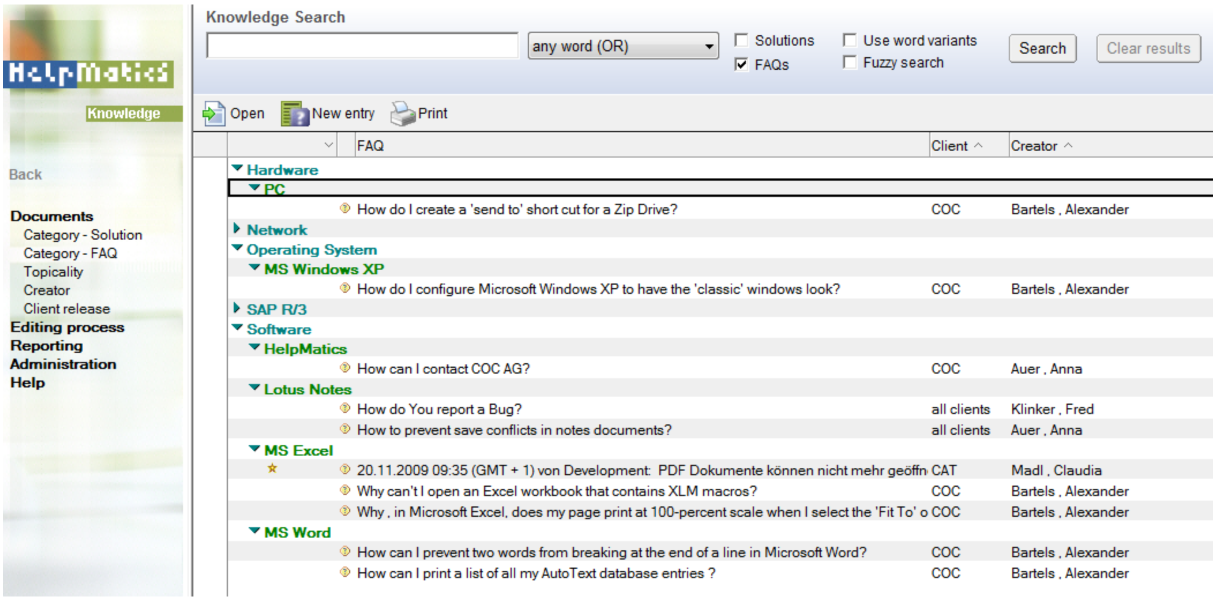


Fig. 35: Navigator (on the left) and Viewer (on the right) in the Knowledge Base

The knowledge base contains documents that have been stored in the knowledge database after the ticket processing. Moreover, new entries can be created as FAQ or solution directly in the knowledge base. Optionally, entries can be released after their editorial processing. FAQ's and solutions can be linked.

By clicking KNOWLEDGE BASE in the Navigator you open a new window with its own Navigator.

9.1 Knowledge Navigator

The Navigator allows you to select the desired information, which will then be displayed in the Viewer. Navigation is made by mouse-click.

Under Documents various knowledge document views are available. Depending on whether Knowledge Search is active (see section 9.7 Search by means of the knowledge search bar) or not, all knowledge documents or the search result will be displayed in the selected view.

9.2 Knowledge Viewer

The Viewer is displayed as main window on the right and shows the information selected in the Navigator.

By clicking the black triangle in the column titles you can change the sorting order. Categorized columns are hidden. The sorted column is marked by a black triangle . By clicking the icon again, you can restore the original state.

Double-clicking a line displays the information contained as a document.

FAQ documents are marked by the icon.

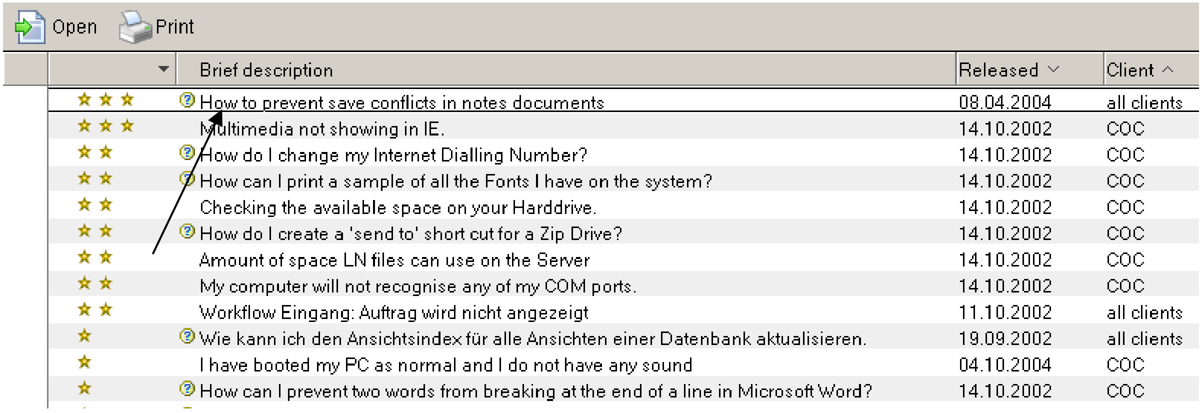


Fig. 36: Documents – Creator view sorted by relevance

Note:

If you sort the first (unlabeled) column, the documents will be sorted by relevance.

The categorization by creator will disappear.

By clicking the triangle that has become black now again in the column header, you restore the original sorting and categorization.

9.3 The action bar of the Viewer

Depending on the view selected in the Navigator, you can see different buttons on the action bar. These are used to carry out certain actions:

Icon	Meaning	Action
	Print	You can choose between: ▪ Print - View ▪ Print - Document
	New entry	Depending on the view activated, a new solution or FAQ document will be created
	Knowledge search	Opens the knowledge search bar

9.4 Icons in the views

Icon	Meaning
	FAQ document
	Document relevance. Depending on read count, use count and up-to-dateness, the document is provided with 0 to 3 stars.

