HEAT® 6.0
Call Logging at a Glance

HEAT® SOS
SERVICE OPTIMIZATION SOLUTIONS™

(US/August 2000)

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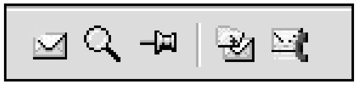

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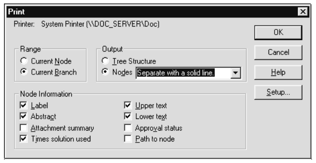

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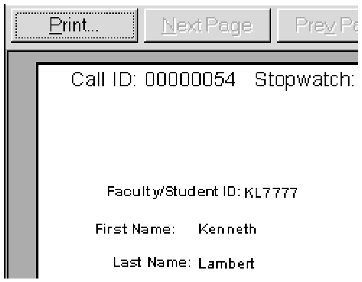

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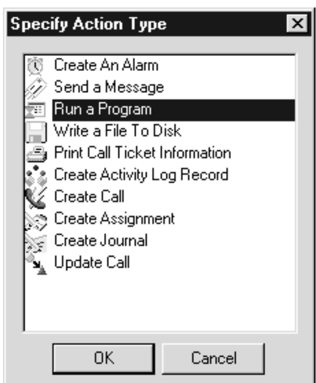

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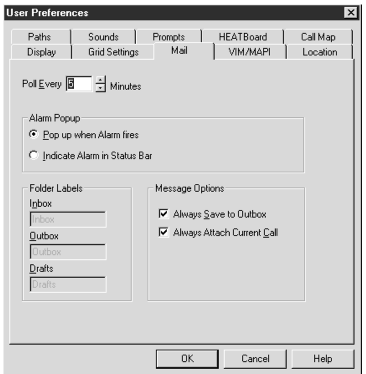

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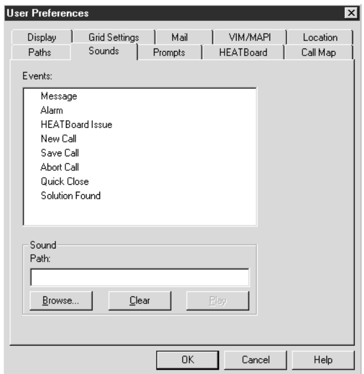

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1

About This Book

IN THIS CHAPTER

We, at GoldMine Software Corporation, have a rich heritage of commitment and service to the Help Desk and Support Management Center industries. Our founder, Ron Muns, is also the founder of the Help Desk Institute. So, we like to think of ourselves as the pioneers in Help Desk and Support Management Center automation.

We now lead the industry with the HEAT product. HEAT is a 100-percent customizable system for automated call tracking, problem resolution and management, messaging, reporting and trend tracking.

Call Logging is the heart of HEAT. It provides you with the tools you need to log and track your calls and resolve them quickly. To assist you in learning about Call Logging as quickly and comfortably as possible, we have developed the Call Logging *At a Glance* manual. Chapters are broken out by function, and tasks are broken down into small, easy-to-absorb chunks. Each task is laid out step-by-step with a corresponding Call Logging graphic image.

How Call Logging *At a Glance* is Organized

Chapter 1

About This Book

This chapter provides an orientation to the Call Logging *At a Glance* manual, as well as Call Logging terminology.

Chapter 2

Call Logging

The Call Logging chapter shows you how to launch Call Logging, discusses each element of the Call Logging window, and defines the terms used when logging a call.

Chapter 3

Customer Records

The Customer Records chapter discusses the different types of Customer Records: Profile, Contacts, Configuration, and Call History.

Chapter 4

Call Groups

The Call Groups chapter discusses both Call Groups and Hot Lists, a specialized type of Call Group. Call Groups provide a way of organizing and searching for Call Records.

Chapter 5

Finding Information

Finding Information shows you how to generate both simple and complex searches.

Chapter 6

First Level Support

The First Level Support (FLS) chapter shows you how to use the HEAT knowledge-base tool.

Chapter 7

Reports

This chapter discusses reports that you can generate through Call Logging and Crystal Reports, as well as management reports using the HEAT Answer Wizard.

Chapter 8

AutoTask

AutoTask explains how to automate certain tasks in HEAT. Many of the Call Logging functions can be set up to execute with the click of a button.

Chapter 9

Sharing Information

The Sharing Information chapter discusses how to use Alert Monitor and SupportMail.

Chapter 10

User Preferences

The User Preferences chapter explains how you can customize Call Logging for your workstation.

Appendices

See the appendices for a listing of Call Logging keyboard shortcuts.

Customized Call Logging Windows

Virtually every aspect of HEAT can be custom tailored to meet your organization's needs. That means the Call Logging graphic images in the Call Logging *At a Glance* manual may be a little different from yours, but the general idea is the same.

Users, Roles, and Teams

Throughout this manual you will notice that we talk about users, roles, and teams. Here are brief definitions:

- A **user** is a person who works in the HEAT system. The System Administrator creates a user profile for each user and can edit and delete users.
- A **role** is a user's function in the HEAT system. Each user has one and only one role. Several users can have the same role. The role determines the user's security rights for each area of the HEAT system. Examples of roles include Tracker, Manager, Screener, and Team Lead. The system administrator can create, edit, and delete roles, and assign a role to each user.
- A **team** is a collection of one or more users who work on a common project, or toward a common goal. Examples of teams include Network Support, First Shift, and Hardware Technicians. A user may be on one or more teams, or no team. The system administrator can create, edit, and delete team descriptions, and assign users to teams.

Other HEAT Documentation Resources

- HEAT Admin Modules Manual
- HEAT Install Guide
- HEAT Modules Manual
- HEAT Managers Tools
- iHEAT
- HEAT Self Service

2

Call Logging

IN THIS CHAPTER

This chapter explains the tools and processes of Call Logging. It shows you how to launch Call Logging, discusses each element of the Call Logging screen, including how to customize your own toolbar, and defines the terms used when logging a call.

You will learn how to create a new Call Record, log the basic information of a call, and use the Detail, Assignment, and Journal screens.

You will also learn how to assign a call to a technician and how to use the Call Map feature to track overdue assignments.

This chapter also shows you how to use the HEATBoard to increase the visibility of critical issues.You can also send a customized Information Query from Auto Ticket Generator to Call Logging for specific Call Record information.

Important Terms in Call Logging

HEAT

The HEAT Module. Call Logging is part of the HEAT Module.

Customer Type

Customer Type is a category in Call Logging that identifies a type of customer.

- **Organizations:** Companies who are supported by the support center.
- **People:** Customers or end users who are supported by the support center.
- **Equipment:** Equipment supported by the support center.

Call Record (also called a Call Ticket)

A Call Record is information about a specific call. A new Call Record is opened when a new call comes into the support center. A Call Record contains Profile information, as well as information on the four Call Logging tab screens: Call Log, Detail, Assignment and Journal.

The Profile Subset

The Profile Subset appears at the top of each Call Record and displays selected customer information, such as company name and telephone number of the caller.

Call ID Number

The Call ID Number is a unique system-generated number that identifies each Call Record. HEAT assigns the Call ID Number when a new Call Record is opened.

Customer Record

A Customer Record is a collection of information about a customer.

Customer ID

A Customer ID is a numeric or alpha-numeric combination that your system administrator designs to uniquely identify customers. It ties all of the elements of a Customer Record together and is the link between the Customer Record and that customer's Call Records.

Call Groups

The HEAT system displays Call Records in Call Groups. All Call Records in a Call Group have similar characteristics. For example, if you queried the HEAT system to show all Call Records that have an Open Call Status, the result would be a group containing all the open records. The Work Group is a special Call Group containing all the calls you have created, modified or selected in the current HEAT session.

Hot Lists

A Hot List is a special kind of Call Group. The Call Records in a Hot List do not necessarily have any common characteristics. Call Records are manually added to a Hot List.

Validated Fields

When a field is validated, you can select information from a list of values. If the information you want is not displayed, you can, in some cases, type the appropriate information into the field. This is called Helpful Validation. Not all fields are available for Helpful Validation.

Launching Call Logging

To log into Call Logging, you must have access rights. You must also select a SQL data source. See your system administrator for access rights and a data source.

TIP

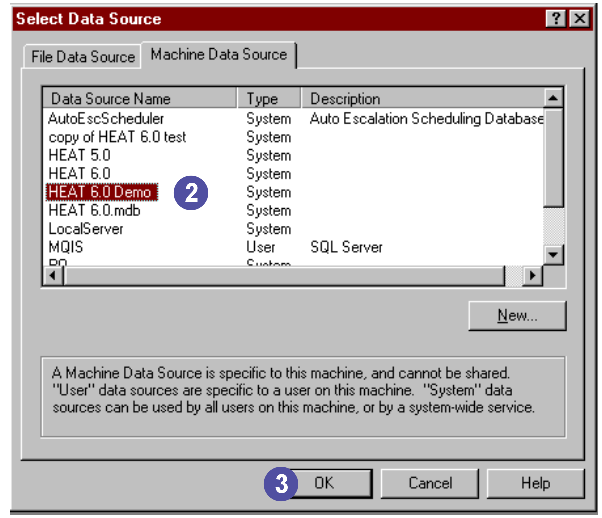
*You can set a data source to load automatically when you launch Call Logging. Check the appropriate box the first time you log on, or select **User Preferences>>Location** from the File menu.*

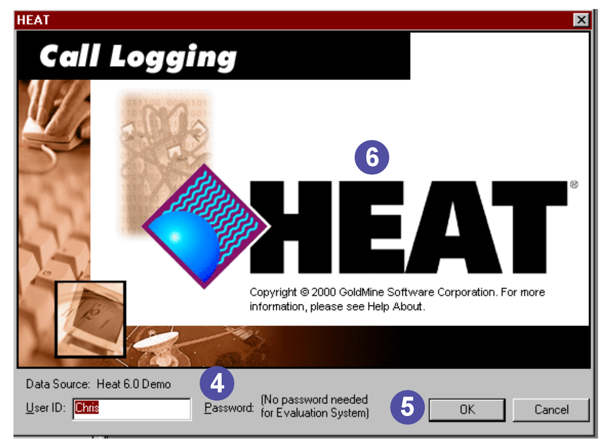
SEE ALSO

Setting the Default Data Source in "User Preferences," Chapter 10.

Launch Call Logging

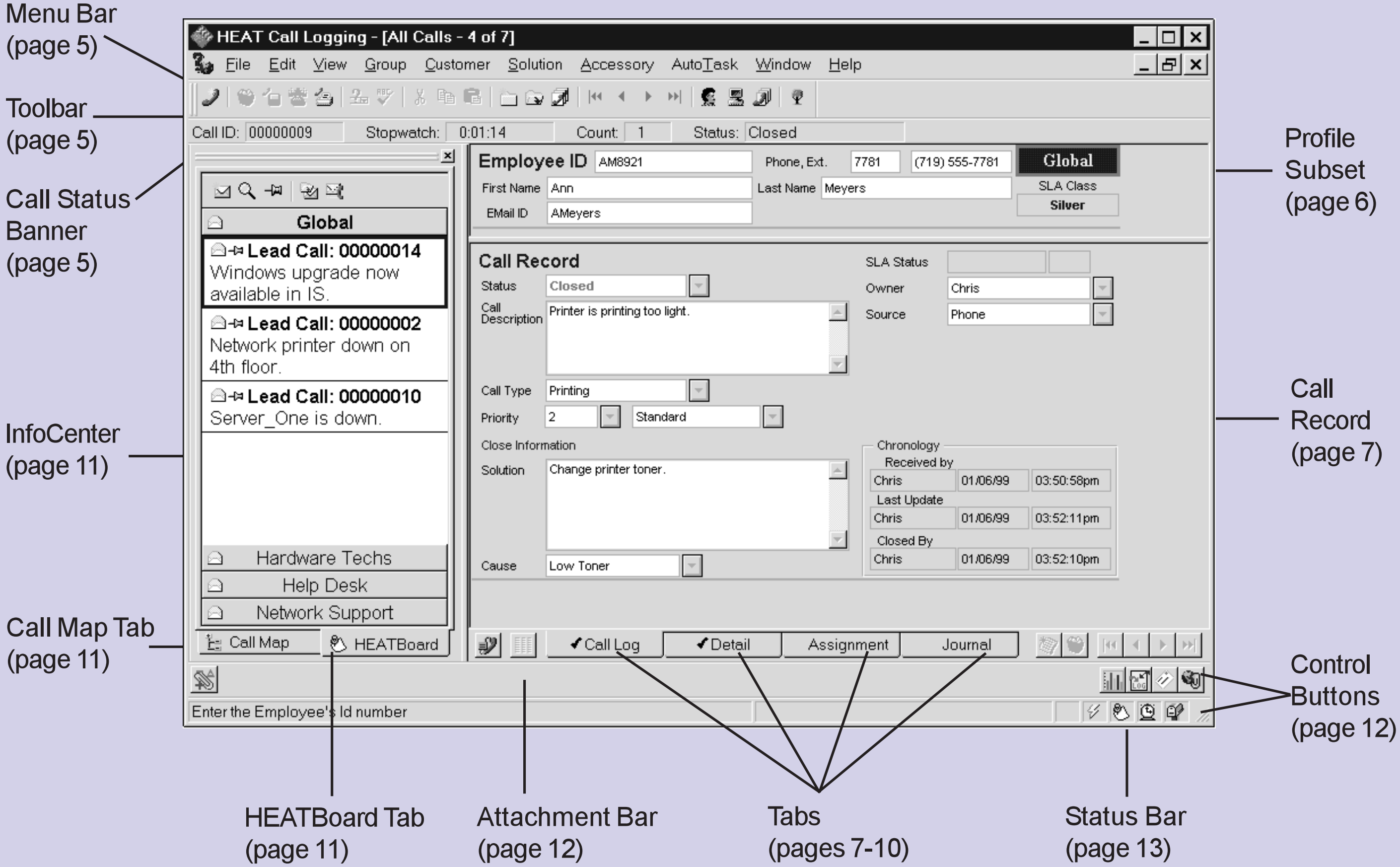
1. Double-click the **Call Logging** icon on your desktop, or select **Programs>>HEAT>> Call Logging** from the **Start** menu.
2. If the **Select Data Source** dialog box appears, select a data source.
3. Click **OK**.
4. Type your **User ID** and **Password**. Note: The password is case-sensitive.
5. Click **OK**.





The Call Logging Screen

The main Call Logging screen has several parts, each with its own information areas and purpose. Your System Administrator designs these screens, so your screen may differ from this example. The next eight pages show the different parts of the Call Logging screen and explain their uses.



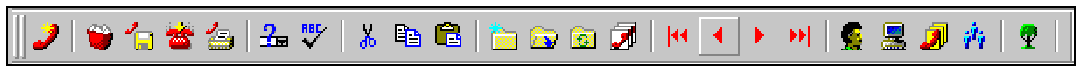
Menu, Toolbar, and Banner

The menu bar and the toolbar are the main controls for using HEAT. The Call Status Banner displays information about the current call in the current Call Group.

Menu Bar

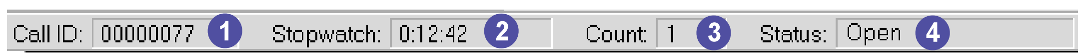
The Menu bar lists the commands you use to work with HEAT. To open a menu, click its name. To choose one of its commands, click the command.

Toolbar



The toolbar buttons are shortcuts for issuing common commands. To use a toolbar button, click the button. This chapter explains how to customize the toolbar.

Call Status Banner



1. The Call ID is a unique reference number for a Call Record, generated automatically by HEAT.

2. The Stopwatch shows the elapsed time since you have modified this Call Record.

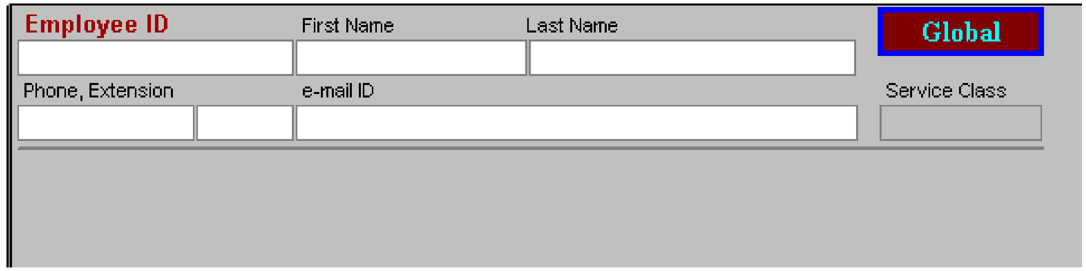
3. The Call Counter tracks multiple calls of identical items. Instead of creating multiple Call Records for several calls regarding the same problem, you can increment the number in the Count area.

4. The status area shows whether the call is open, closed, reopened, etc.

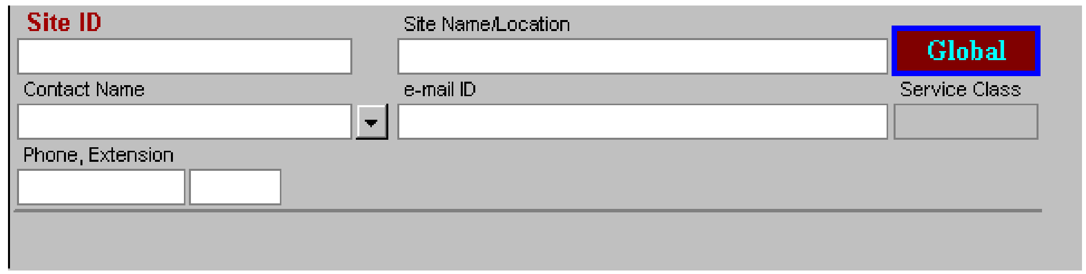
The Profile Subset

The Profile Subset appears at the top of each Call Record. The Profile is the background information on a customer. The Profile Subset is selected information from the Profile table, and is part of the Call Record. In Call Logging, ID numbers are associated with each company, employee and asset to identiry the caller each time a call is received. .

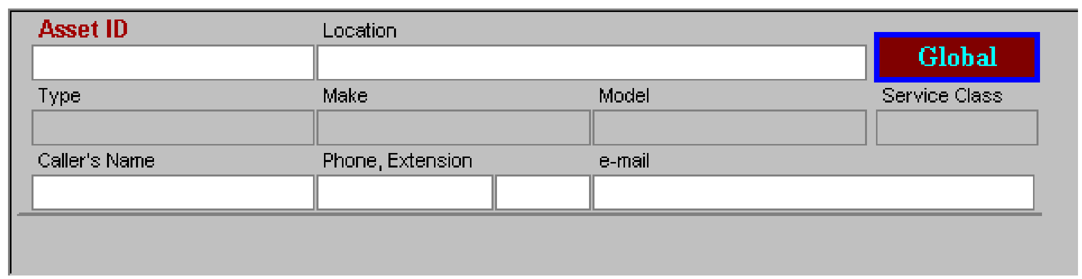
The SLA (Service Level Agreement) Class indicates the level of support your company has committed to this person or company. Your System Administrator defines Service Levels within your company.