9.5 Knowledge document

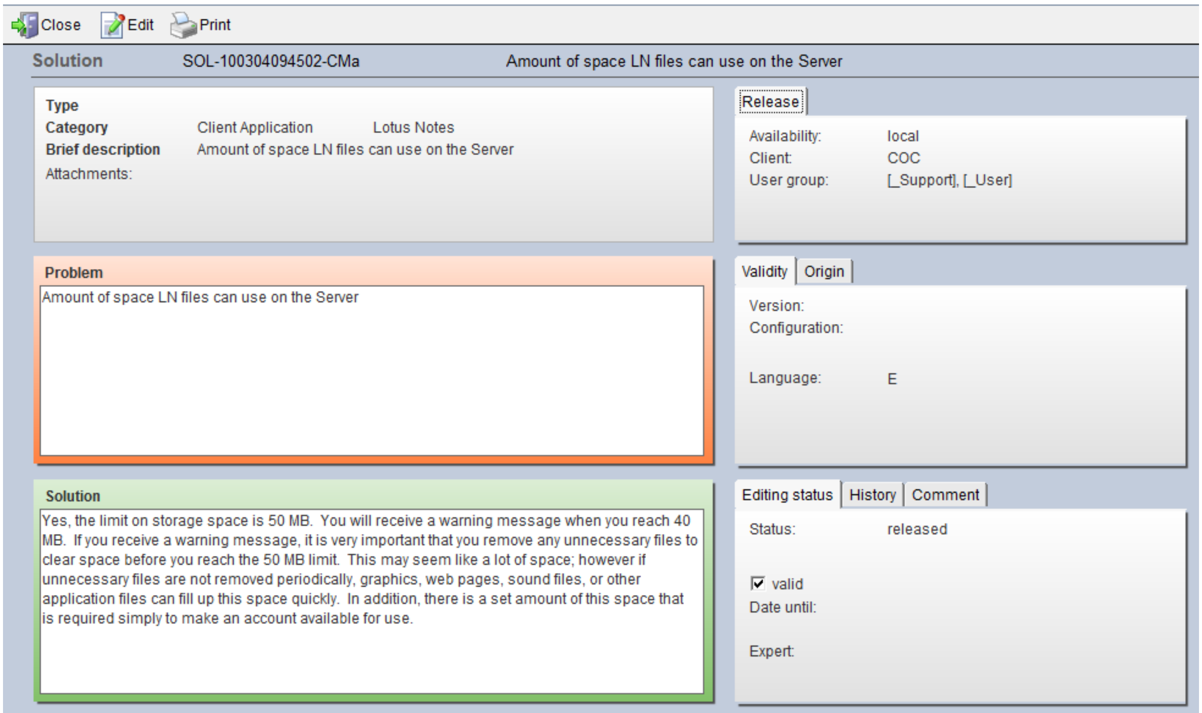


Fig. 37: Knowledge Document: Solution

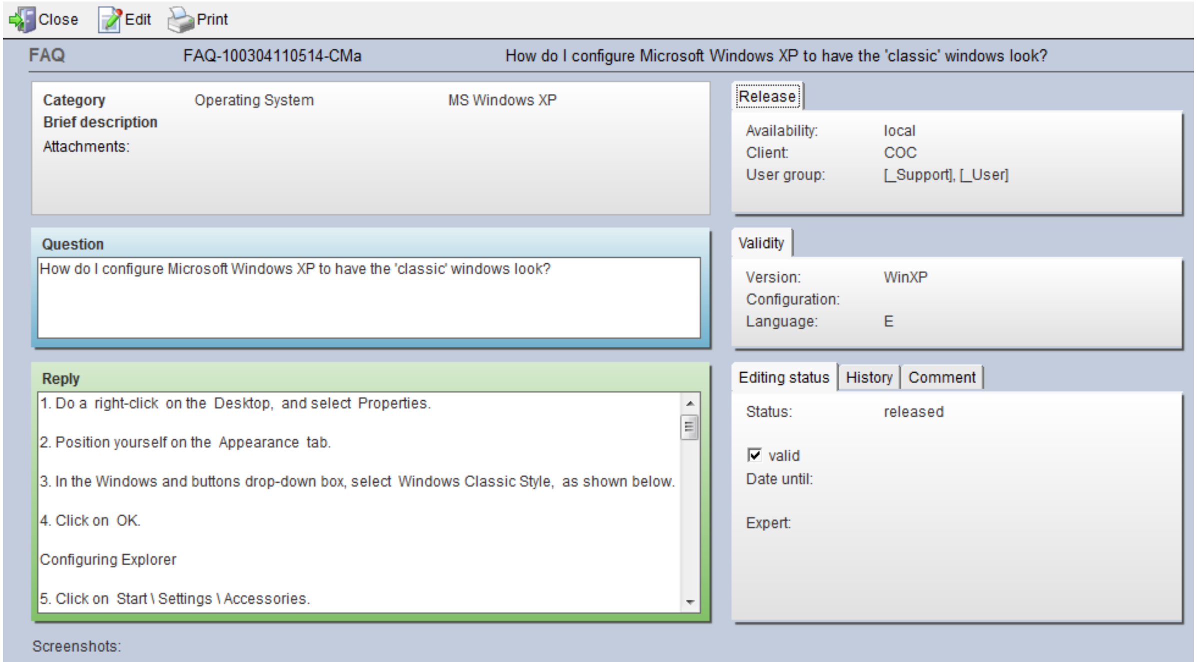


Fig. 38: Knowledge document: FAQ

Knowledge documents can be displayed under the Documents navigation item in different views:

View	Description
Category > Solution	Documents offering solutions for user tickets are arranged according to categories
Category > FAQ	FAQ documents are classified according to categories
Topicality	Solution and FAQ documents are displayed according to the year and month of their release
Creator	Solution and FAQ documents are classified according to their creator. If the document has been transferred from HelpMatics™, the process editor having closed the incident is the creator of the document (only solution documents are transferred from HelpMatics™). For documents that were created directly in the knowledge base, it is the user who created the document. In both cases, the documents may have been processed by experts (see History tab in the document).
Client release	Classification of solution and FAQ documents according to their client membership

9.6 Notes integrated search

HCL Notes provides various options of searching for documents. For further information on Notes standard functions, refer to the HCL Notes help.

9.7 Search by means of the knowledge search bar

Fig 39: Knowledge search bar

The knowledge search bar (see fig. Fig 39) offers an easy way of searching, with categorizations of the search results being maintained. You can view the search results in different sortings/categorizations by selecting the corresponding view in the Navigator. Storage of the knowledge database on an HCL Domino Server and full text indexing of the database are a precondition for an optimal functioning.

SOLUTIONS AND/OR FAQS

Decide whether the search results are to come from the solutions and/or from the FAQs area. If you change to the Category - FAQ or Category – Solution view, you automatically switch to FAQ or solution, and the search result will be restricted accordingly.

FAQ documents are identified by .

ALL WORDS (AND)

Enter the individual words by separating them with blanks. Notes will search for documents containing all words specified.

ANY WORD (OR)

Enter the individual words into the search field by separating them with blanks. Notes will search for documents containing one of the words specified.

9.8 Editing process

Users with manager or expert roles have access to the editorial section of the knowledge base. Here entries (tickets from HelpMatics™ ServiceDesk or new solutions created in the knowledge base and FAQs) are prepared and released for certain user groups (roles).

Depending on the role, the following views are available in the editing area:

View	Description
Editing status	Here you find all non-released entries (solutions and FAQs), categorized as follows: ▪ NEW Includes marked requests from ServiceDesk (after preparation by an agent) and new solution and FAQ documents. ▪ ASSIGNED - EXPERT These documents have been assigned to an expert or an expert group for editing. This can be done by a manager or by an agent on the basis of the categories entered. ▪ CHECKED - OK Here documents checked by experts and waiting for release by the manager are collected ▪ CHECKED - DENIED Here all entries are collected that were denied or rejected by the expert. The manager can delete them or assign them to another expert.
Expert (my own)	Here, an expert will find the documents assigned to him/her for editing.

Manager (my own)	Here the knowledge manager will find all documents that have been newly created or returned by the expert as well as documents the validity of which has expired.

There are three types of editorial workflow:

COMPLETE EDITORIAL WORKFLOW

Each document is assigned to an expert by the manager or, automatically, based on its category. The expert revises and processes the document, adds information and returns it to the manager as Denied or OK. The manager particularly checks the setting of the client as well as (in the Enterprise setup only) of the availability and releases the document for certain user groups or – in case of denied entries – deletes the document or assigns it to another expert (see appendices 15.1.1 and 15.1.2).

MINIMUM EDITORIAL WORKFLOW

The manager releases documents directly – without experts being involved. The following settings should not be activated under Administration - Modules: “*Import expert data*” and “*Automatic assignment of experts”* (see appendix 15.1.3).

BYPASSING THE EDITORIAL WORKFLOW

Documents are released for all user groups without editorial processing. This requires the setting "*Avoid editorial workflow*" under Administration – Modules. If this option has been activated, a further option is available: “...*but consider restriction to client.”* If this setting has been activated, the multi-client capability is maintained (see appendix 15.1.4).

9.9 Knowledge manager – tasks

The manager is responsible for the editorial processing of knowledge documents and for deleting irrelevant documents from the database.