Employee ID



Site ID



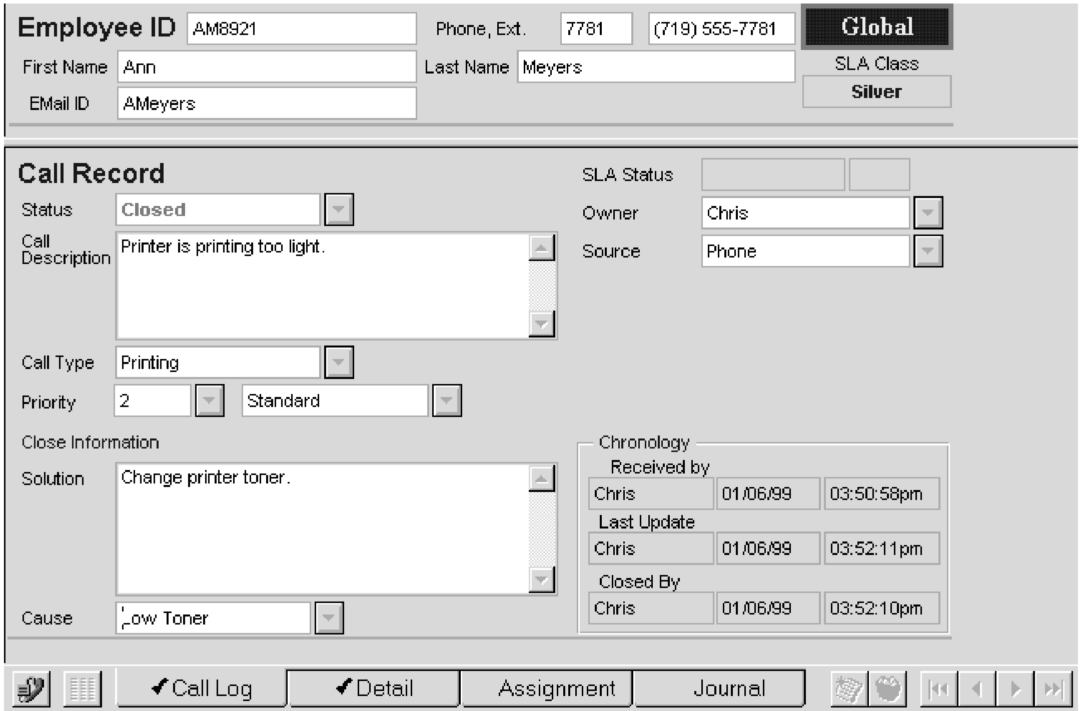
Asset ID

The Call Log Tab

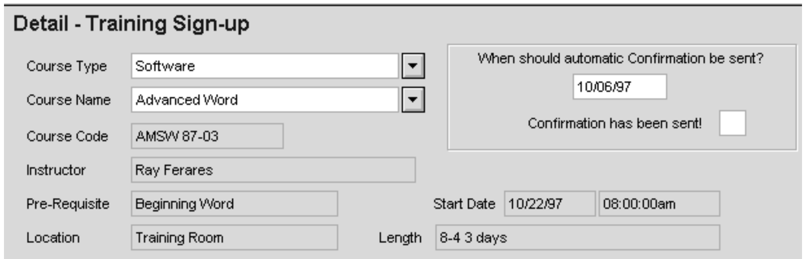
The Call Record appears below the Profile Subset. In it, you type information about the call.

This screen holds information about the specific call such as Call Type, call description, closure information, etc. It can be validated and auto-filled from a variety of different tables.

If your system administrator designs the Call Log area, your screen will look different from this example.



The Detail Tab



The Detail screen displays information specific to the Call Type selected on the Call Log tab.

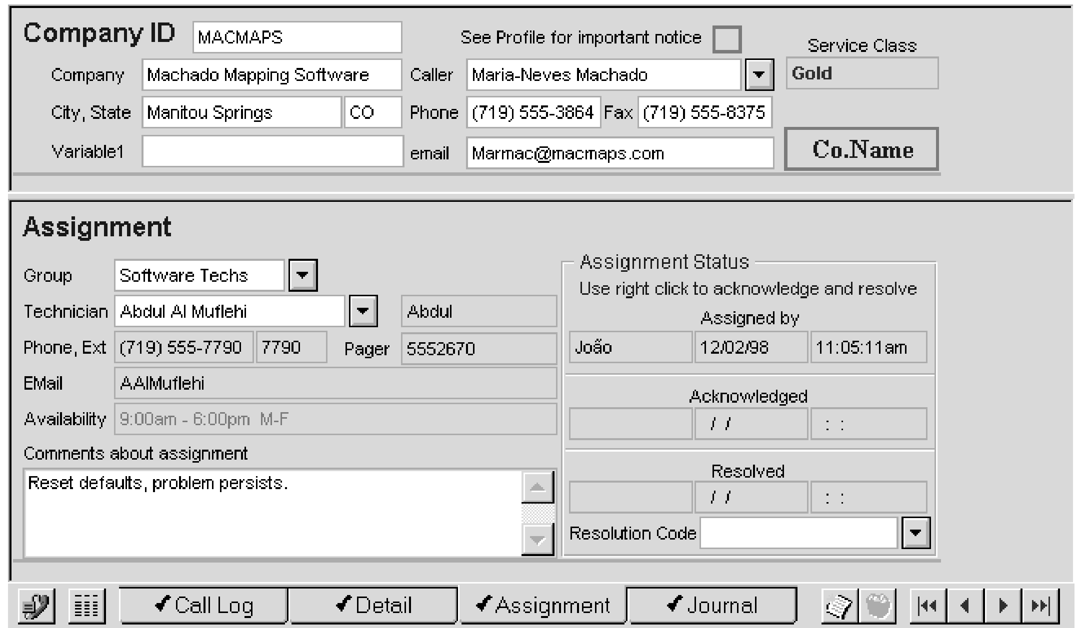
The Assignment Tab ✔Assignment

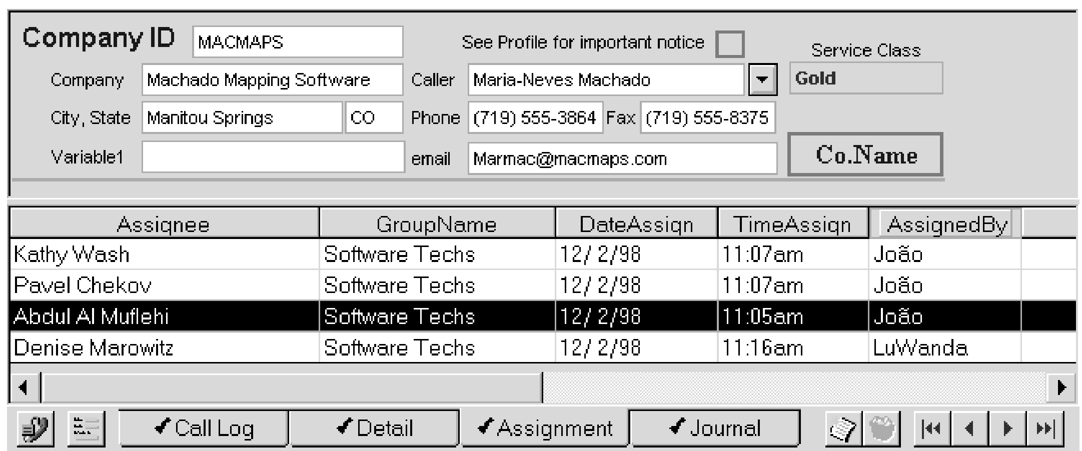
From the Assignment tab, you can assign the Call Record to a technician or a group of technicians. When you fill out the Assignment form and save it, the Call Record is assigned to the designated technician or group (upper picture).

Click the **Grid/Form View** button to see a grid view of all assignments made for this Call Record (lower picture).

TIP

To print the grid, right click on the grid and select print.

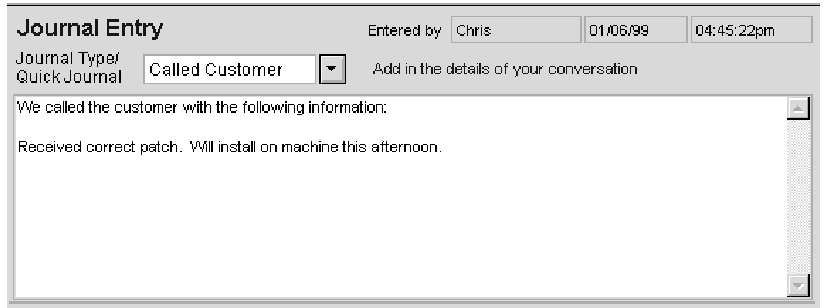


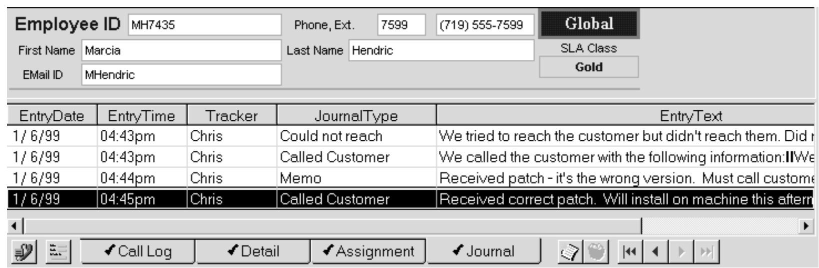


The Journal Tab

From the Journal tab, you can write notes or other journal entries pertaining to this Call Record (upper picture).

Click the **Grid/Form View** button to see a grid view of all journal entries made for this Call Record (lower picture).





The InfoCenter

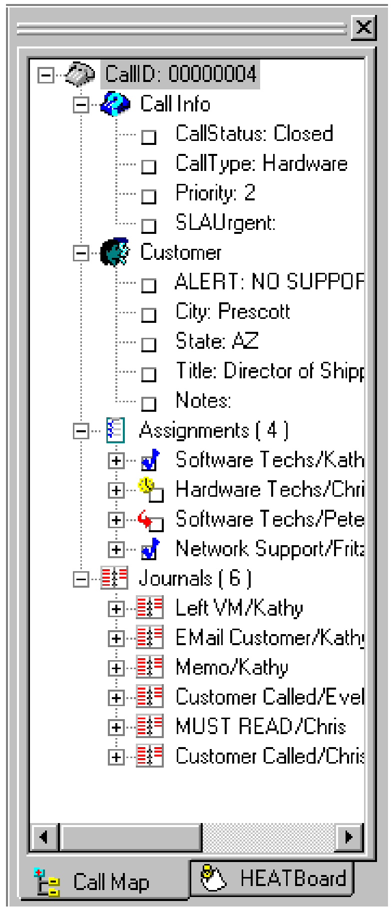
The InfoCenter appears in a pane next to the Call Record. It contains two tabs: The Call Map and the HEATBoard.

The Call Map is an expandable and collapsible summary view of the current Call Record. The system administrator determines which fields appear in the Call Map.

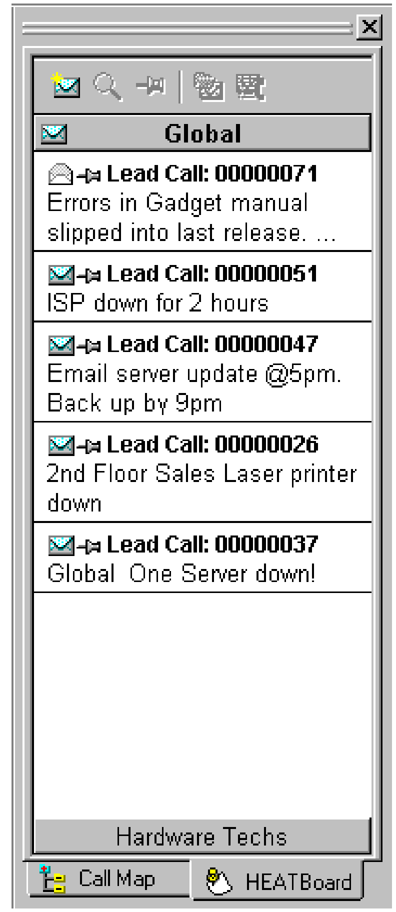
With the HEATBoard, members of a team can post and read issues from other team members and receive system-wide information.

SEE ALSO

"Opening the Call Map" and "Viewing Issues," in this chapter.



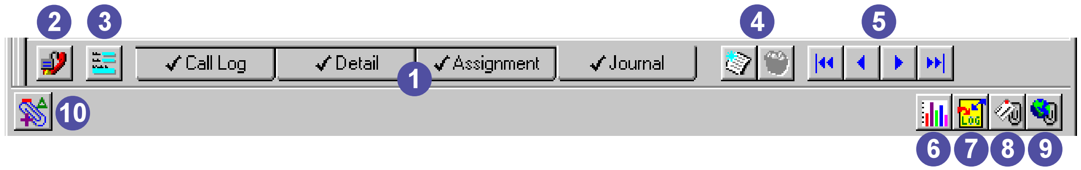
The Call Map



The HEATBoard

Tabs and Control Buttons

Near the bottom of the Call Logging screen are several control buttons. With these buttons, you can navigate among the call record information areas and display other information.



1 Click the **Call Log**, **Detail**, **Assignment**, or **Journal** tabs to display the information associated with each tab.

2 The **Lock** button locks a call so that only you can work on the Call Record. The System Administrator can also unlock the call. When the call is unlocked, the button has an unlocked padlock icon. When the call is locked, the button has a key icon. When the call is locked by someone else, the icon is a locked padlock.

3 The **Grid View-Form View** button lets you switch from an Assignment or Journal form to a grid view of all Assignments or Journal entries.

4 The **New** button on the Assignment and Journal tabs let you create a new Journal entry or Assignment. Click the **Abandon** button to abandon the current Journal or Assignment entry. The System Administrator controls rights to add or abandon journal and assignment entries.

5 The **Arrow** keys let you scroll through different forms on the Assignment and Journal tabs.

6 Click the **Display Activity Log** to open the Activity Log, which shows all Activity Log entries for the current call. An Activity Log shows any activity associated with a call, such as when the call was handles and by whom.

7 Click the **Display Call Transfer Log** to open the Call Transfer Log, which shows if the call has been transferred, and from where.

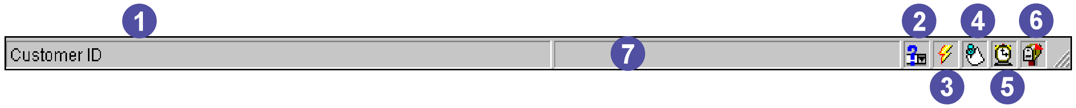
8 **Display E-Mail Attachments** displays mail attached to this call.

9 Click the **Display Global Attachments** to display any attachments stored in the HEAT database that are accessible for any user on any call.

10 Click the **Display Attachments Bar Menu** to add, edit, or remove attachments associated with the current Call Record.

Status Bar

At the bottom of the Call Logging screen is the Status Bar. It displays the current status of the Call Record.



1. The **Status Field** displays information about the current field.
2. The **Validated Field** icon indicates that the selected field requires data.
3. The **Required Field** icon indicates that the selected field must contain data.
4. The **HEATBoard** icon accesses the HEATBoard.
5. The **Alarms** icon indicates that alarms have fired when the alarm icon appears to be ringing.
6. The **SupportMail** icon indicates that SupportMail has been delivered to your mail box when the mail box flag is raised.
7. The **Searching Field** shows searching status and results.

Creating Call Records

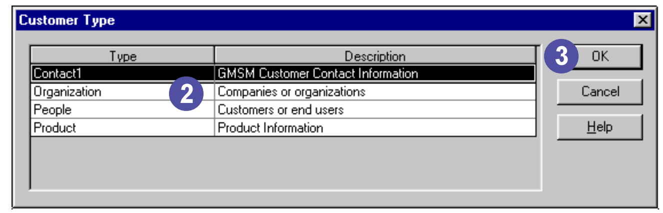
A Call Record is a complete record of a problem or service request from a customer or employee. Each Call Record is linked to a Customer Record.

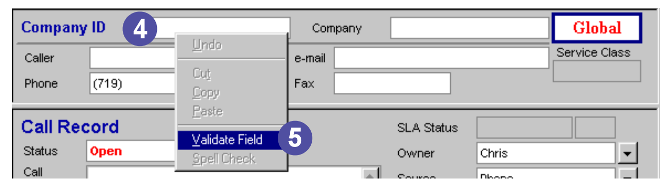
Some fields in a Call Record are validated fields. Validated information is linked to one or more databases. When you select validated information for a field, HEAT auto-fills all the other validated fields. Using validated information ensures accuracy when filling out a form.

Your system administrator may also set up fields that are "helpfully validated." Helpful Validation lets you type new information in a field if an appropriate entry cannot be found in the drop-down list.

Create a Call Record

1. Select **New Call Record** from the **File** menu.
2. Select a **Customer Type**. (This dialog box does not appear after you log the first call. It defaults to the Customer Type of the last Call Record created. To select a new customer type, select **Customer Type** from the **File** menu, then select a Customer Type.)
3. Click **OK**.
4. Right-click in a **validated field** (generally the ID Number field, such as Company ID).
5. Select **Validate Field**.
6. Double-click a **customer**. The Profile Subset fields are auto-filled with the customer's information.



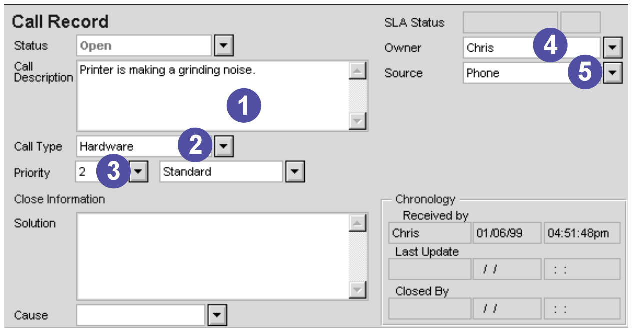


TIP

Give the Call ID Number to the customer to simplify subsequent calls.

Fill out the Call Record

1. Type a **description** of the call.
2. Select the **Call Type**.
3. Select the **call priority**, if necessary (it is generally auto-filled based on Call Type).
4. Select the **owner**, if necessary (it defaults to the **User ID**).
5. Select the **source** of the call (it defaults to **Phone**).
6. Select **Save Call Record** from the **File** menu.