The following buttons are available on the action bar of the solution and FAQ document:

Action	Description
Assign > Expert …	The manager can specify which expert shall edit a document. By selecting an expert from the list, the manager forwards the document to this expert.
Assign > Experts group …	Instead of assigning a document directly to an expert, the manager may also define an experts group. Every member of the group can then take over the document for editing.
Assign > Back to expert	If a document has been returned by the expert to the manager as Checked – OK or Checked – Denied, the manager can return the document to the same expert again if the editing process has not been performed to the manager’s satisfaction. The manager is then requested to make a comment, which is to be entered in the Comment tab of the editing status.
Release	The manager releases the document – usually after it has been edited by an expert – for certain user groups. Before that, the following field contents in the release tab are to be checked in particular: ▪ Availability (Enterprise setup only): Is the document to be released only in the current instance of the knowledge base or is it to be edited in the global knowledge base? ▪ Client: The document may be restricted to a client or may be valid for all clients (selection: _all).

9.10 The expert's tasks

The expert is responsible for supplementing and editing knowledge documents. He/she makes sure that the information in a document is complete, clear and correct.

The action bar of the solution and FAQ document has the following entries:

Action	Description
Forward to Manager – Checked > OK	With this function the expert confirms that the document is ready for release and returns it to the manager.
Forward to Manager – Checked - denied	The expert returns the document to the manager without having edited it if e.g. the subject is not his responsibility. The expert is then requested to make a comment, which is entered in the Comment tab of the editing status.

9.11 Availability of knowledge documents

ENTERPRISE:

Via the Enterprise setup, knowledge documents that are characterized as global in the availability field will be distributed to all knowledge base instances company-wide.

If, in a local instance, the availability of a knowledge document is set to global, it will be removed from this instance and integrated into the editorial workflow of the global knowledge base instance: The knowledge manager of the global knowledge base instance can decide on the further procedure of the document.

A document that has been provided with "global" availability in the global knowledge base instance and that has been released will be distributed to all knowledge base instances company-wide.

10 Info management

10.1 Functionality

The Info Management can be used for various purposes. The display of current messages via the info board is only one possible field of application.

Further applications:

- Providing current messages via the info board or via the HelpMatics™ portal (e.g. important information for all support team members, or on failures, changes); pre-scheduling of messages. Select under Medium where the info is to be displayed.
- Documentation of incidents
- Basic change management
- Storage and exchange of documents, processes or other information to be distributed in support
- Connection to the Intranet for messages to the users
- Connection to master tickets (see 4.9)

10.2 InfoDisplay

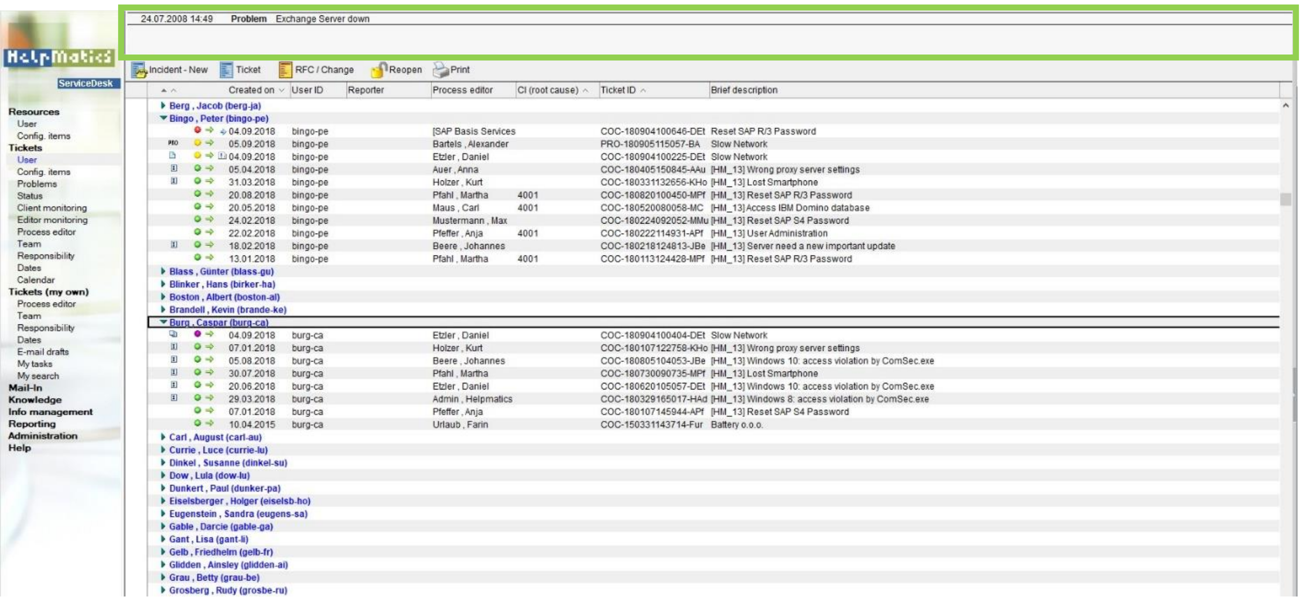


Fig. 40: Position of the info display

Via the info board information is displayed quickly and timely. The VALID FROM DATE, the type and the info-text are displayed.

After clicking Info Management in the navigator, the associated window opens, and, by clicking the INFO - NEW button, you can create new info.

To show information in the info board it is necessary to activate the SHOW IN INFO DISPLAY option. The entries will be sorted by Priority and start of validity (Valid from / in descending order).

Additionally, info can be released for the portal (SHOW IN PORTAL).

HelpMatics™ divides the stored information and documentation into three categories: Problem, Info and Change. Other categories can be created, if necessary.

You open an entry selected in the view with EDIT or by double-clicking it in order to change it.

ENTERPRISE:
Info documents can be provided with Local or Global availability. It is not possible to downgrade the availability from Global to Local.

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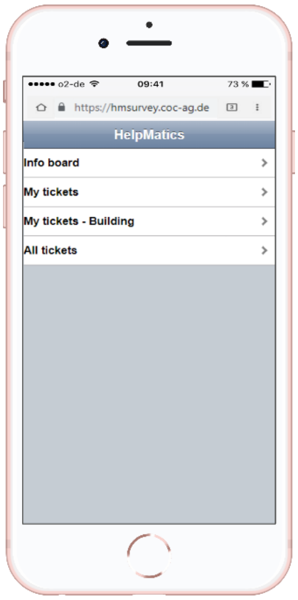
11 HelpMatics™ for mobile devices



The new version not only provides a completely revised HelpMatics™ web client but also an optimized interface for mobile devices.

The main focus has been on editing Incidents and Problems.

Moreover, you have access to the current messages of the HelpMatics™ Info Board.

The mobile interface is not limited to special devices but allows mobile access to HelpMatics™ ServiceDesk for all browser enabled devices.

11.1 Initial screen - overview

The initial screen shows the following menu items:

- Info board
- My tickets
- My tickets - building
- All tickets

11.2 Info board

The Info board corresponds to the info display of the HelpMatics™ ServiceDesk database in the Notes client. It shows all current information, incidents or master tickets.

11.3 My tickets

This overviews shows all tickets for which the currently logged in person is process editor or member of a process team. The tickets are categorized by process editor or process team. The following ticket information is shown:

- brief description
- represented by icons: Deadline, master/sub-ticket, status, priority, forwarding
- date of creation
- name of the user assigned

11.4 My tickets - building

This overview contains the same data as MY TICKETS, however with a different categorization. Here the tickets are categorized by building (corresponds to user data in the ticket, reg. details - building).

11.5 All tickets

This overview contains all tickets sorted by creation date. This overview also allows you to conduct a search.

11.6 Ticket processing

Having selected a ticket you will get an overview of selected ticket data. Click on EDIT to shift to the edit mode. This function will be available if you have the appropriate rights.

The following data can be edited:

- brief description
- Request, solution and editing
  Scroll through these three data fields by clicking the prefixed +. To add information, click New entry.
- Process editor
  Click WORKFLOW and then PROCESS EDITOR OR TEAM to forward the ticket.