Viewing Call Details

Details of a Call Record appear on the Detail Tab. Before you must select a Call Type for the current call.

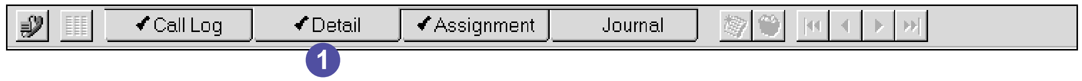
Each Call Type may have a different Detail Screen. The fields in the Detail Screen vary with the Call Type you select in the Call Log screen. Not every Call Type has a Detail screen.

The Detail window is customizable and will look a little different from our example.

Two Detail window examples are shown on the right — one is for a product issue, and the other is for a manual request.

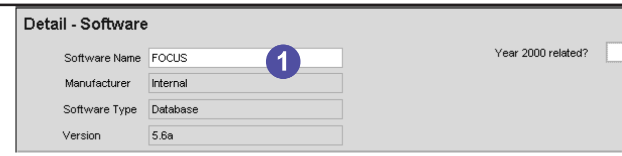
View Call Details

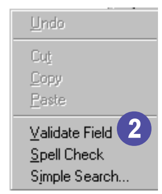
1. Click the **Detail** tab.



Example–Record Software Details

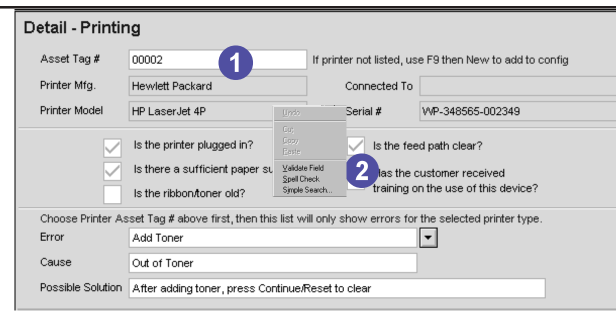
1. Right-click in the **Software Name** field.
2. Select **Validate**.
3. Choose the appropriate **product** from the list.
4. Click **OK.**





Example–Manual Request

1. Right-click in the **Asset** field.
2. Select **Validate Field**.
3. Select a **printer** from the list.



Assigning Call Records

Each Call Record may be assigned to a person or group that can solve it. A group has several technicians with a broad base of knowledge and experience. One of its members may specialize in solving the current problem.

You can assign a Call Record to more than one group or technician.

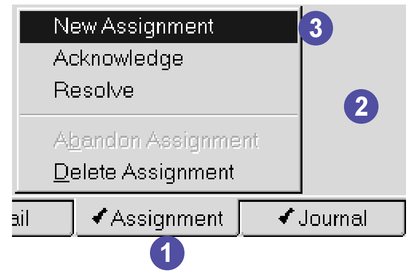
Each assignment appears in the Call Record.

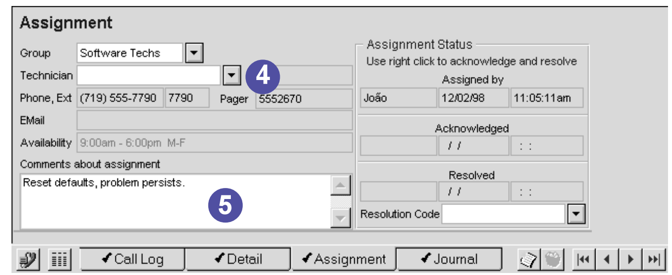
TIP

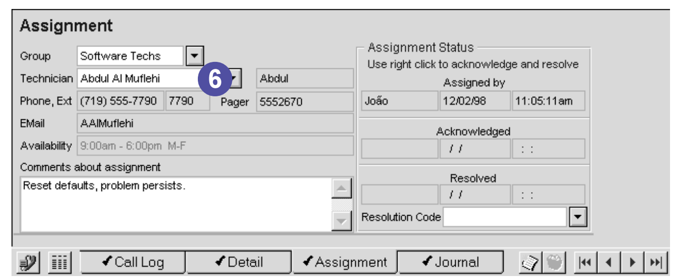
You can create a new assignment or abandon changes to the current assignment with the buttons to the right of the Journal tab.

Assign a Call Record

1. Click the **Assignment** tab.
2. Right-click the **Assignment** screen.
3. Select **New Assignment**.
4. Select a group from the **Group** drop-down box.
5. Type any comments or instructions in the **Comments about assignment** field.
6. You may select an Assignee from the **Assignee** drop-down box. Data about the Assignee automatically appears.
7. To assign this Call Record to another group or technician, repeat steps 2-6.







Abandoning Assignments

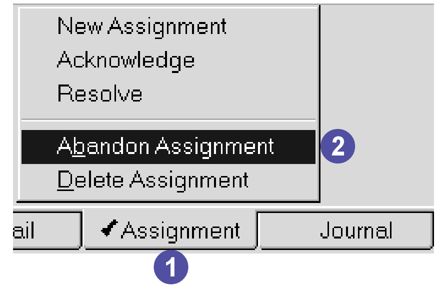
Before you save an assignment in a Call Record, you can abandon the assignment.

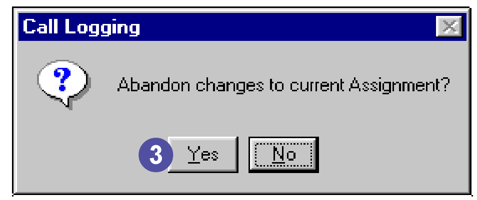
TIP

You can create a new assignment or abandon changes to the current assignment with the buttons to the right of the Journal tab.

Abandon an Assignment

1. Before you save a new Assignment, right-click the **Assignment** screen.
2. Click **Abandon Assignment.**
3. Click **Yes**.





Viewing Assignments

A Call Record can have multiple assignments.

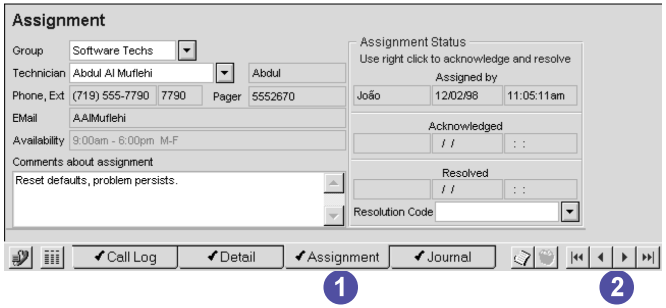
In grid view, you can view a list of all assignments. Each row in the grid represents one assignment for the selected Call Record. If you select an assignment from the grid, it appears in form view.

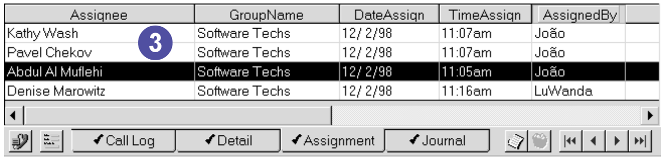
TIP

You can set the default view for assignments under Grid Settings in the User Preferences dialog box.

View Assignments

1. Click the **Assignment** tab. Assignments for the Call Record appear. (Assignments are available if the tab has a check mark.)
2. In the **Form** view, click the right, left, first, or last arrow buttons to page through Assignments for this Call Record.
3. In the **Grid** view, all assignments for the Call Record appear. Double-click the Assignment you want to view. The selected assignment appears in form view.





Acknowledging Assignments

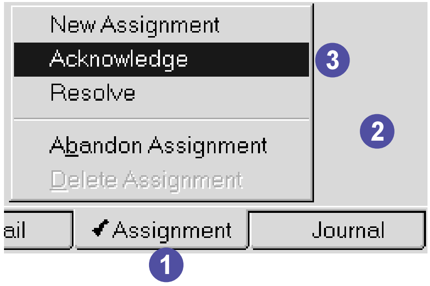
When you receive an assignment, your first step is to acknowledge it. The acknowledgment becomes part of the Call Record.

TIP

Create and save a Call Group of all Call Records assigned to you or your department. Each time you open or refresh that Call Group, you will see all new Call Records assigned to you.

Acknowledge an Assignment

1. Click the **Assignment** tab on a Call Record assigned to you.
2. Right-click the **Assignment** screen.
3. Click **Acknowledge**.

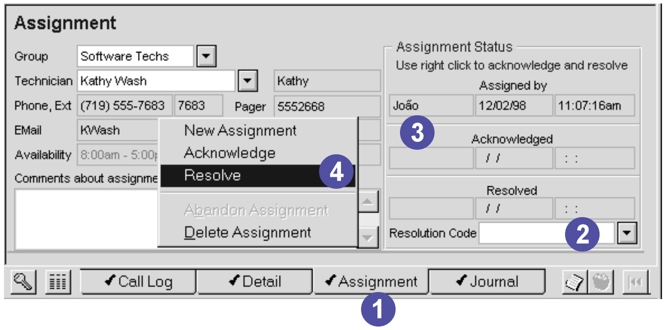


Resolving Assignments

When you have resolved an assignment, you can record the resolution in the Call Record. Resolving an assignment does not close a Call Record.

Resolve an Assignment

1. Click the **Assignment** tab on a Call Record assigned to you.
2. Select a **Resolution Code** from the **Resolution Code** drop-down box.
3. Right-click the **Assignment** screen.
4. Click **Resolve**.



Documenting Call Record Actions

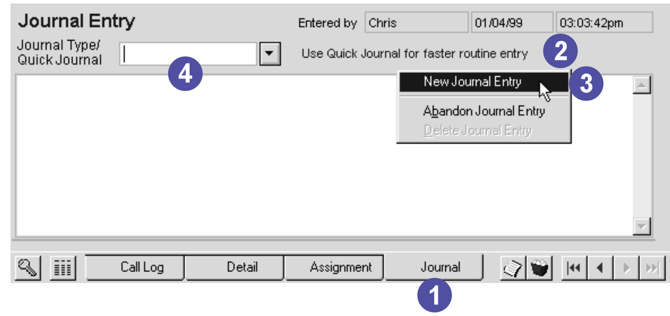
With the Journal, you can record details about a customer's call, technician actions on the call, and other information. A single Call Record can have multiple journal entries.

From the Journal Entry screen, you can open and view other HEAT screens, and then return to the Journal Entry screen.

You can paste information from other sources into the Journal. You can also paste journal entries into other fields.

Create a Journal Entry

1. Click the **Journal** tab.
2. Right-click the **Journal** screen.
3. Select **New Journal Entry**.
4. Type journal information in the **Journal Entry** Fields.



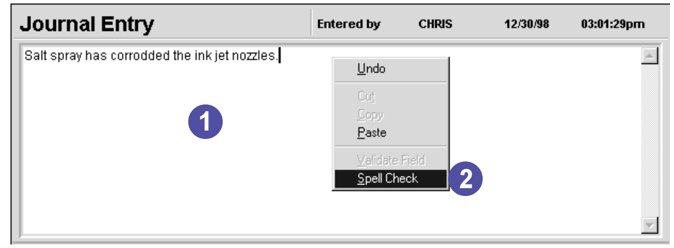
Checking Spelling in Journal Entries

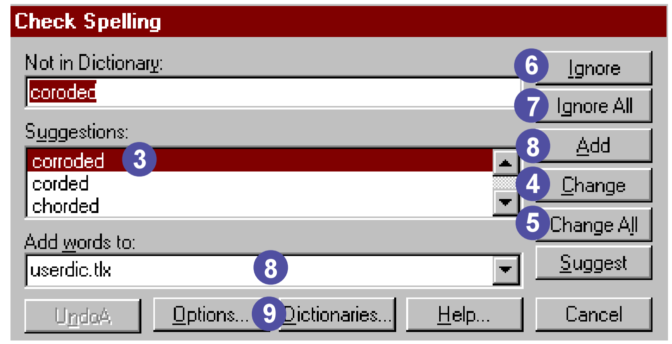
The Spell Check operates like the spell check found in many word processors. It displays words that are not in its dictionary. Often it suggests replacement words.

You can select a replacement word, ignore the word, or type a new word.

Check Spelling

1. Right-click the **Journal Entry** screen.
2. Click **Spell Check**.
3. To select a suggested word, highlight the **correct spelling** in the Suggestions list.
4. To replace the word with the highlighted suggested word, click **Change**.
5. To replace all instances of the word with the highlighted word, click **Change All**.
6. To ignore the word, click **Ignore**.
7. To ignore all instances of the word, click **Ignore All**.
8. To add the word to a custom dictionary, select a dictionary from the drop-down box and click **Add.**
9. To select the options you would like to use, click the **Options** button.





Abandoning Journal Entries

You can abandon a Journal entry before you save it.

TIP

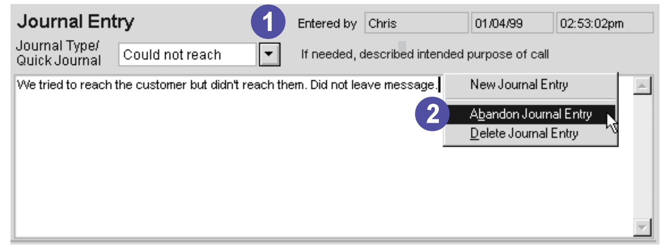
You can create a new journal or abandon changes to the current journal with the buttons to the right of the Journal tab.

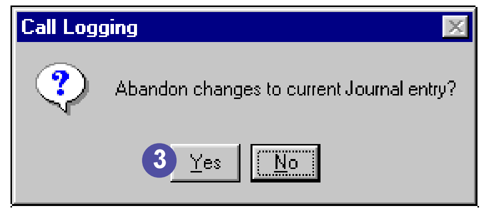
Abandon a Journal Entry

1. Before you save a new Journal entry, right-click the **Journal Entry** screen.

2. Click **Abandon Journal Entry**.

3. Click **Yes**.

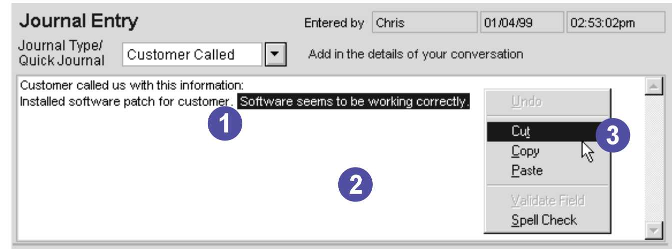




Editing Journal Entries

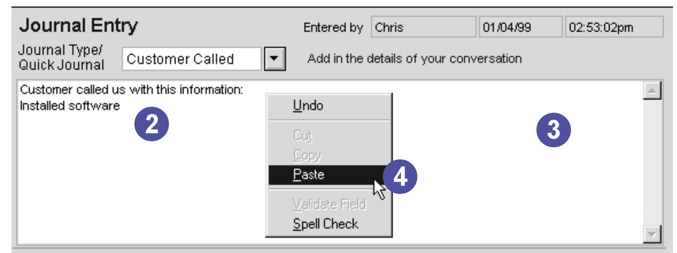
You can cut, copy, and paste text in a Journal entry.

Copy or Cut Text from the Journal



1. Highlight the **text** you want to copy or cut.
2. Right click.
3. Select **Copy** or **Cut**.

Paste Text into the Journal



1. Copy the **information** you want to paste into the Journal.
2. Click in the **Journal Entry** screen at the point where you want to paste the text.
3. Right click.
4. Select **Paste**.

Viewing Journal Entries

A Call Record can have multiple Journal entries. You can view Journal entries in form view or in grid view.

In form view, each Journal entry appears on a form. Use the navigation buttons to scroll through Journal entries.

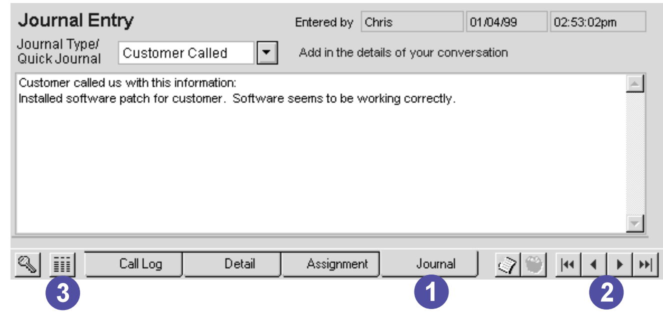
In grid view, a grid displays a list of all Journal entries. Each row in the Grid represents one Journal entry for the selected Call Record.

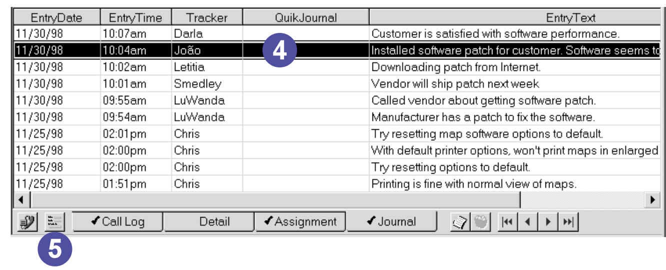
TIP

You can set the default view for journal entries under Grid Settings in the User Preferences Dialog Box. See "User Preferences," Chapter 10.

View a Journal Entry

1. Click the **Journal** tab. The current Journal entry appears in the view selected in User Preferences.
2. Click the **first, previous, next, or last buttons** to page through Journal entries for this Call Record.
3. Click the **Grid** icon. All Journal entries for the Call Record appear in grid view.
4. Click the **Journal entry** you want to view.
5. Click the **Form** icon. The selected Journal entry appears in form view.





Printing Grids

You can print the grids displayed while you are in Grid View.

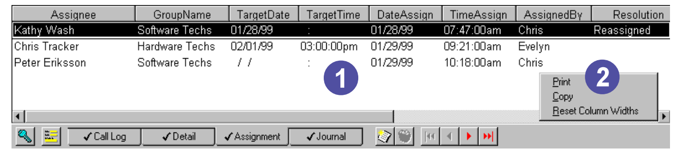
In addition, HEAT provides a Grid Page Setup feature to set the Headers, Footers and Fonts that apply to the printed document.

The following areas have Grid Printing featues:

- Call Records in Assignment and Journal views.
- Records in Table Maintenance
- Call Record Browse

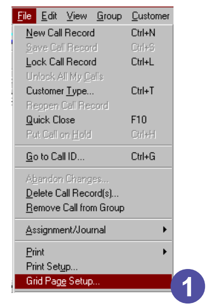
Print a Grid

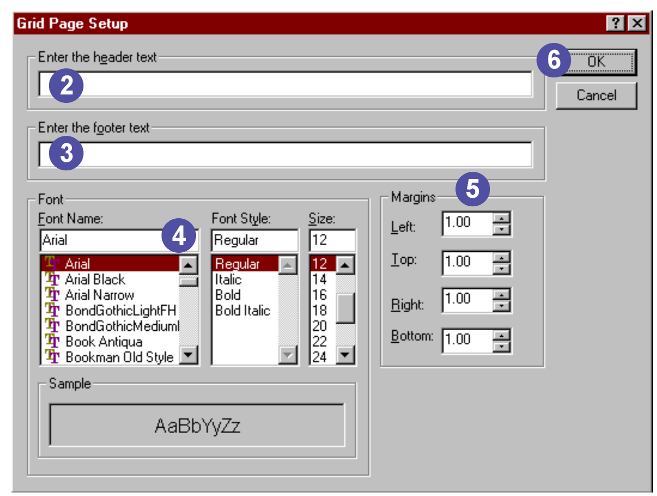
1. **Right-click** on the grid.
2. Select **Print**.



Grid Page Setup

1. Select **File>>Grid Page Setup**.
2. Enter the **Header** text.
3. Enter the **Footer** text.
4. Select the **font, font style** and **size**.
5. Set the **margins**.
6. Select **OK.**





Locking and Unlocking Call Records

When you lock a Call Record, it is temporarily unavailable to anyone else. Your system administrator controls rights to edit calls locked by other users. A Call Record becomes locked when modified and unlocked when saved.

TIP

The symbol on the Lock-Unlock button shows whether a call is locked or unlocked.

The key shows your call is locked. Clicking the button unlocks your call.

The open lock shows your call is unlocked. Clicking the button locks the call.

The closed lock shows that the call has been locked by someone else. Hold the cursor over the button to see who locked it, and when.

Lock a Call Record

1. Select **Lock Call Record** from the **File** menu.

Unlock a Call Record

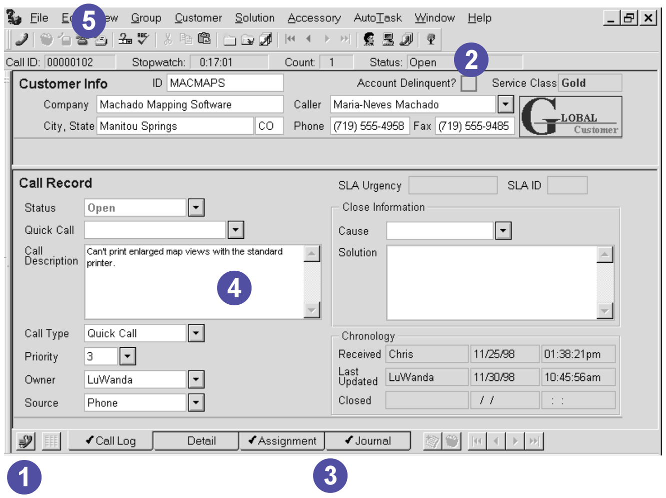
1. Select **Unlock Call Record** from the **File** menu.

Updating Call Records

You can update any unlocked, non-closed Call Record. If the Call Record is closed, you may reopen it before editing. (See your system administrator.) You can change most of the information in a Call Record, including the Customer ID and Customer Type.

Update a Call Record

1. Check the **Locked-Unlocked** icon to make sure this Call Record is unlocked.
2. Check the **Status** box to make sure the call is not closed. You may only update open, unlocked calls.
3. Click the tab screen you want to update.
4. Edit the fields you want to update.
5. Click the **Save** button.



Putting Call Records on Hold

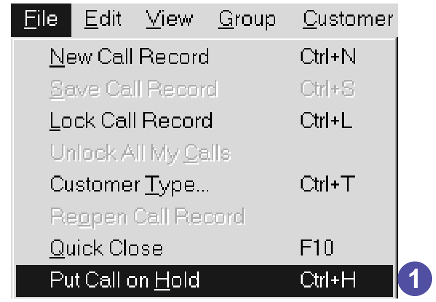
You can only work on one unsaved Call Record at a time. If you must open a new Call Record before you save the current Call Record, you can put the current Call Record on hold.

A Call Record on hold resides in a Call Group called Calls on Hold. It stays there until you complete the Call Record and save it.

If a system administrator commits an edit set, all calls on hold will be lost.

Put a Call Record on Hold

1. Select **Put Call on Hold** from the **File** menu.



Take a Call Record Off of Hold

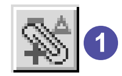
1. Select **Calls on Hold** from the **Group** menu.
2. Select the Call Record you want to take off hold.
3. Finish the required fields on the call.
4. Save the call. It will be removed from the Calls on Hold group.

Attaching Files to Call Records

You can attach one or more files or applications to a Call Record. You can also attach a file globally to the system.

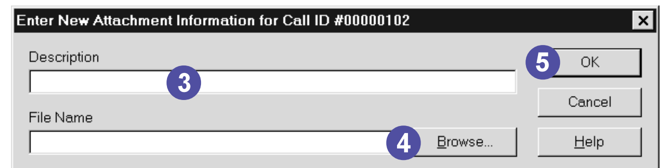
In order for others to view an attachment, it must be in a location that is shared by all, for example, a folder on a shared network directory.

Attach a File to a Call Record



1. Click the **Display Attachment Bar Menu** icon.

2. Click **Add Attachment**.



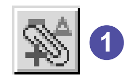
3. Type a description (this appears in the Attachment bar).
4. Click **Browse** to browse to the path and file name of the file, or type a file name or URL into the **File Name** field.
5. Click **OK**.

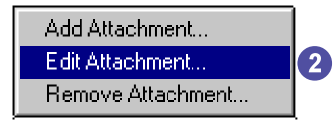
Editing Attachments

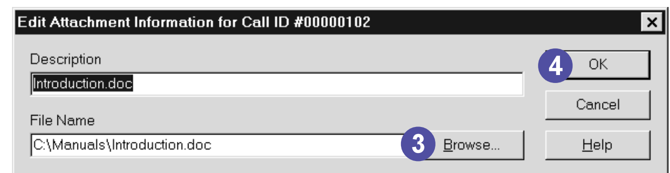
You can edit the file names and paths to attachments.

Edit an Attachment

1. Click the **Display Attachment Bar Menu** icon.
2. Click **Edit Attachment**. If there is more than one attachment, select the attachment to edit.
3. Click **Browse** to browse to the path and file name of the file, or type the pathname of the file in the **File Name** field.
4. Click **OK**.





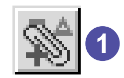


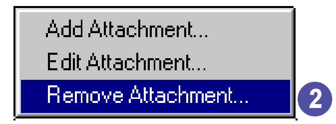
Removing Attachments

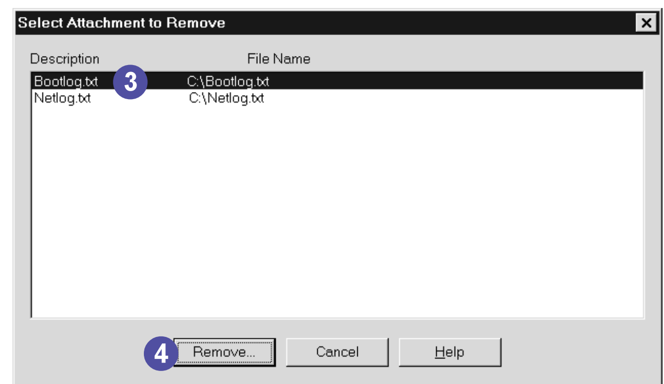
You can remove attachments from a Call Record.

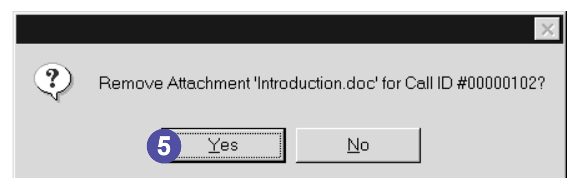
Remove an Attachment

1. Click the **Display Attachment Bar Menu** icon.
2. Click **Remove Attachment**.
3. Select the attachment to be deleted.
4. Click **Remove**.
5. Click **Yes**.









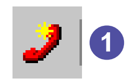
Saving Call Records

To enter a Call Record into the database, you must save it. You can save in several ways. First, you can access the File menu and select the save option. You can click the Save Call icon on the toolbar. If you have not yet saved an open Call Record and you attempt to close HEAT, or open a different Call Record, HEAT will prompt you to save the call.

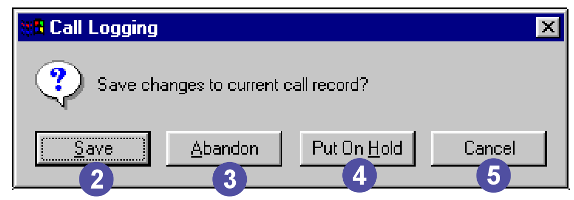
Save a Call Record

1. Click the **Save Call** icon on the toolbar.

Save a Call Record



1. With a Call Record open, click **New Call Record**.
2. Click **Save** to save this call and begin another operation.
3. Click **Abandon** to abandon this Call Record without saving it.
4. Click **Put On Hold** to put this call on hold.
5. Click **Cancel** to return to the current Call Record.



Closing Call Records

You can close a Call Record when the problem is resolved or otherwise becomes inactive. If you have not completed close-required fields for the Call Record, HEAT will show which fields must be completed before the call can be closed.

TIP

Don't close a Call Record if you think you may need to add more information to it.

Close a Call Record

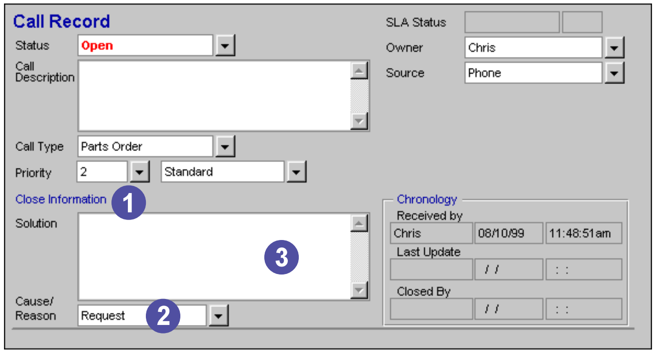
1. Complete the **Close Description** information in the Call Record.

2. You may enter a Cause in the **Cause** field or select a Cause from the validation table.

3. You may type notes about the resolution of this problem in the **Solution** field.

4. Click the **Quick Close** icon on the toolbar.

   Note: If you haven't completed the close required fields, a dialog displays the fields you must complete before you can close the call.




4

Using the Stopwatch

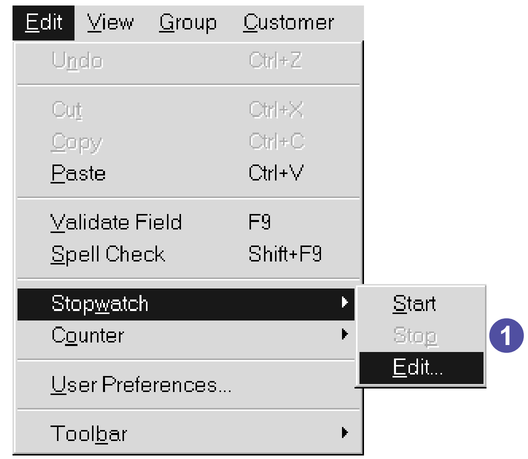
The Call Logging screen has a stopwatch in the Call Status Banner. It records the time spent on a Call Record.

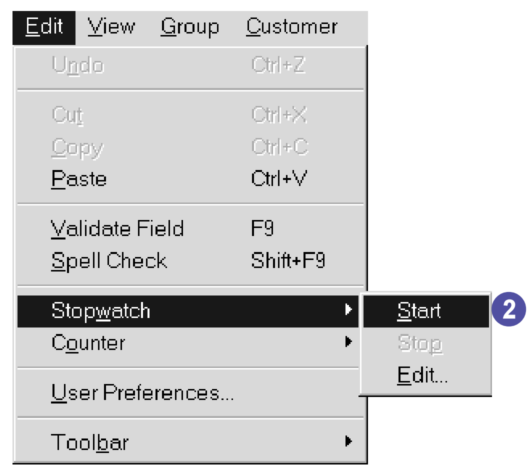
Your system may be set up to start the stopwatch when you open a new Call Record, or when you begin to enter information into a Call Record. The stopwatch stops when you save, close, or abandon a Call Record.

You can stop and restart the stopwatch manually. You can also change the time displayed on the stopwatch.

Use the Stopwatch

1. To stop the stopwatch, select **Stopwatch>>Stop** from the **Edit** menu.
2. To start the stopwatch, select **Stopwatch>>Start** from the **Edit** menu.



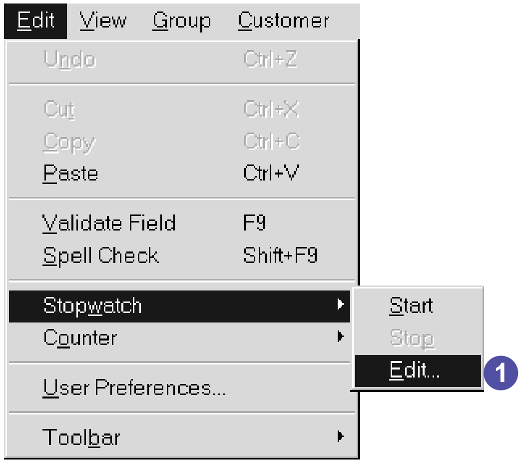


TIP

Your system administrator controls rights to change the stopwatch.

Change the Stopwatch Time

1. Select **Stopwatch>>Edit** from the **Edit** menu.
2. Type the new stopwatch time in the field. Use the format **HHHH:MM:SS**.
3. Click **OK**.



Resizing Grid Column Widths

HEAT retains resized grid column widths in the following areas of Call Logging:

- Profile, Configuration, and Call History grids in the Customer window
- Table Maintenance
- Validation
- Assignment and Journal Lists
- Call Record Browse

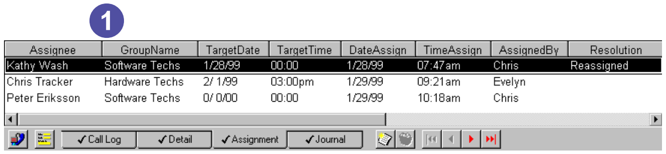
TIP

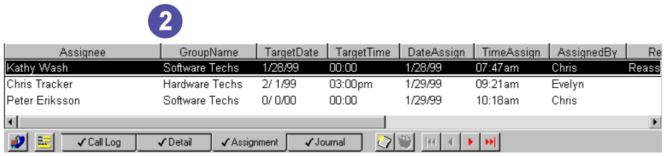
Use the Reset Column Widths option to restore system defaults by right-clicking on the grid and selecting Reset Column Widths.

Resizing Column Widths

1. Left click on the splitter bar between columns.

2. Drag the splitter bar to the new location.





Using the Call Counter

The Call Record screen has a Call Counter in the Call Status Banner. It records the number of calls about the same problem.

TIP

You can change the keys to Increment or Decrement Call Counting in User Preferences, Detail Tab, Chapter 10.

TIP

While the Call Counter records the number of calls associated with an issue, the HEATBoard can provide specific information regarding the issue, link associated calls, and be team-based.

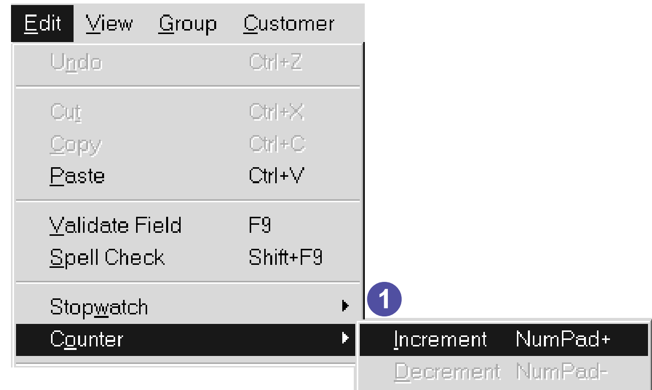
SEE ALSO

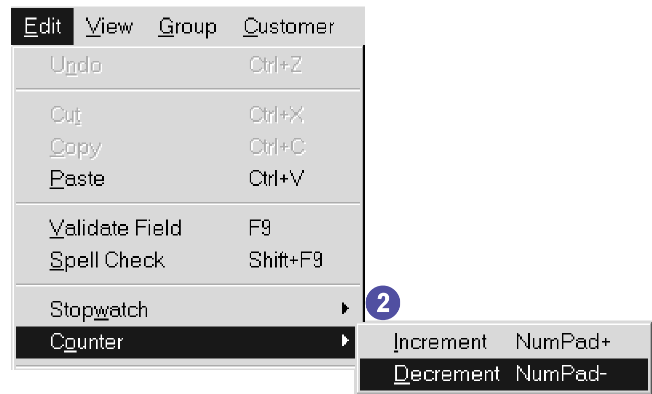
Viewing Issues, in this chapter.

Change the Call Counter

1. To increment the Call Counter, select **Counter>> Increment** from the **Edit** menu.

2. To decrement the Call Counter, select **Counter>> Decrement** from the **Edit** menu.





Customizing Toolbars

Your system administrator sets up a default toolbar for each role. When you launch Call Logging, your role's default toolbar appears at the top of the screen.

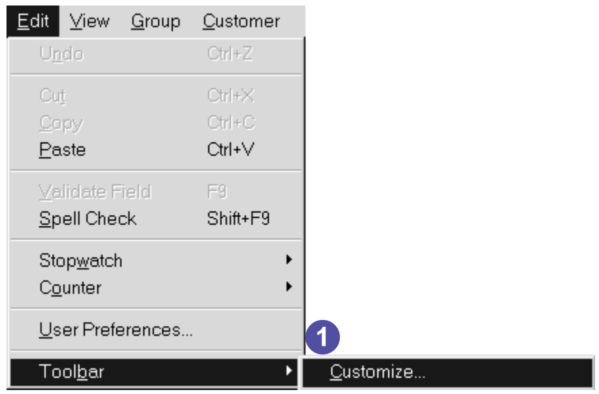
You can add tool buttons to a toolbar. The system administrator controls rights to customize toolbars.

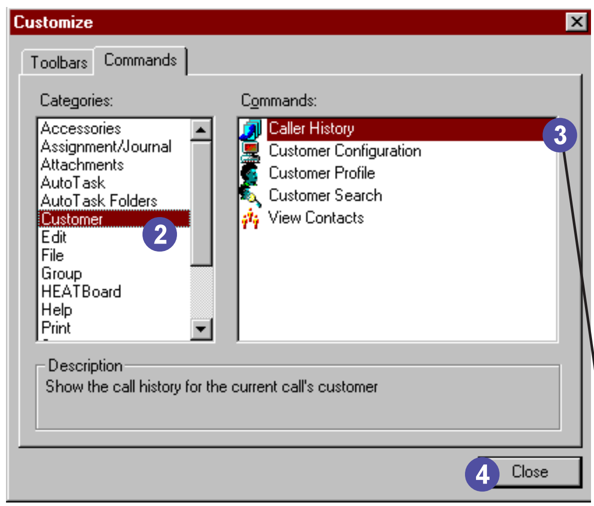
TIP

You can also customize toolbars from the Customer, Table Maintenance and Validation Update windows.