The following data will be displayed for information and cannot be edited:

- Classification: Status, priority, type, root cause and category
- User: Name, phone, location
  CI (root cause): Name, category, network/IP address
- Responsibility: Responsible person/team incl. phone No., process editor incl. phone No.

Having edited the ticket, save the changes you made via the SAVE button.

12 HelpMatics™ Widgets

12.1 HelpMatics™ One-Click Ticket

Only one mouse click is necessary for the creation of a ticket when you use the HELPMATICS™ ONE-CLICK TICKET widget.

The creation of tickets is based on using master tickets. After the appropriate documents (user, config items to user) and the master ticket itself have been selected, a sub-ticket will be created based on this selection.

12.1.1 Installation

Refer to the HelpMatics™ Admin documentation for the installation requirements and installation notes.

12.1.2 Structure of the widget

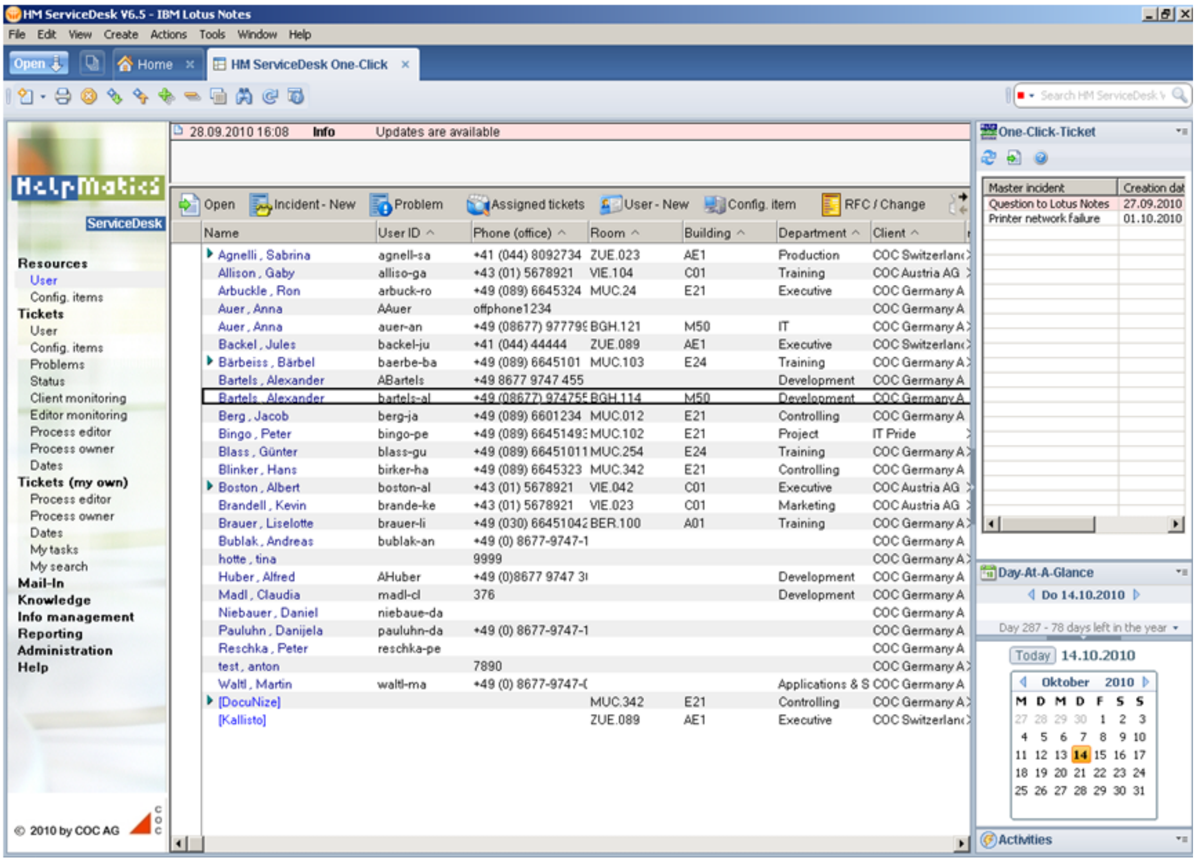
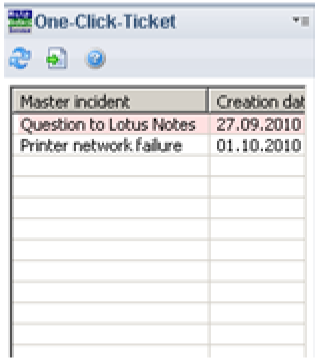


Fig. 41: HelpMatics one-click ticket widget



The widget is shown on the right sidebar as soon as one of the HelpMatics™ views has been opened.

All master tickets are shown in chronological order. The entries backed in light red are master tickets for which information is available.

The menu bar offers two actions:

- Refresh of the master ticket display
- Opening of the master ticket currently selected

12.1.3 Creation of sub-tickets

The following actions are required for the creation of sub-tickets:

- Change to the resources/user view. Select the user a ticket shall be created for. . It is also possible to select a config. item assigned to a user.
- On the one-click-ticket widget on the right sidebar: Double-click the respective master entry.

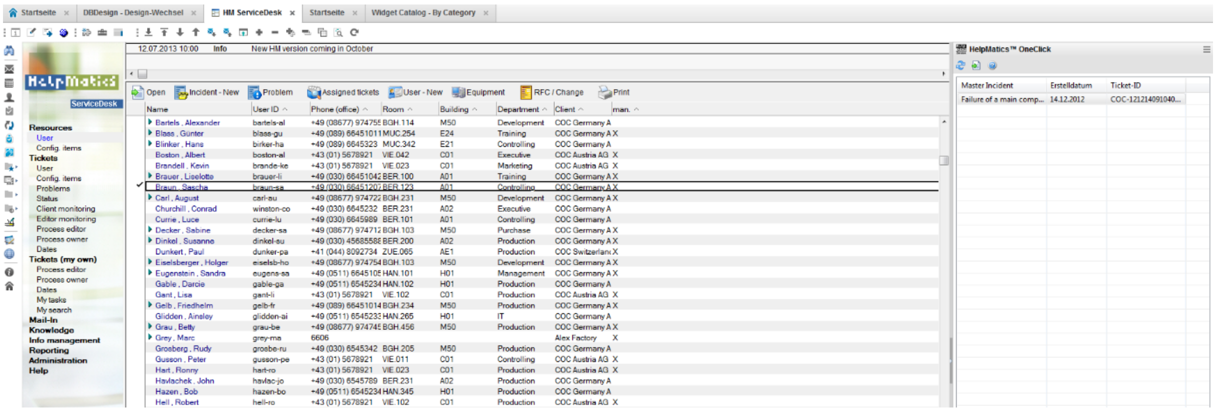


Fig. 42: Creation of a ticket concerning a selected user

The data of the selected user will now be used for creating a sub-ticket for the master clicked on. The link to the newly created sub-ticket, the time of creation and, if required, a note concerning an e-mail address that has not been stored will be displayed on the status bar.

12.2 HelpMatics™ FastText

HelpMatics™ FastText is a widget that provides configurable text modules in the HCL Notes sidebar. Ticket processing by using text modules will reduce process time and improve ticket quality.

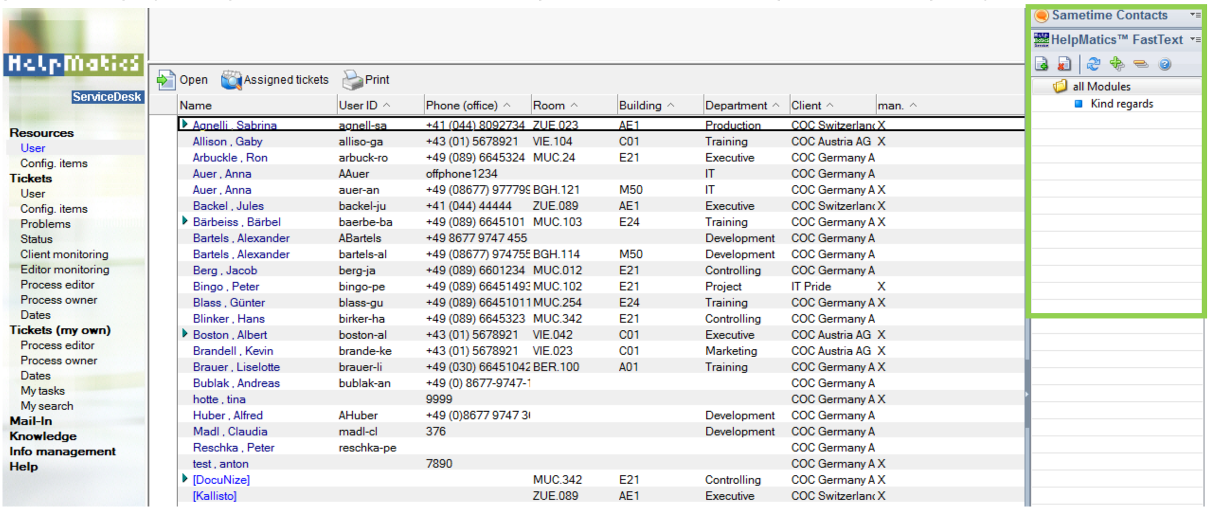


Fig. 43: HelpMatics™ ServiceDesk with FastText widget in the sidebar

For system requirements and configuration, refer to the HelpMatics™ Administrator manual.

You drag a text module into a text field via drag & drop. The modules may be used e.g. in the process or solution field of the ticket or in the description or edit fields of RFC, change or task.

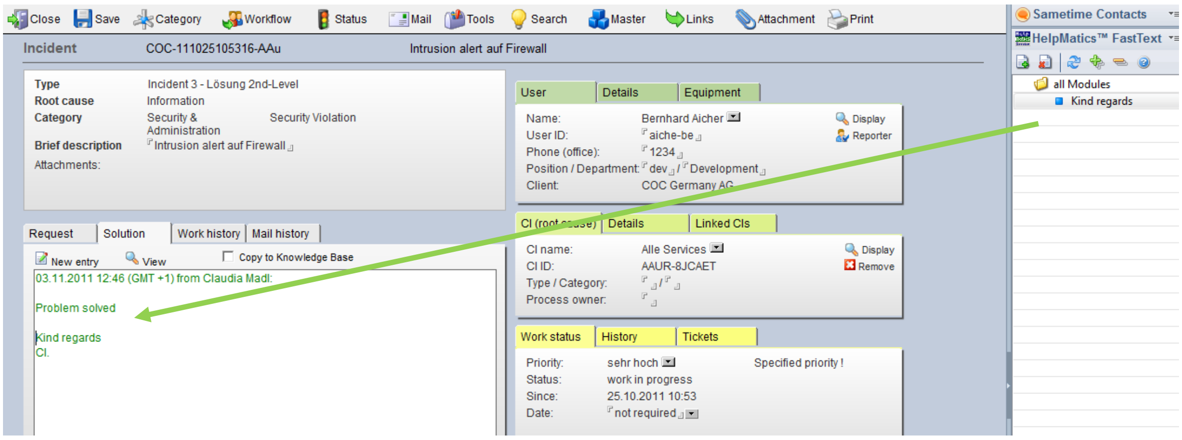
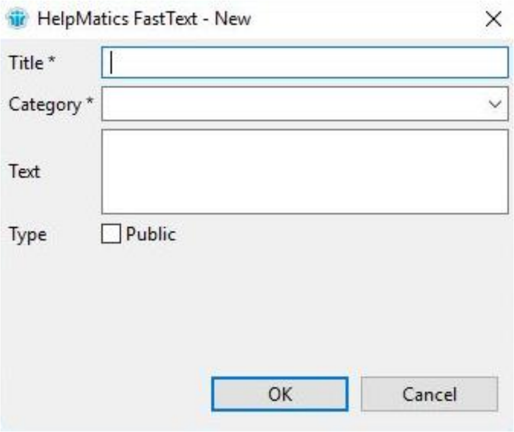


Fig. 44: Dragging modules into the ticket via drag & drop

You differentiate between public and private text modules.

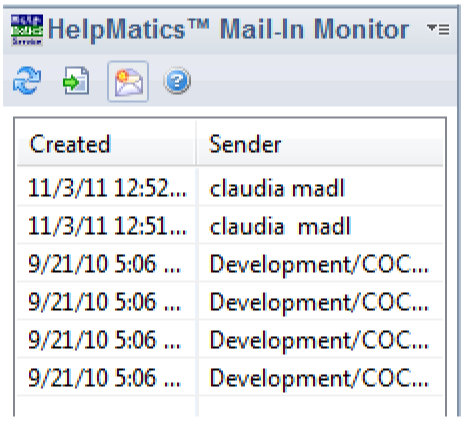


- Public text modules are defined centrally by an authorized person. These text modules are available to every process editor. When a text module is created or edited, Public is selected.

- Additionally, every process editor can create personal (private) text modules. These are only visible to the respective process editor. It is not possible to define a special type for a private text module.

The entries can be managed and updated via the menu or context menu. The individual text modules will be categorized according to the respective HelpMatics™ modules (ServiceDesk, Change, …).

12.3 HelpMatics™ Mail-In Monitor



The Mail-In Monitor visualizes the HelpMatics™ Mail-In area and informs the user about incoming e-mails. This widget will be available after the installation whether the HelpMatics™ ServiceDesk database is open or not.

For system requirements and configuration, refer to the HelpMatics™ Administrator manual.

The Mail-In Monitor is located on the HCL Notes sidebar and, depending on its width, displays information on sender, recipient, date and subject.

The following functions are available:

- Refresh 
- Open mail 
- Monitoring on/off 
- Help 

Depending on the configuration, a popup may inform the user about incoming e-mails.

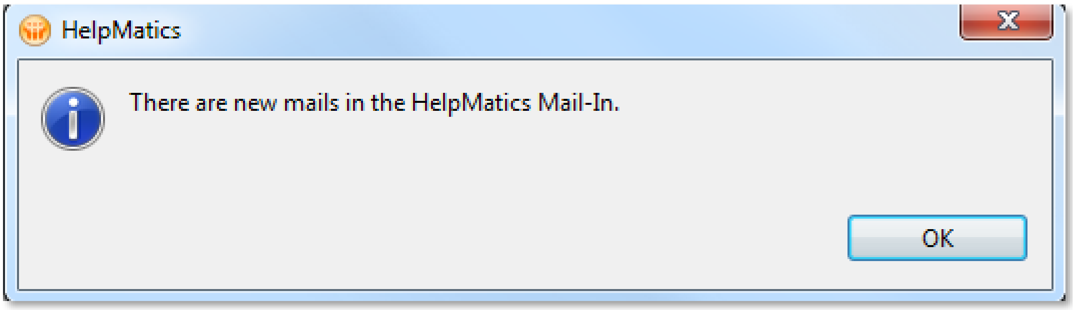


Fig. 45: Info popup on incoming e-mail

13 User tips

13.1 Retain view column sorting

If column sorting is to be retained in the views, the retain view column sorting option can be activated in the user preferences (see Fig 46).

To do so, in the FILE > PREFERENCES menu, open the USER PREFERENCES and activate under BASICS NOTES CLIENT CONFIGURATION > ADDITIONAL OPTIONS the option RETAIN VIEW COLUMN SORTING.