Add a Button to an Existing Toolbar

1. Select **Toolbar>> Customize** from the **Edit** menu.
2. Select a **button category.**
3. Drag a **tool button** from the Commands field to the toolbar.
4. Click **Close**.





New Toolbar

TIP

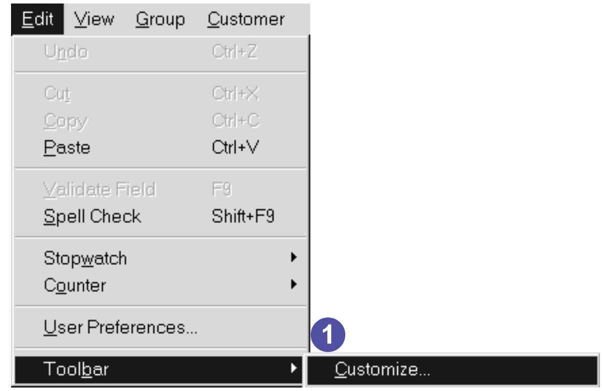
You can remove buttons from a toolbar. The system administrator controls rights to customize toolbars.

Remove a Button from a Toolbar

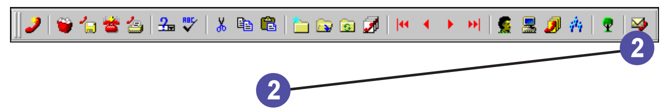
1. Select **Toolbar>> Customize** from the **Edit** menu.

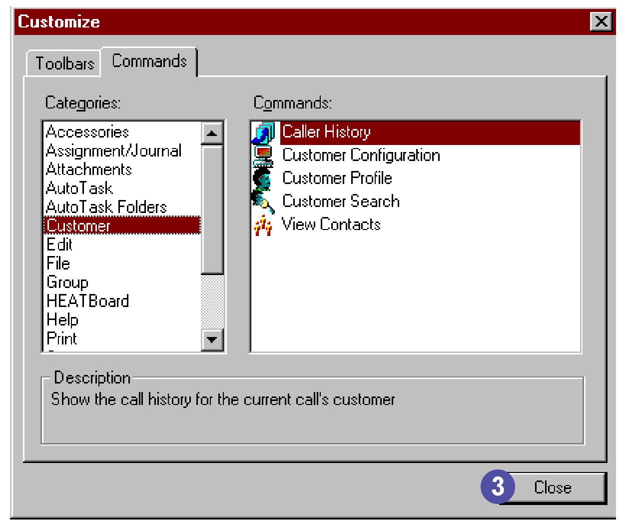
2. Drag the **unwanted button** off the toolbar and release it.

3. Click **Close**.



New Toolbar





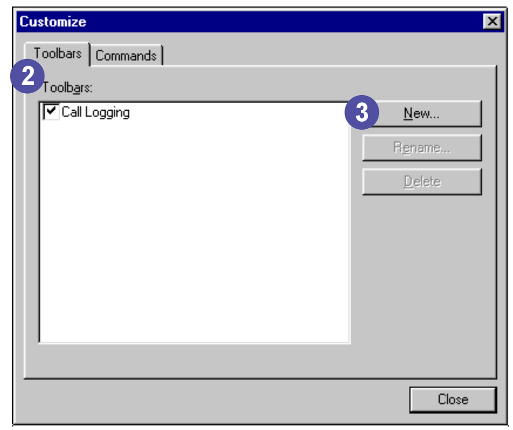
Creating Toolbars

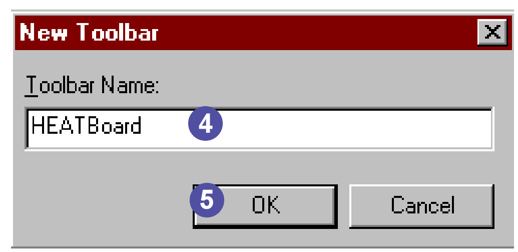
You can add other toolbars to the Call Logging screen.

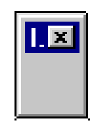
When a new toolbar is created, it is empty until buttons are added to it.

Create a Toolbar

1. Select **Toolbar>> Customize** from the **Edit** menu.
2. Click **Toolbars**.
3. Click **New**.
4. Type a **name** for the toolbar.
5. Click **OK**. The new toolbar appears.
6. To add buttons to the new toolbar, see the next page.







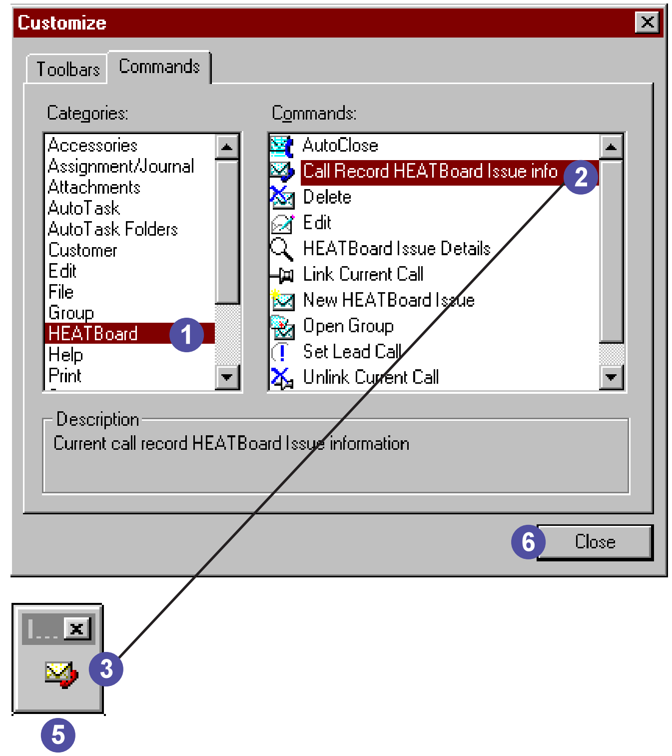
New Toolbar

TIP

You can add buttons from different categories.

Add a Button to the New Toolbar

1. Select a **button category**.
2. Select a **button** from the **Commands** field.
3. Drag the **button** onto the toolbar.
4. Repeat steps 1 through 3 for each button.
5. To delete a **button** from a toolbar, click and drag the button off the toolbar.
6. Click **Close**.

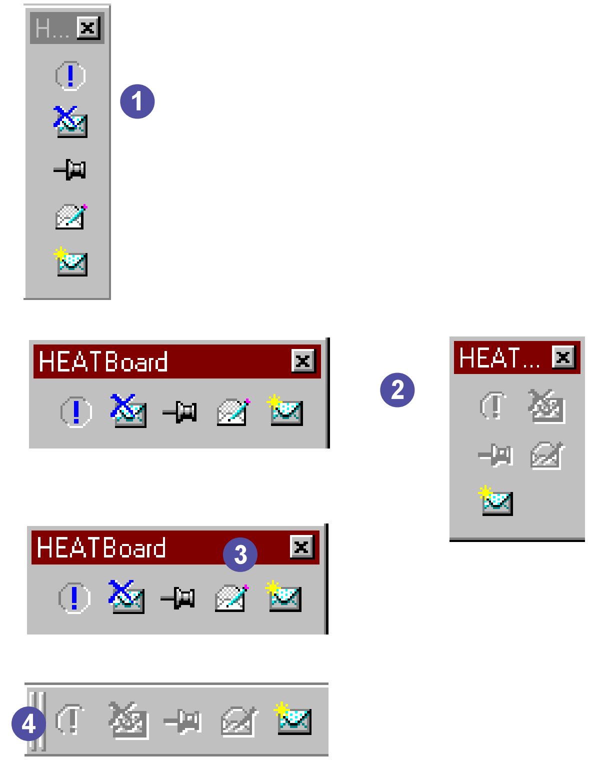


Resizing and Moving Toolbars

You can resize and move toolbars. A toolbar can be a vertical or horizontal band, or a square. It can float, or it can dock on any side of the screen (top, bottom, left, right).

Resize and Move a Toolbar

1. Move the cursor over the edge of the toolbar until the double arrow appears.
2. Drag the edge of the toolbar until it is the desired size.
3. To move the floating toolbar, click in the blue title bar and drag the toolbar to the new location.
4. If the toolbar is docked, click on the grab-handles (the double gray bars) located on the end of the toolbar; then drag to a new position.

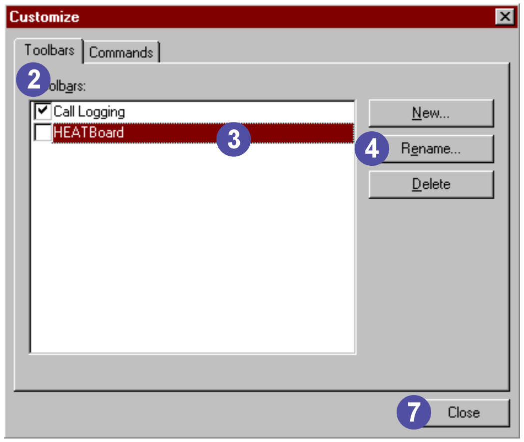


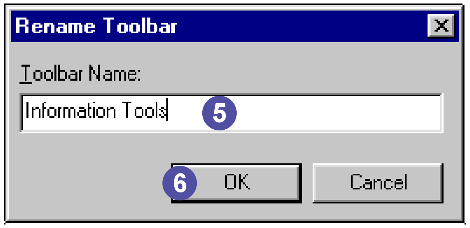
Renaming Toolbars

You can rename any toolbar that you create. You cannot rename the default toolbar.

Rename a Toolbar

1. Select **Toolbar>> Customize** from the **Edit** menu.
2. Click **Toolbars**.
3. Click the **toolbar** to rename.
4. Click **Rename**.
5. Enter a new **toolbar name**.
6. Click **OK**.
7. Click **Close**.



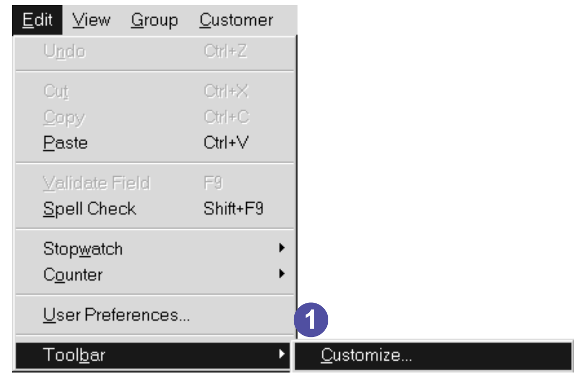


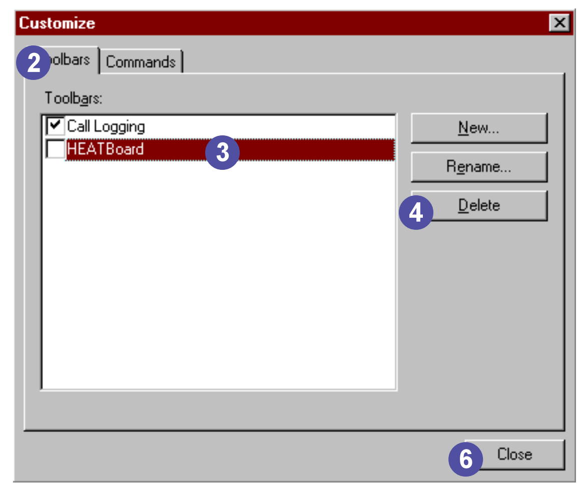
Deleting Toolbars

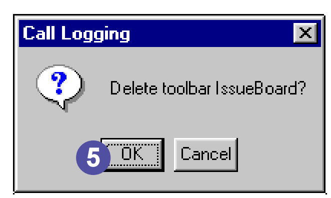
You can delete any toolbar you have created. You cannot delete the default toolbar.

Delete a Toolbar

1. Select **Toolbar>> Customize** from the **Edit** menu.
2. Click **Toolbars**.
3. Select the **toolbar** to delete.
4. Click **Delete**.
5. Click **OK**.
6. Click **Close**.







Resetting and Restoring Toolbars

If you modify your role's default toolbar, you can reset it to its default setting.

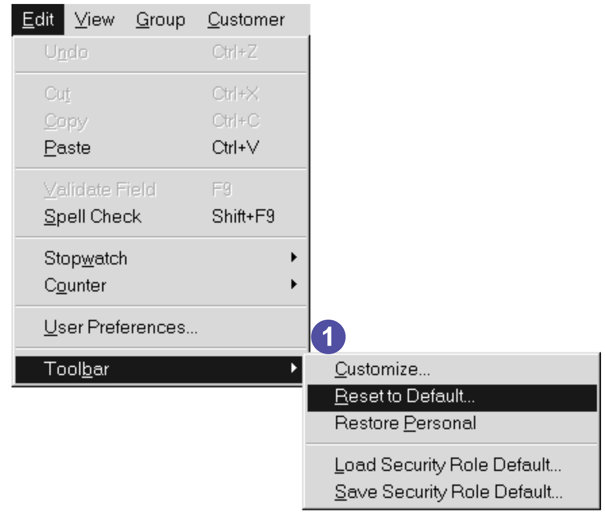
If you modify a personal toolbar, you can restore it to its setting from the last time the toolbar was saved.

TIP

The toolbar setup is saved when you exit from Call Logging.

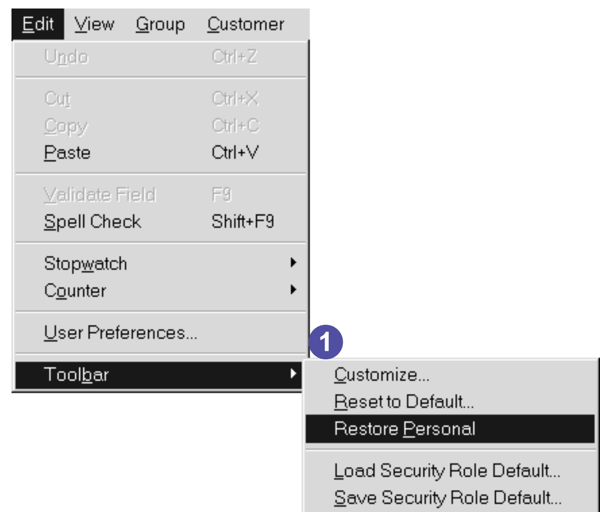
Reset the Toolbar

1. Select **Toolbar>> Reset to Default** from the **Edit** menu.



Restore the Toolbar

1. Select **Toolbar>> Restore Personal** from the **Edit** menu.

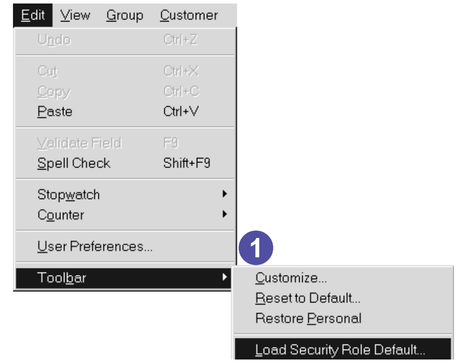


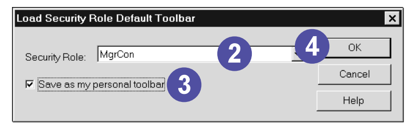
Loading and Saving Your Role's Toolbar

Your system administrator assigns a default toolbar to each role. If you have the appropriate rights, you can load and save this default toolbar.

Load the Toolbar

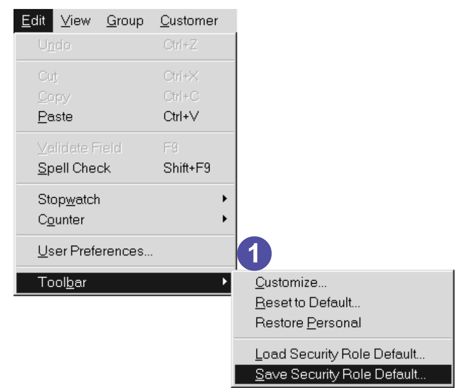
1. Select **Toolbar>> Load Security Role Default** from the **Edit** menu.
2. Choose a **security role** from the drop-down list.
3. Click **Save as my personal toolbar**.
4. Click **OK**.

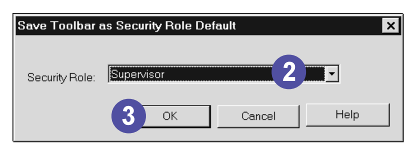




Save the Toolbar

1. Select **Toolbar>> Save Security Role Default** from the **Edit** menu.
2. Choose a **security role** from the drop-down list.
3. Click **OK**.





Opening the Call Map

The Call Map gives you a quick overview of the currently displayed Call Record. It displays information about calls, customers, journals, assignments, etc. Looking at the Call Map you can quickly view overdue assignments, call status, current assignee, etc. What you can view is based on your security rights. The Administrator Module defines the fields displayed on your Call Map.

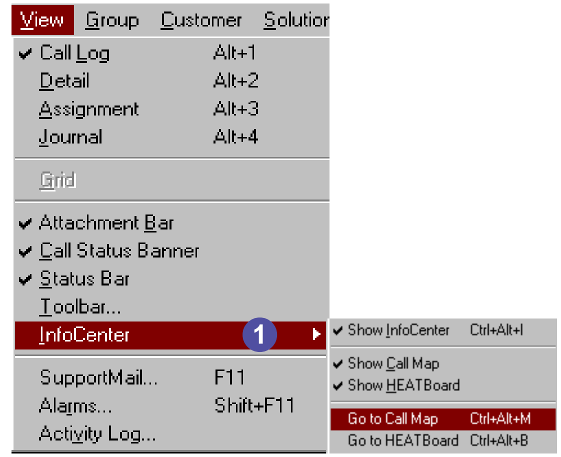
Specialized icons highlight key information that requires attention such as past due dates.

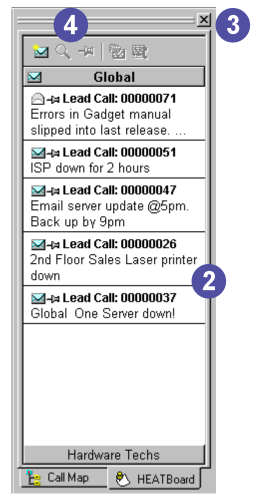
The number of journals and assignments can be included in the display of those nodes.

When opened, the Call Map becomes an additional pane on your Call Logging Window. It can be displayed as hidden or moved, depending on your personal preference.

Open the Call Map

1. Select **InfoCenter>>Go to Call Map** from the **View** menu.
2. To resize the Call Map, click and drag the edge of the pane.
3. To close the Call Map, click the **X** at the top right corner of the pane.
4. To move the Call Map, click on the grab-handle (double-bar) at the top of the Call Map, then drag it to its new location.





Using the Call Map

The Call Map displays a high-level view of the currently displayed Call Record. Call data is displayed in an information tree.

Your system administrator determines which fields appear in the Call Map. For example, the Call Map can notify you if assignments are acknowledged, resolved or overdue.

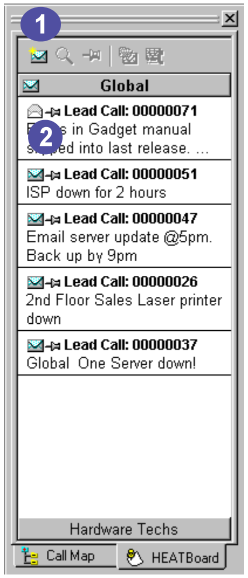
Expand or Collapse the Information Tree

1. To expand or collapse an information tree, click the plus or minus. The example shows branches of the information tree completely expanded.

   If an icon has a **+** beside it, it contains information. You can expand the information and view the Call Record's contents in detail by clicking on the **+**.

2. When an information branch has been expanded, its icon has a **-** beside it. Click the **-** to collapse the branch.

   Double-click an icon to take you to that area of the Call Record.



Opening HEATBoard

The HEATBoard is used to post important issues that might generate a number of calls. For example, when defective part has been shipped, several customers will call the Support Center. When a problem is reported, an issue can be posted to alert the support center. All calls related to the issue can then be "linked" to the issue.

The HEATBoard is team-based — issues can be specified for global viewing or team viewing. Depending on how the HEATBoard is defined in User Preferences, each team can be represented on the HEATBoard by a bar. A bar labeled "Global" displays issues posted for global viewing. An envelope icon on a team bar indicates that issues have been posted for that team. Only team members can view issues for that team, but all users with HEATBoard access can view Global team issues, depending upon their security rights.

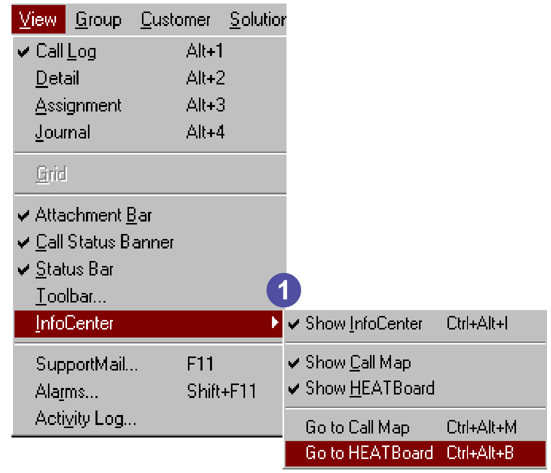
Open HEATBoard

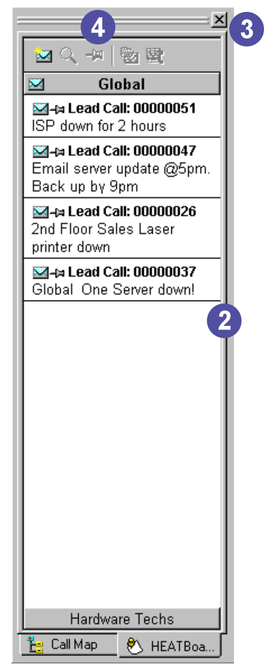
1. Select **InfoCenter>>Go To HEATBoard** from the **View** menu, or click the HEATBoard tab.

2. To resize the HEATBoard, click and drag the edge of the pane.

3. To close HEATBoard, click the **X** at the top right corner of the pane.

4. To move the HEATBoard, click on the grab-handle (double-bar) at the top of the HEATBoard, then drag it to its new location.

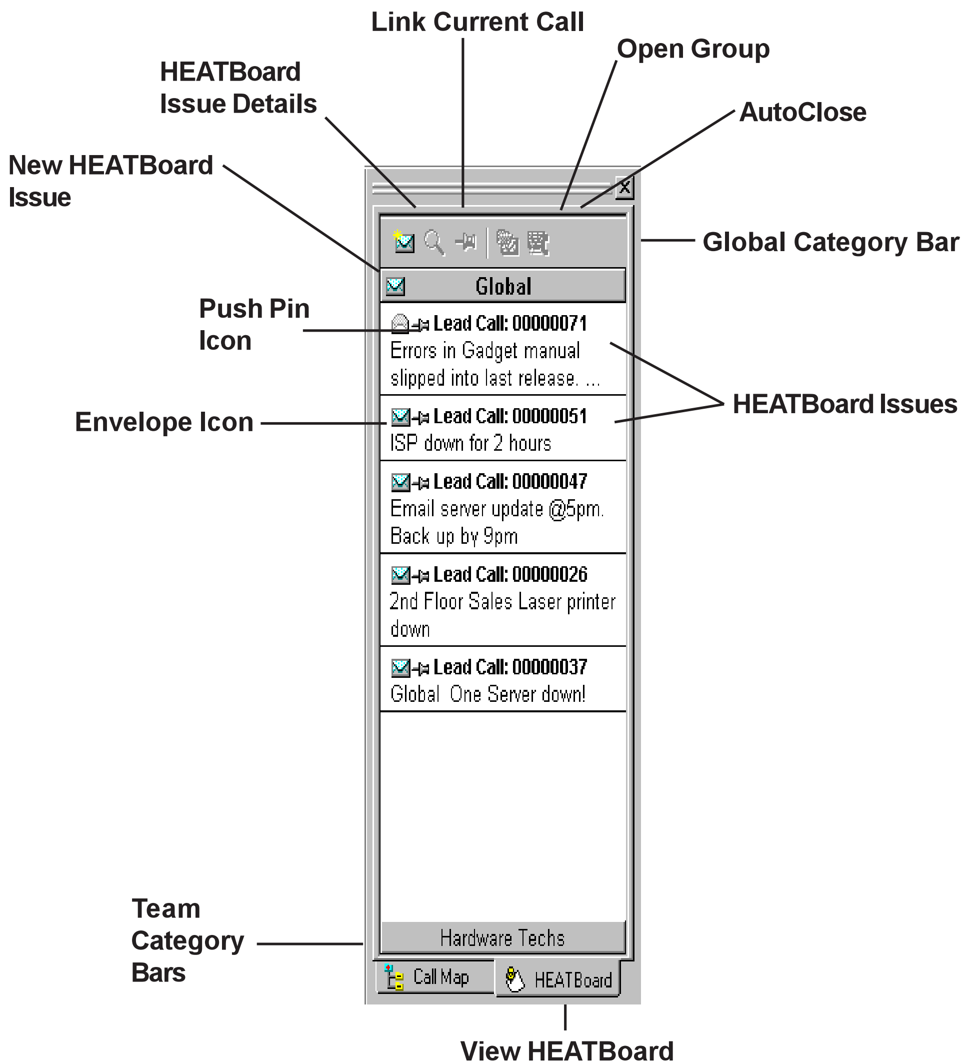




Using HEATBoard Controls

HEATBoard has several category bars, buttons, and links. This page explains their functions.

- **New HEATBoard Issue** creates an issue.
- **HEATBoard Issue Details** opens the highlighted issue.
- **Link Current Call** links the current Call Record to the highlighted issue. A call can be linked to only one HEATBoard issue.
- **Open Group** opens the group of calls linked to the highlighted issue.
- **AutoClose** closes all calls linked to the issue when it is resolved.
- **Team Category Bars** display issues for a specific team.
- **Global Category Bar** displays global issues.
- **Open Envelope** icon indicates the issue has been read. A **Closed Envelope** icon indicates the issue has not been read.
- **Push Pin** icon indicates calls are linked to the issue.



Viewing Issues

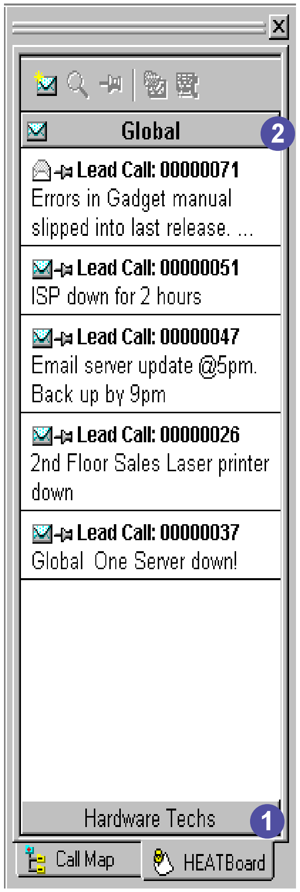
The HEATBoard is team-based. It can display issues that are available for your team or the global audience.

A closed envelope indicates there are new, unread issues posted.

An open envelope icon on a team category bar indicates there is an open issue for the team.

View an Issue

1. To view issues posted by your team, click a **Team** tab. To view issues posted globally, click the **Global** tab.
2. To view issue details, double-click the issue.



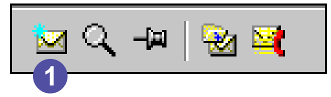
Creating New Issues

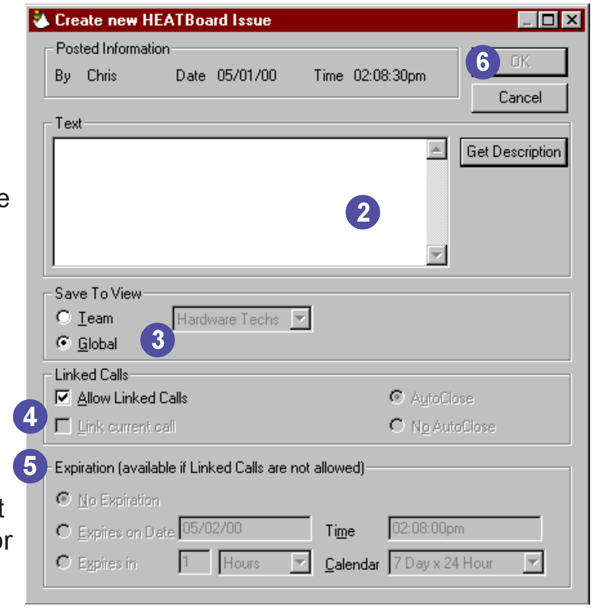
Issues that might affect a number of users should be posted immediately to the HEATBoard to alert other technicians about the problem and also let them link all related calls to the issue.

For example, if a defective part ships, a new issue can be created that includes a description of the problem, such as "defective stitching on gadget..." Because the entire support center should know about the issue, it is marked for "Global" viewing.

Create a New Issue

1. Click the **New HEATBoard Issue** button on the **HEATBoard** toolbar.
2. Type a **description** of the issue in the **Text** field.
3. Select a **view**. The view is the audience who can view this issue. If you select **Team**, select a team from the drop-down box.
4. Mark **Allow linked calls** to link calls to this issue.
5. If you choose not to **Allow Linked Calls**, you can select an expiration time and date for this issue.
6. Click **OK**.



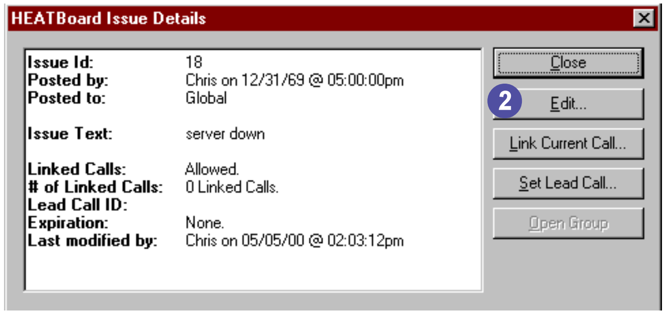


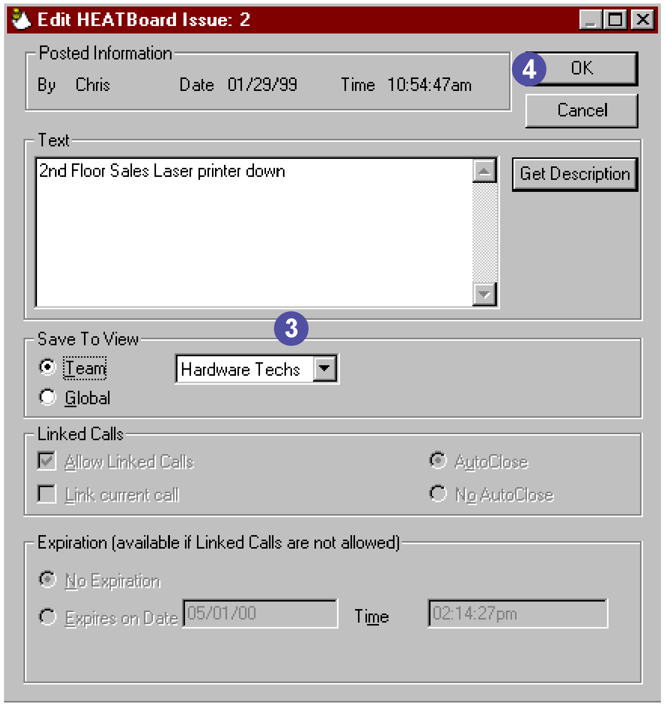
Editing Issues

After an issue is created on the HEATBoard, it can be edited when information needs to be added or deleted.

Edit a Issue

1. Double-click an **issue** on the HEATBoard.
2. Click Edit.
3. Edit any active **fields**.
4. Click OK.





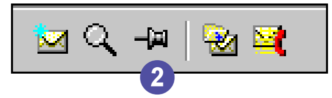
Linking Calls

Often a series of calls are received about the same issue. These calls can be grouped on the HEATBoard and linked to the issue. Calls linked to an issue can be opened in a group and AutoClosed when the issue is resolved.

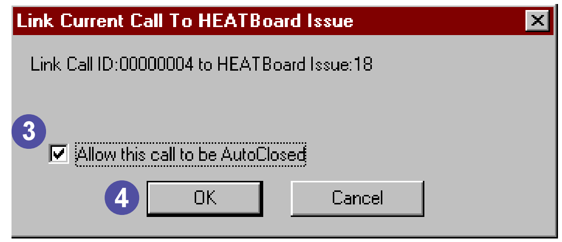
Linking a call makes it easy to keep track of all calls related to the same issue, as well as close the call when the problem is resolved.

A call can be linked to only one issue.

Link a Call From the Toolbar

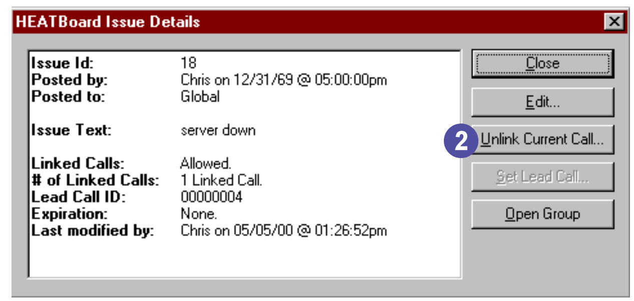


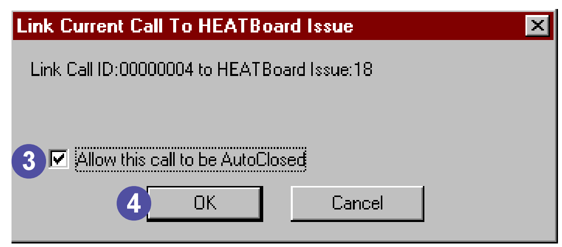
1. Select the **issue** from the HEATBoard.
2. Click the **Link Current Call button** on the HEATBoard toolbar.
3. Click Allow this call to be AutoClosed if you want to AutoClose this call when the issue is resolved.
4. Click OK.



Link a Call From the Issue Dialog Box

1. Double-click an **issue** on the HEATBoard.
2. Click **Link Current Call.**
3. Click **Allow this call to be AutoClosed** if you want to AutoClose this call when the issue is resolved.
4. Click **OK**.





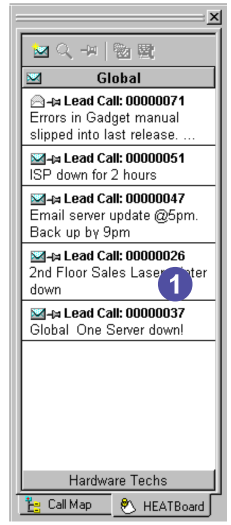
Unlinking a Call

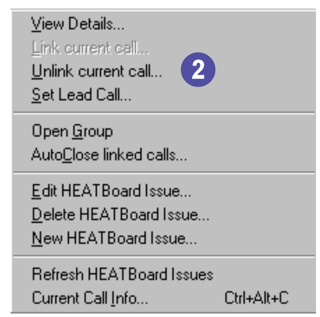
You can unlink a call if it was linked by mistake.

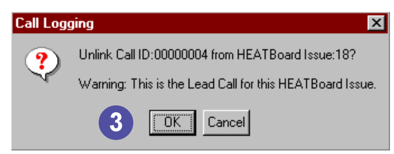
Before you attempt to unlink, the call you want to unlink must be the currently displayed call.

Unlink a Call

1. Right-click on an **issue** from the HEATBoard.
2. Select **Unlink current call.**
3. Click **OK**.







Setting the Lead Call

When a number of calls are linked to the same issue, you can set a Lead Call.

The first call linked to the issue is automatically designated as the Lead Call. You can, also, designate a different call in the issue group as the lead call.

A Lead Call acts as the single point of information for the issue, as well as a repository for new information. Any information about the issue should be entered into the Lead Call.

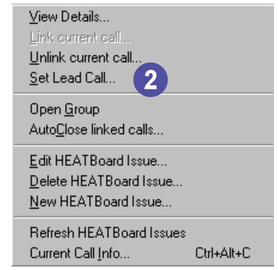
Some issues may have a number of linked calls. Using the Lead Call as your source of information lets you quickly enter closing information, copy it to linked calls and close the calls in the group. If you randomly enter information into any call in the group, you may not be able to locate that information quickly.

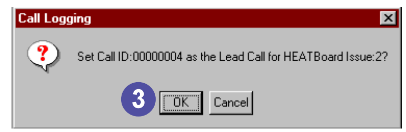
TIP

When you open the group of linked calls, the lead call is automatically selected.