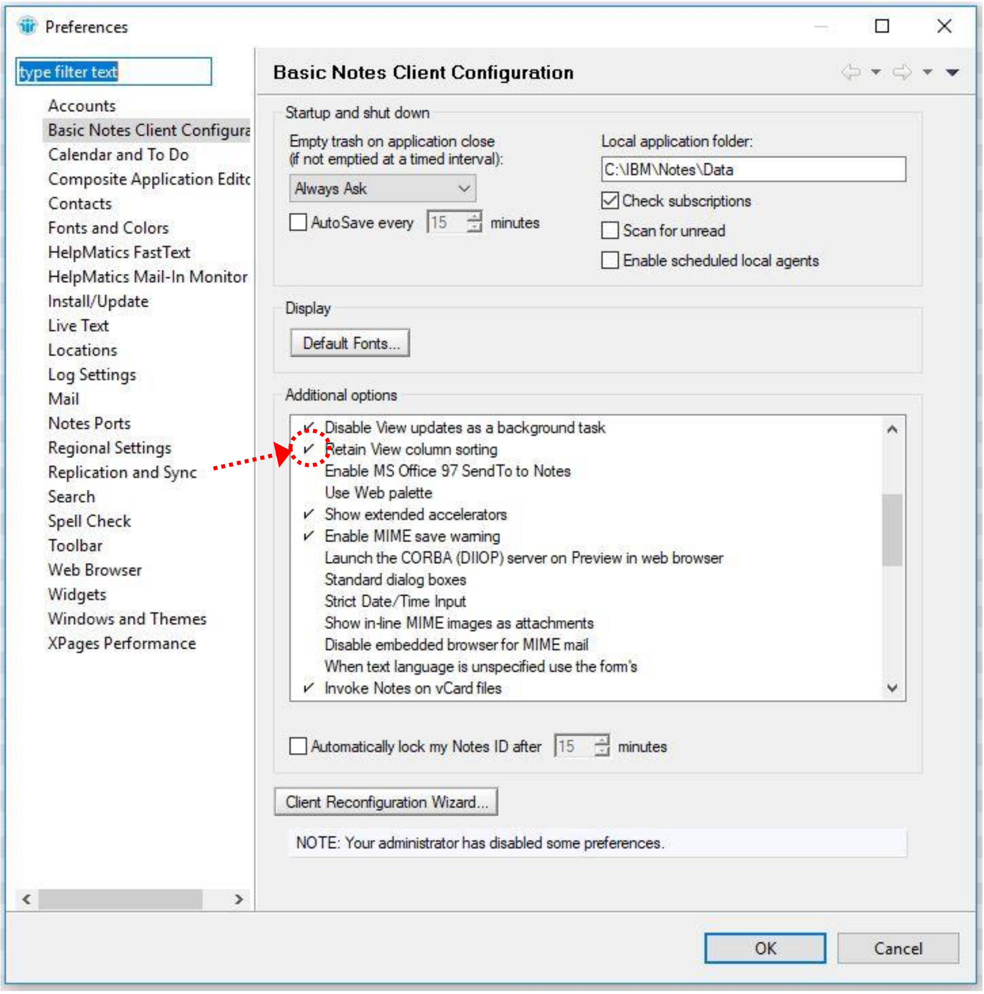
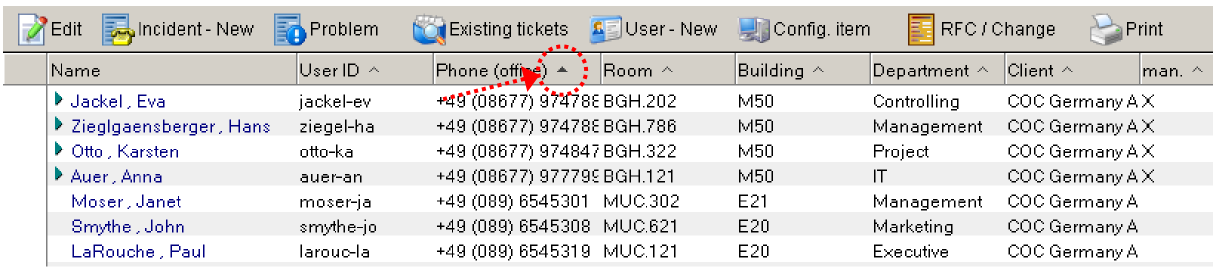


Fig 46: File > Preferences > User preferences

By doing so, the column sorting which you made by clicking the ^ character in the column title are retained until you click the column title again or activate another column sorting, even upon leaving the program.

The sorted column can be identified by the ▲ icon in the column title.



Name	User ID ^	Phone (office) ▲	Room ^	Building ^	Department ^	Client ^	man. ^
Jackel , Eva	jackel-ev	+49 (08677) 97478	BGH.202	M50	Controlling	COC Germany A	X
Zieglgaensberger , Hans	ziegel-ha	+49 (08677) 97478	BGH.786	M50	Management	COC Germany A	X
Otto , Karsten	otto-ka	+49 (08677) 974847	BGH.322	M50	Project	COC Germany A	X
Auer , Anna	auer-an	+49 (08677) 97779	BGH.121	M50	IT	COC Germany A	X
Moser , Janet	moser-ja	+49 (089) 6545301	MUC.302	E21	Management	COC Germany A	
Smythe , John	smythe-jo	+49 (089) 6545308	MUC.621	E20	Marketing	COC Germany A	
LaRouche , Paul	larouc-la	+49 (089) 6545319	MUC.121	E20	Executive	COC Germany A	

Fig. 47: Resources > User sorted by phone (office) view

13.2 Deactivate categorization by clients

Many views such as TICKETS > USER (see Fig 48 and Fig 49) start with categorization by clients. Often, this information is not required in the particular view. If you made the settings according to tip 1, you may activate and deactivate them. Click the first icon in the title line to show or hide the categorization. The icon changes into a black triangle () and you get to the next categorization column (in the TICKETS > USER example the column showing the user names).

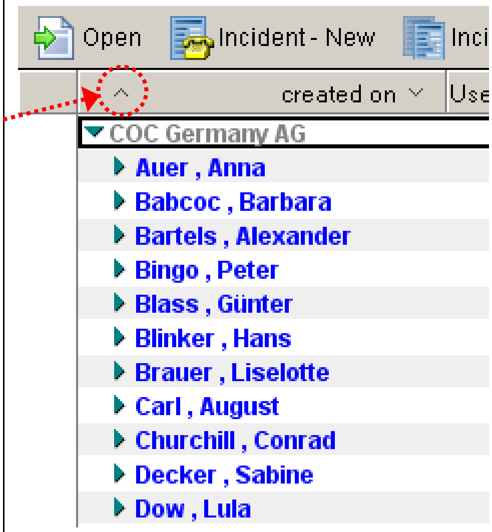


Fig 48: Tickets > User (standard sorting) view

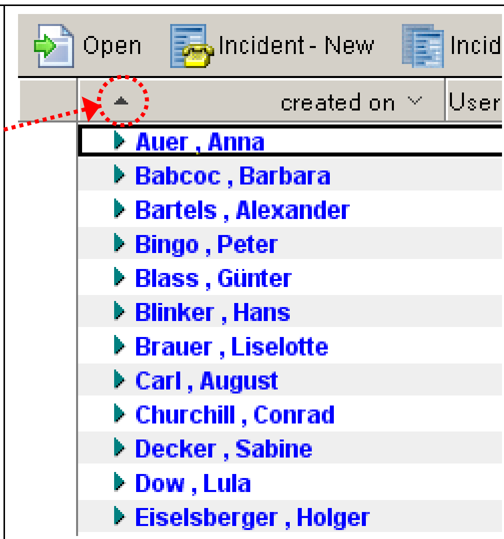


Fig 49: Tickets > User view (sorted by user name; client hidden)

Advantages:

- The speed of displaying the view will be increased.
- The Notes quick search can be performed via the column that has been sorted (the user names column in the TICKETS > USER example)

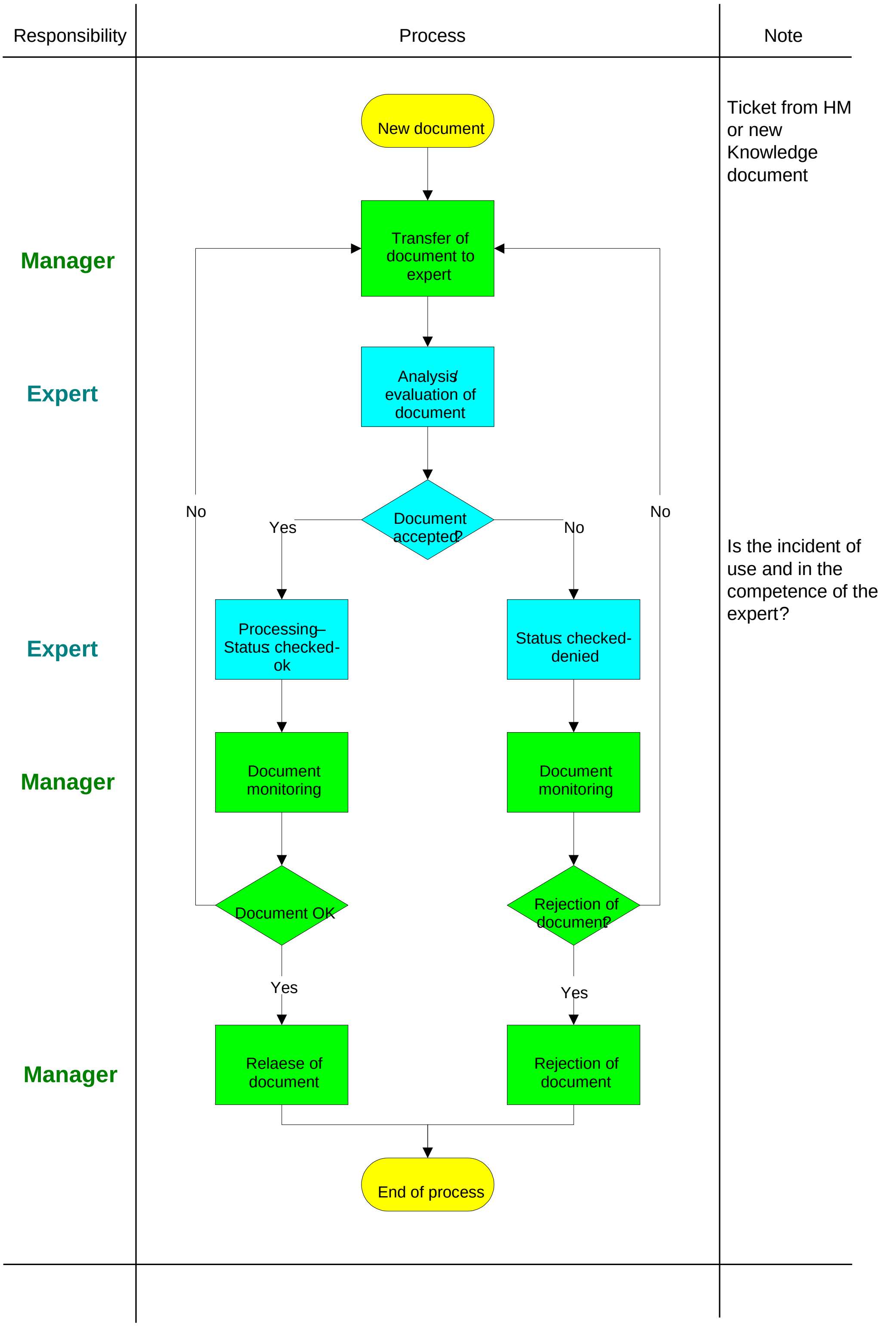
14 Glossary

Navigator	left sub-pane of the HelpMatics™ interface, where the primary navigation takes place
Action bar	bar in the HelpMatics™ interface, where different action buttons are displayed
Viewer	right sub-pane of the HelpMatics™ interface, where information is displayed
Resources	data sets the ticket creation is based upon, e.g. all configuration items and the users
Rapid Recorder	for recording all data necessary for further processing a ticket
Ticket	independent task / request by a user recorded by the ServiceDesk tool
Knowledge Base	knowledge base where frequently occurring requests and their solutions as well as FAQs can be categorized and stored
Knowledge Document	solution or FAQ document
FAQ	abbreviation for Frequently Asked Question
Solution	either a ticket marked in HelpMatics™ for the knowledge base and transferred into the knowledge base or a solution document newly created in the knowledge base
Roles	group within the database for controlling access rights
SLA	abbreviation for Service Level Agreement