Set the Lead Call from the Menu

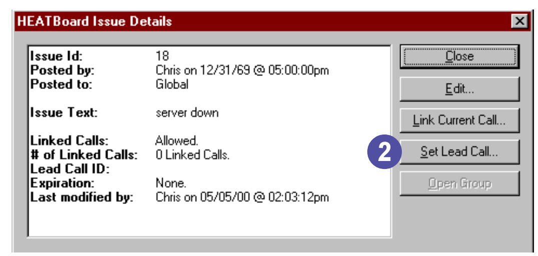
1. Right-click on an **issue** from the HEATBoard.
2. Select **Set Lead Call**.
3. Click **OK**. The currently displayed call is now designated as the lead call.

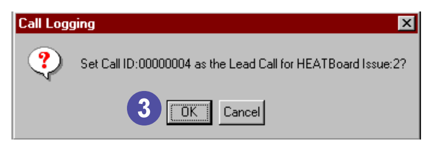




Set the Lead Call from the Issue Dialog Box

1. Double-click an **issue** on the HEATBoard.
2. Click **Set Lead Call**.
3. Click **OK**. The currently displayed call is now designated as the lead call.



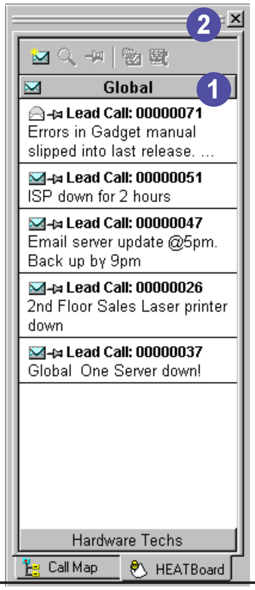


Opening an Issue Group

Calls linked to an issue on the HEATBoard are grouped together. You can open a group to review the calls, add additional information, or AutoClose the group when the issue is resolved.

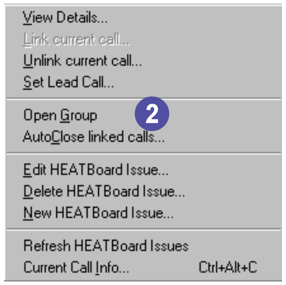
Open an Issue Group from the Toolbar

1. Select an **issue** from the HEATBoard.
2. Click the **Open Group** button.



Open an Issue Group from the Menu

1. Right-click on an **issue** from the HEATBoard.
2. Select **Open Group**.



AutoClosing Calls

After an issue is resolved, all the calls linked to the issue can be AutoClosed. This lets you close all calls for this issue in one step.

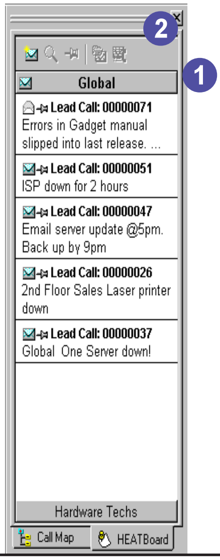
Calls must be marked as available for AutoClosing when they are linked to the issue. If you did not select the "Allow this call to be AutoClosed" check box when the call was linked to the issue, it is not available for AutoClosing . You must manually close the call.

SEE ALSO

Linking a Call, in this chapter.

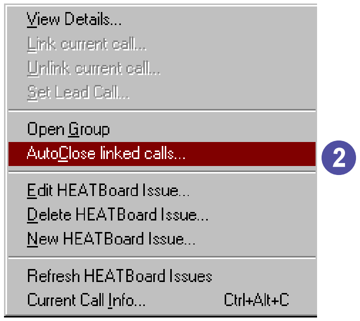
AutoClose a Call Group from the Toolbar

1. Select an **issue** from the HEATBoard.
2. Click the **AutoClose** button.



AutoClose a Call Group from the Menu

1. Right-click on an **issue** from the HEATBoard.
2. Select **AutoClose linked calls.**



3

Customer Records

IN THIS CHAPTER

Customer Records contain information about customers, work environments, call histories, and other details. Call Logging gives you an overview of the records and access to their details.

Customer Records are made up of four records: Profile, Contacts, Configuration, and Call History.

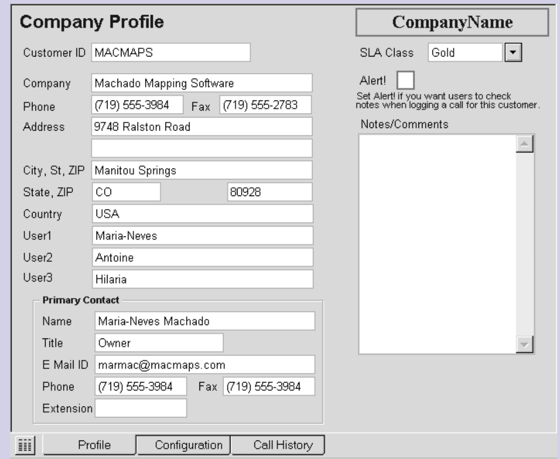
- **Profile** — Profile records contain background information about your customers, such as Company Name, Contact Name, Phone Number, and Address.
- **Contacts** —Contact records contain a list of contacts associated with your customer.
- **Configuration** — Configuration records contain information about the equipment and software each customer uses.
- **Call History** — Call History displays a list of the support center calls your customer has made.

This section discusses these records and explains how to view, create, edit, and delete Customer Records.

Viewing Customer Records

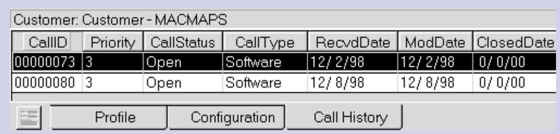
The four Call Logging Customer Records are Profile, Contacts, Configuration, and Call History. A tab contains information if a check mark appears on it. To view any of these records from a Call Record, select **Profile**, **Contacts, Configuration**, **or Call History** from the **Customer** menu.

Each Customer Record has Profile, Contacts, Configuration, or Call History tab along the bottom of the screen. To view the records, click the appropriate tab. The information may appear as a form (form view) or a list (grid view). To change the view, click the **Grid View-Form View** button in the lower left corner of the screen.



Profile Tab, Form View

Configuration Tab, Grid View



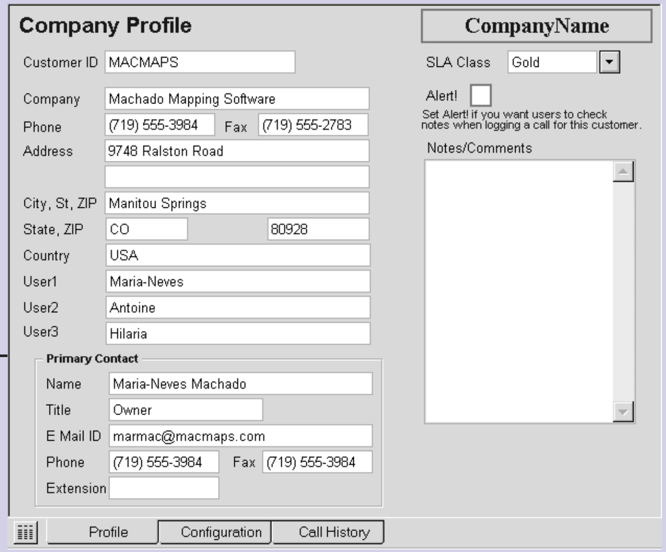
Call History Tab, Grid View

Profile Records

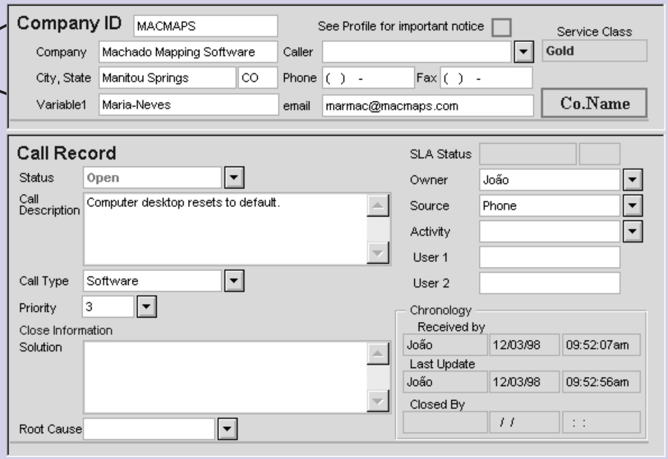
The Profile Record

A Profile Record contains all relevant information about a customer or employee, such as name, telephone number, location, e-mail address, and notes. You may edit Profile information at any time. Your system administrator controls the rights to edit this information.

Profile Record



Profile Subset



The Profile Subset

The top portion of a Call Record is called the Profile Subset. The Profile Subset displays selected customer information, such as company name, contact, and telephone number of the caller. The System Administrator selects the information to be displayed. The Profile Subset remains displayed when you switch tabs to Call Log, Detail, Assignment, or Journal.

Creating Profile Records

You must create a Profile Record for each new customer or employee. You will use this Profile Record for all subsequent calls from this customer.

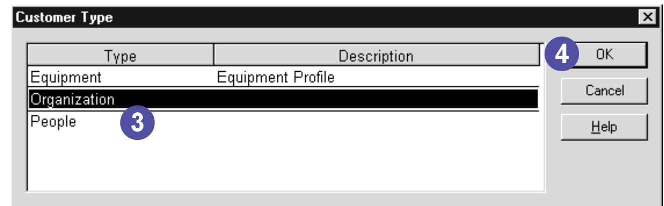
Your system administrator controls security rights to create Profile Records.

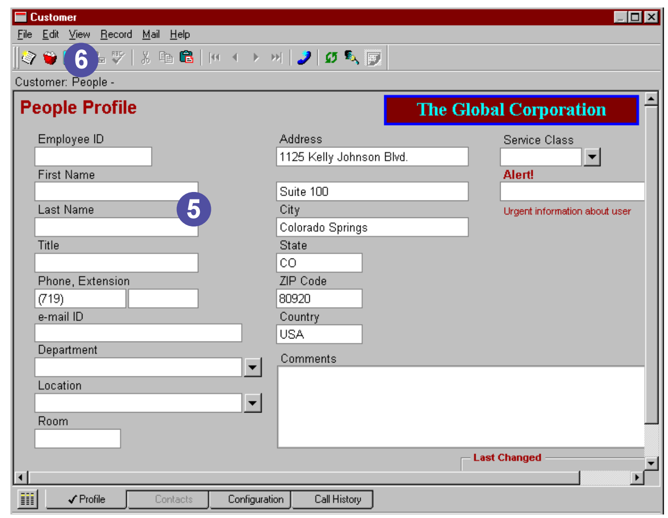
TIP

A lightning bolt icon on the Status Bar identifies a field that must be filled in.

Create a Profile Record

1. Select **Profile** from the **Customer** menu.
2. Select **New** from the **Record** menu.
3. Select the **Customer Type**.
4. Click **OK**.
5. Fill in each **field** of the Profile Record.
6. Click the **Save Record** icon.





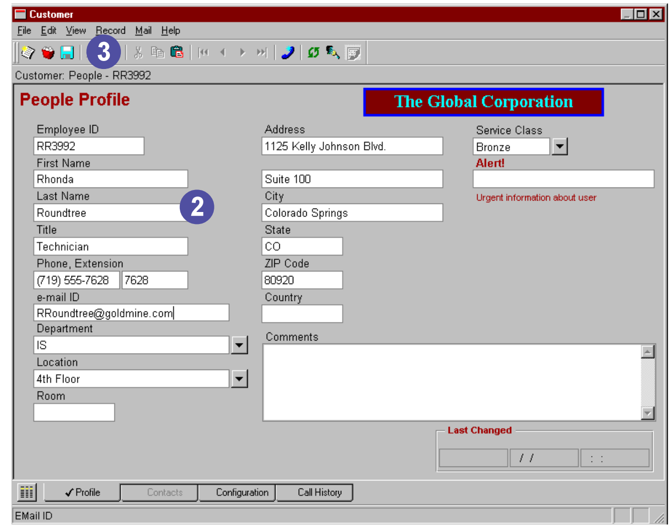
Editing Profile Records

When a customer's data changes, you will want to edit the customer's Profile Record.

Your system administrator controls security rights to edit Profile Records.

Edit a Profile Record

1. Select **Profile** from the **Customer** menu.
2. Edit the **Profile Record**.
3. Click the **Save** icon.



Deleting Profile Records

If your support center no longer requires a customer profile in the database, you can delete it (depending on your security rights).

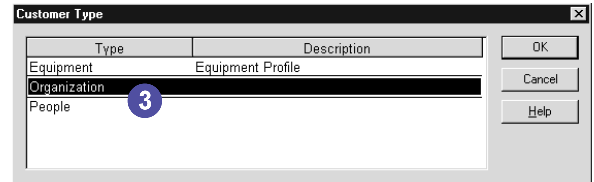
Deleting a customer profile cannot be reversed. Information in a Profile Record may be linked to other records in your HEAT database. Not all users have security rights to delete customer profiles. Always get permission from your system administrator before you delete a Profile Record.

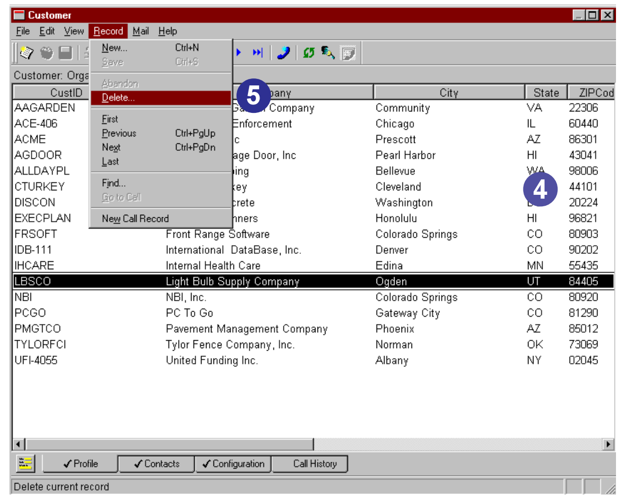
Be sure not to delete the Profile Record of an open Call Record.

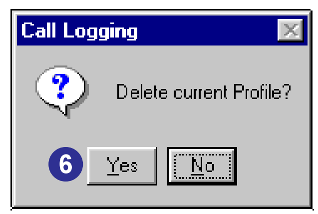
Your system administrator controls security rights to delete Profile Records.

Delete a Profile Record

1. Close all open Call Groups.
2. Select **Profile** from the **Customer** menu.
3. Select the **Customer Type**.
4. Select the **Profile Record** to delete.
5. Select **Delete** from the **Record** menu.
6. Click **Yes**.





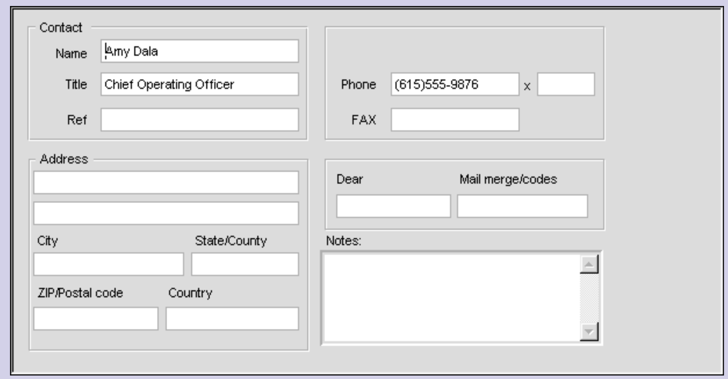


Contact Records

The Contact Records displays a list of contacts associated with a particular customer. You can use this information to monitor and organize contacts more efficiently.

Note: The Customer Type must be associated with a Contact Table before the contact information can be viewed. If an external Contact Table is being used, information can be edited and added, but not deleted. See your system administrator for more information.

Contact Record (Grid View)



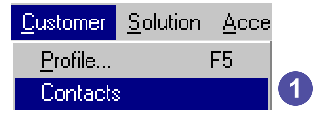
Contact Record (Form View)

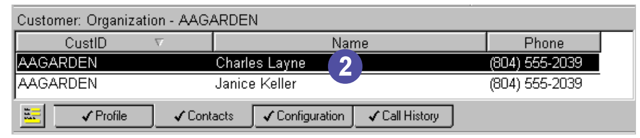
Viewing Contact Records

You can view all contact information available for a particular customer. This option is only available if your system administrator has associated your particular Customer Type with a Contact Table.

View the Current Customer's Contact Records

1. Select **Contacts** from the **Customer** menu.
2. Double-click the record you want to view.





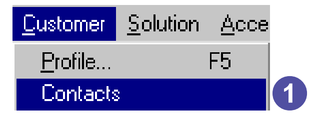
Contact Record

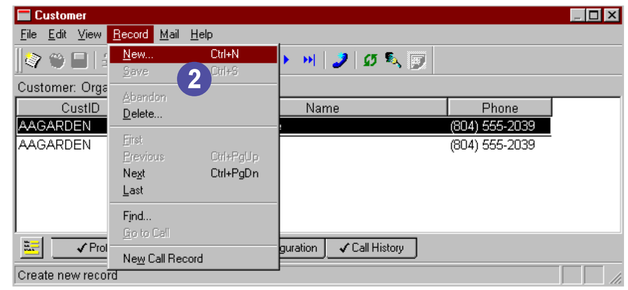
Adding Contact Records

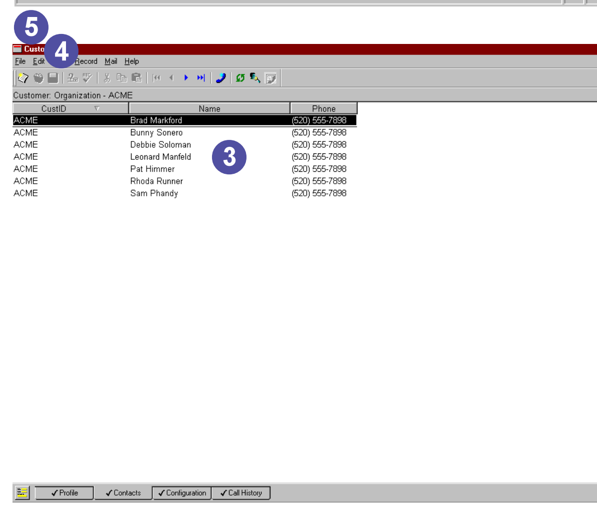
You can add new contacts associated with a particular customer.

Add a Contact Record

1. Select **Contacts** from the **Customer** menu.
2. Select **New** from the **Record** menu in the Customer Window.
3. Type the appropriate information in the Contacts form.
4. Click the **Save** icon.
5. Click **File>>Close** to close the record.