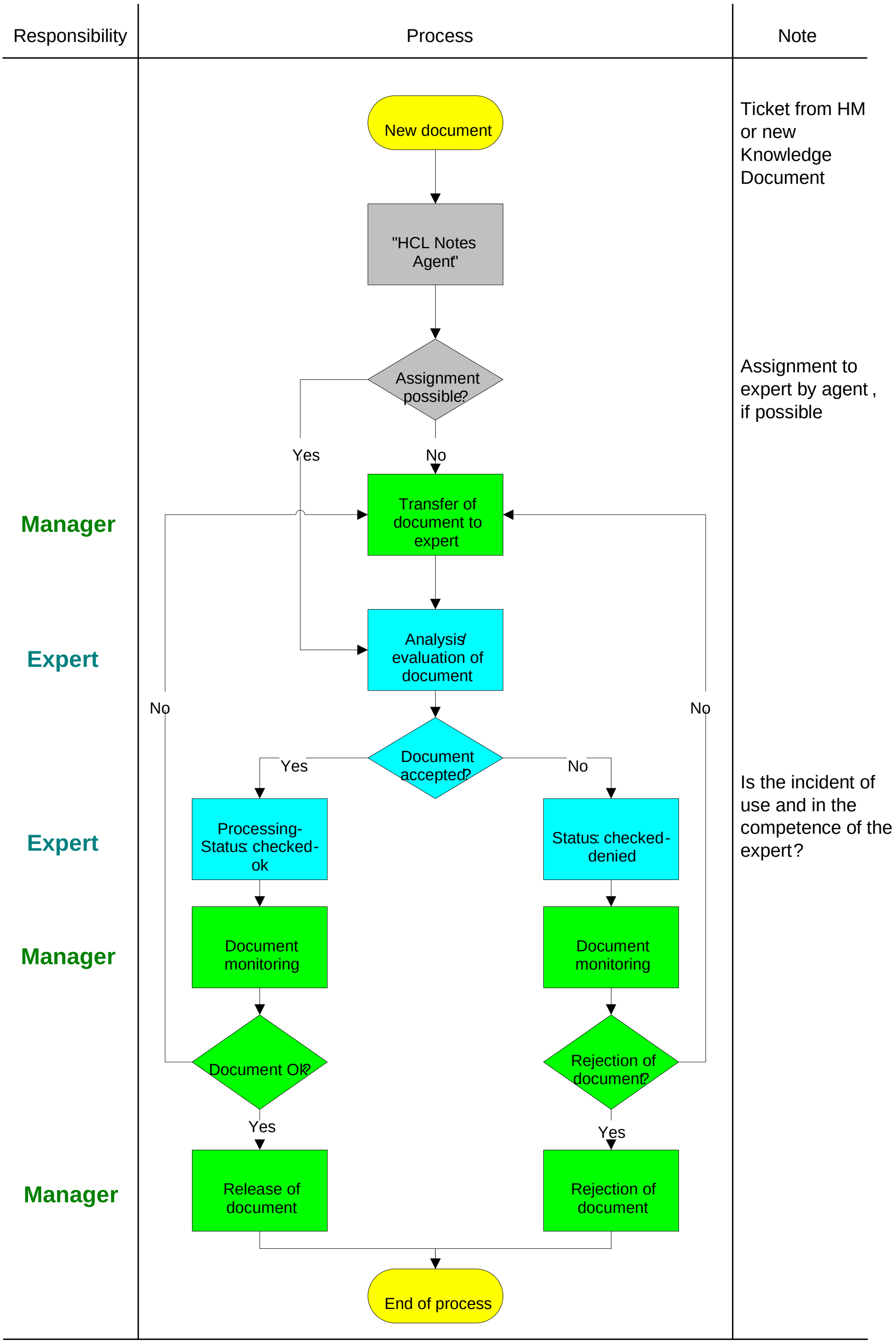
15 Appendix

15.1 Knowledge

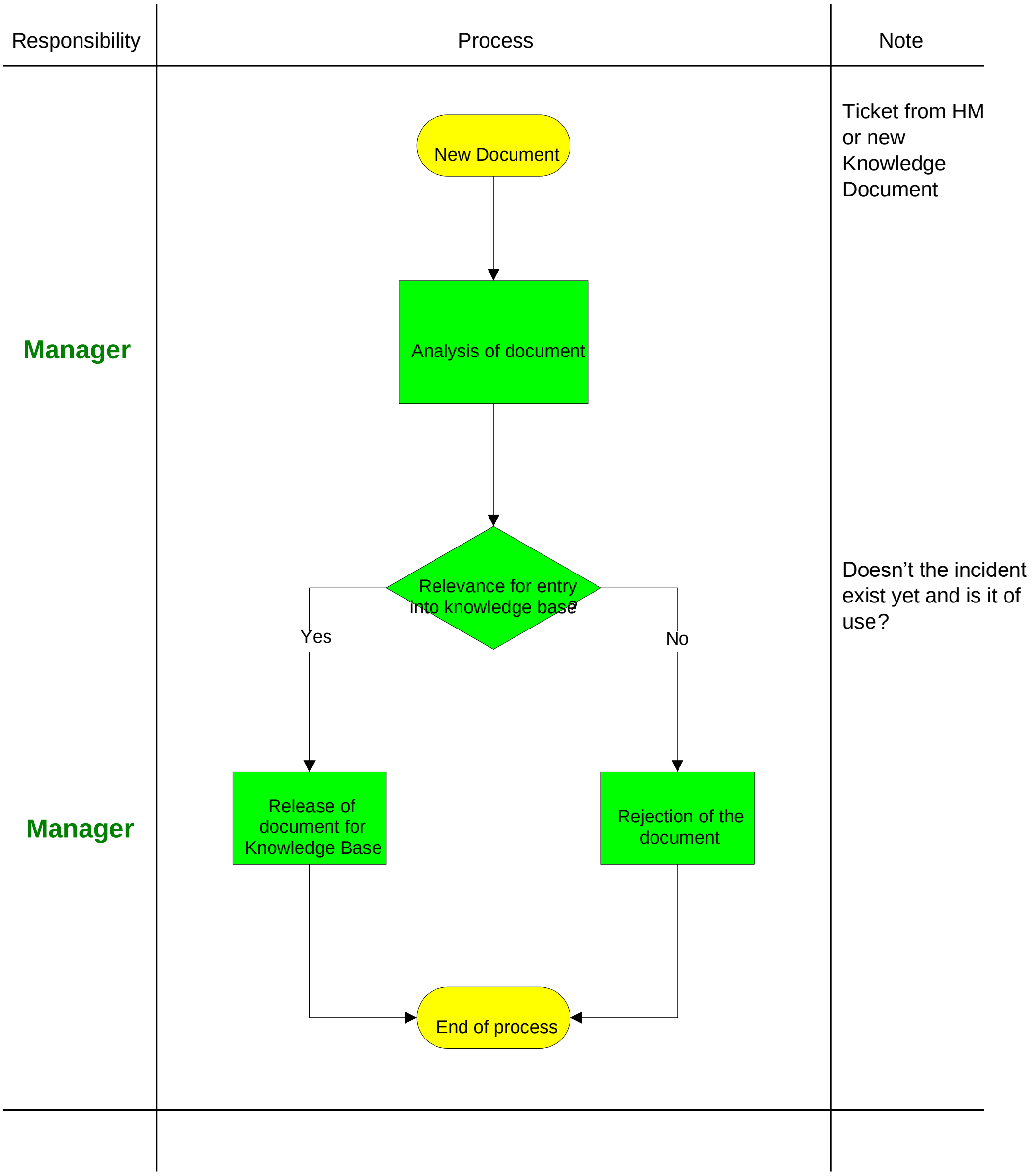
15.1.1 Complete editorial workflow



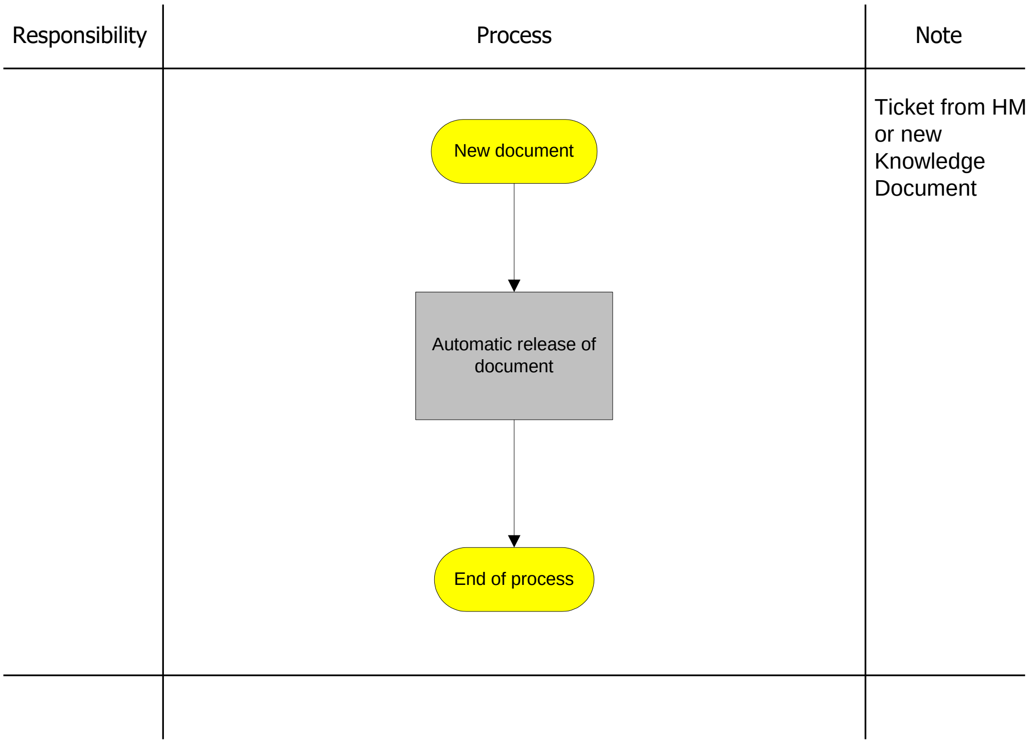
15.1.2 Complete editorial workflow with automatic assignment



15.1.3 Minimum editorial workflow



15.1.4 Bypassing the editorial workflow



16 Imprint

COC AG
Product Management HelpMatics™

Gewerbepark Lindach A 12
84489 Burghausen
Germany

Telephone: +49 (0)8677 / 9747 - 0
fax: +49 (0)8677 / 9747 - 199

E-mail: info@coc-ag.de
Internet: www.helpmatics.com