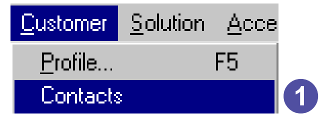


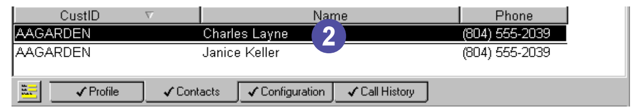
Editing Contact Records

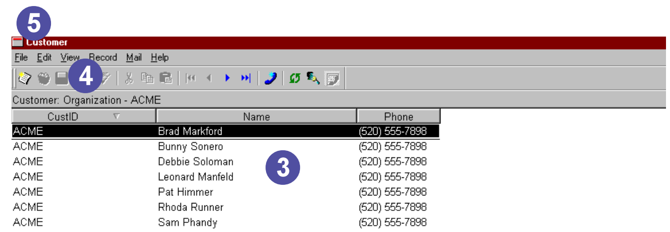
You can update contacts associated with a particular customer by editing the Contact Records.

Edit a Contact Record

1. Select **Contacts** from the **Customer** menu.
2. Double-click the record you want to edit.
3. Edit the record.
4. Click the **Save** icon.
5. Click **File>>Close** to close the record.





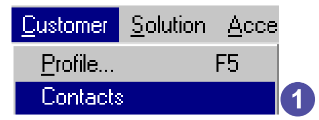


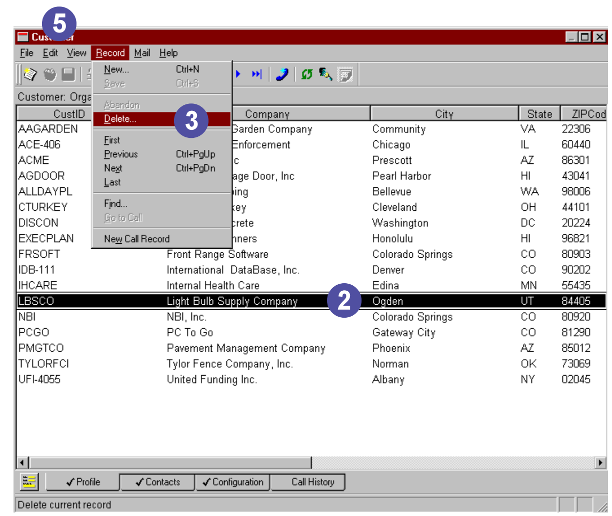
Deleting Contact Records

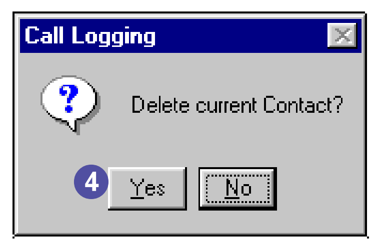
If a record associated with a customer is no longer valid, you can delete it from the Contact Records.

Delete a Contact Record

1. Select **Contacts** from the **Customer** menu.
2. Select the **record** you want to delete.
3. Select **Delete** from the **Record** menu.
4. Click **Yes**.
5. Click **File>>Close** to close the record.



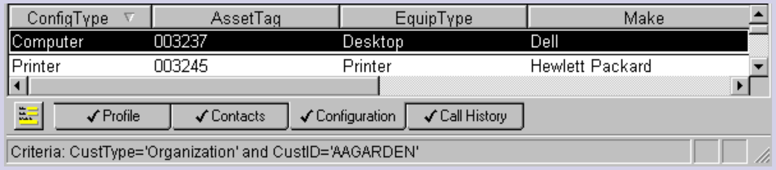




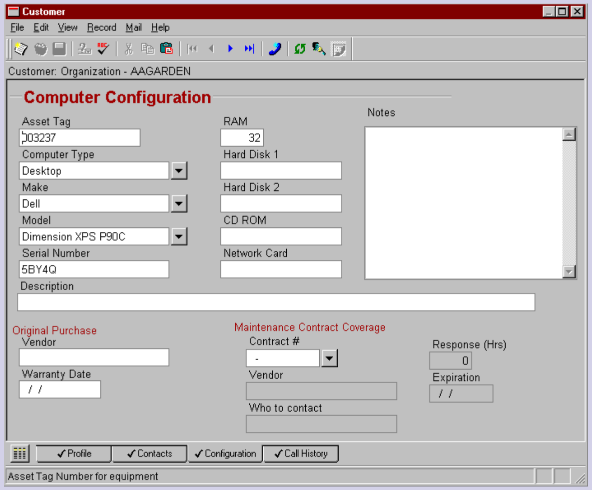
Configuration Records

Configuration Records contain information about a customer's environment configuration. The records appear as rows in a Configuration Table.

A Configuration Table contains one or more Configuration Records. Each element in the customer's environment appears as a record in the Configuration Table. With the information in this table you can track each element of your customer's system.



Configuration Record (Grid View)



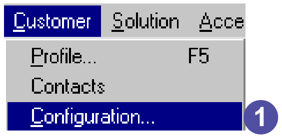
Configuration Record (Form View)

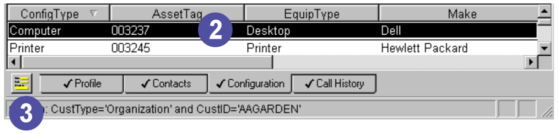
Viewing Configuration Records

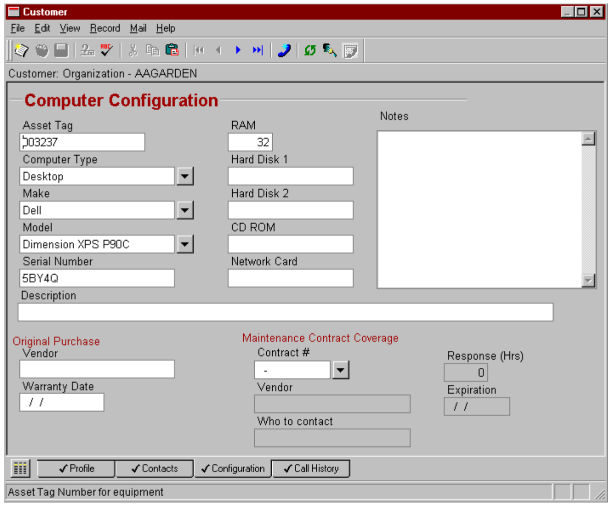
When customers call about problems, use the customers' Configuration Records to view details about their system.

View Configurations for the Current Call Record

1. Select **Configuration** from the **Customer** menu.
2. Highlight the record you want to view.
3. Click the **Form View** icon.







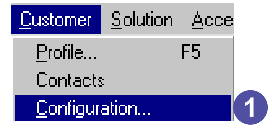
Configuration Record

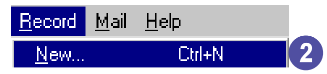
Adding Configuration Records

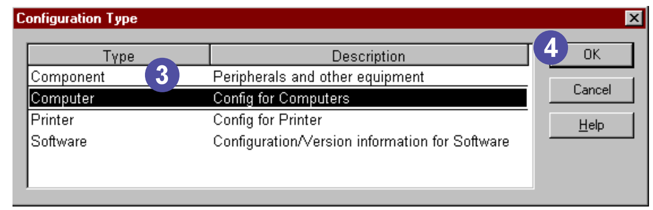
When a customer adds a computer, printer, peripheral, software application, or other component to the system, you will want to add a Configuration Record for it.

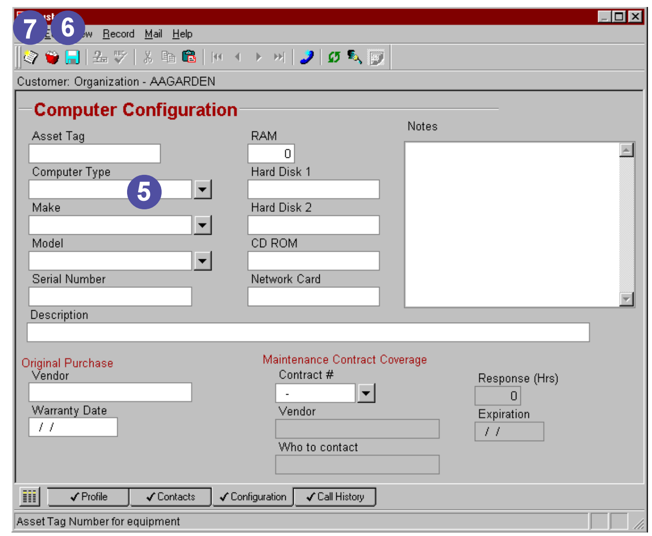
Add a Configuration Record

1. Select **Configuration** from the **Customer** menu.
2. Select **New** from the **Record** menu.
3. Select a **Configuration Type**.
4. Click **OK**.
5. Type the appropriate information in the **Configuration** form. Each form is different and requires different information.
6. Click the **Save** icon.
7. Select **File>>Close** to close the record.







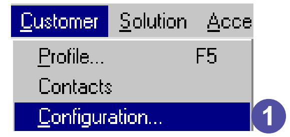


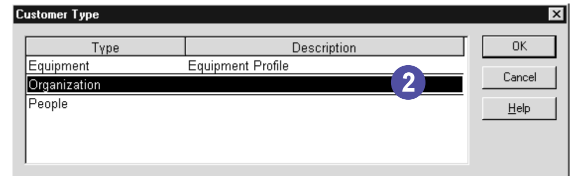
Editing Configuration Records

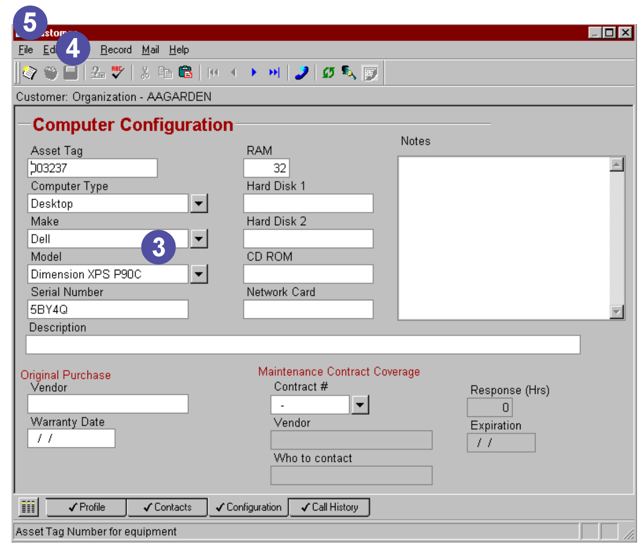
You can revise information about a customer's system by editing the Configuration Record.

Edit a Configuration Record

1. Select **Configuration** from the **Customer** menu.
2. Double-click the **record** you want to edit.
3. Edit the **record**.
4. Click the **Save** icon.
5. Select **File>>Close**.







Copying and Moving Configuration Records

You can copy and move Configuration Records as equipment is moved in or out for repair.

You can move records when a customer transfers parts of a system to a different department or different customer. You can copy records if more than one department or customer shares an element.

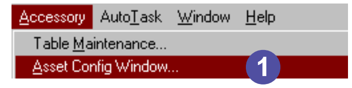
TIP

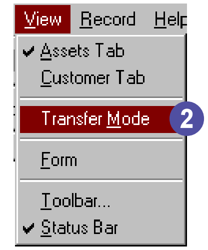
Customer Type 1 is the open Call Record customer and can provide or receive the transferred element.

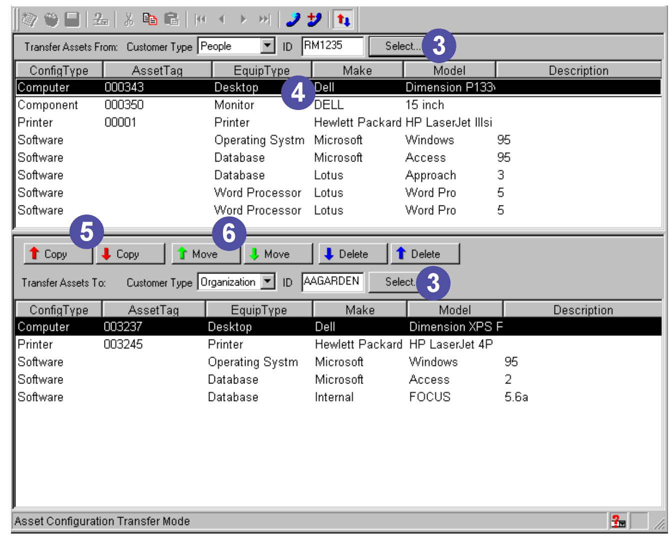
Copy or Move a Configuration Record

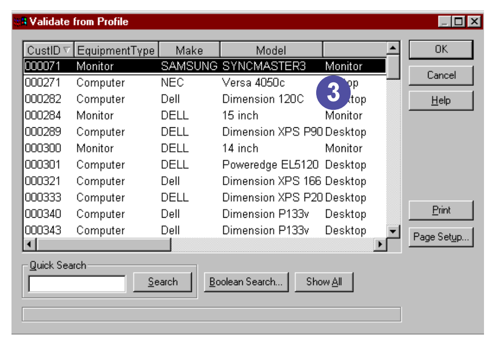
1. Select **Asset Config Window** from the **Accessory** menu. Configuration information from the open Call Record appears in the **Accessory Configuration Maintenance** form.
2. From the View menu, select **Transfer Mode** or select the **Transfer Asset Info** icon from the toolbar.
3. Select the **Customer** who will provide or receive the transferred elements.
4. In one of the tables, highlight the Record to be copied to the other table.
5. Click **Copy** ↓ or **Copy** ↑ to copy the record to the other table,

   or,
6. Click **Move**↓ or **Move**↑ to move the record to the other table.
7. Select **File>>Exit**.







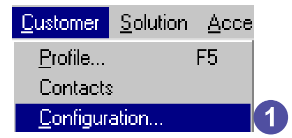


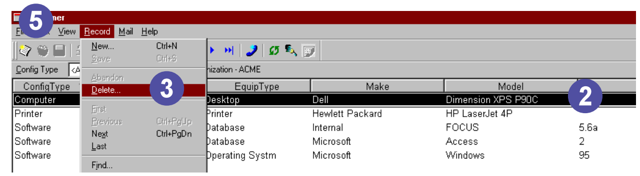
Deleting Configuration Records

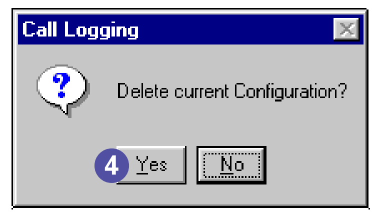
If a customer removes an element of the system, you can remove the element's Configuration Record.

Delete a Configuration Record

1. Select **Configuration** from the **Customer** menu.
2. Select the **record** you want to delete.
3. Select **Delete** from the **Record** menu.
4. Click **Yes**.
5. Select **File>>Close**.







Creating a call for an asset

You can create a call for the customer who owns the current asset from the Asset Config Window>>Record menu.

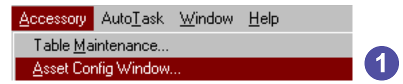
This creates a call for the customer who owns the current asset and transfers the asset's information to the new call record.

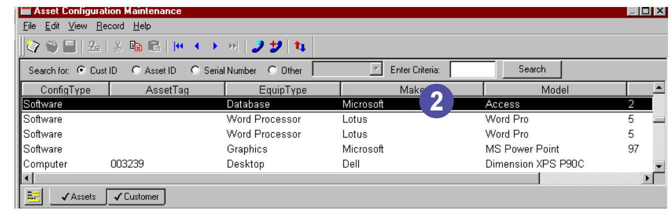
Create a call for a current asset

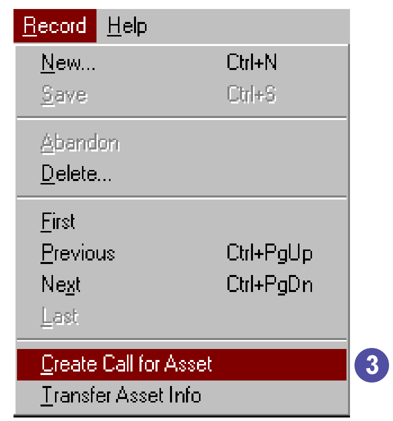
1. Select **Asset Config Window** from the Accessory menu.

2. Select the **asset record** to create a call record for.

3. Select **Create Call for Asset** from the Record menu to open the Call Record.







Transferring Asset Information to the Current Call Record

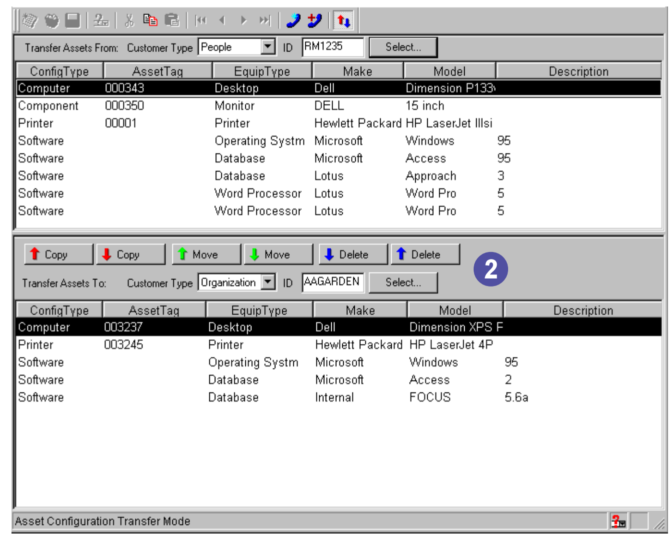
You can transfer an asset's information to the current Call Record.

Transfer Asset Information to the Current Call Record

1. Select **Asset Config Maintenance** from the **Accessory Menu**.

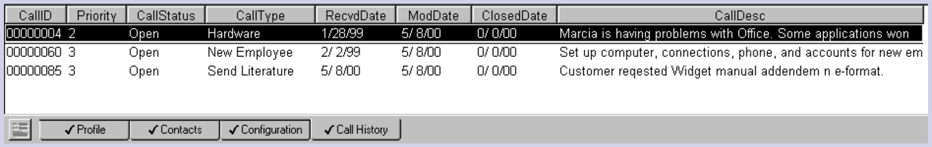
2. Select the **Asset Record** you would like to transfer.

3. Select **Transfer Asset Info** from the **Record menu**.



Call History

The Call History Record displays all Call Records for the customer. You can use this information to determine if the customer's call has a Call Record or requires a new one. The information shows how often the customer calls and the kinds of calls the customer makes.



CallID	Priority	CallStatus	CallType	RecvdDate	ModDate	ClosedDate	CallDesc
00000004	2	Open	Hardware	1/28/99	5/ 8/00	0/ 0/00	Marcia is having problems with Office. Some applications won
00000060	3	Open	New Employee	2/ 2/99	5/ 8/00	0/ 0/00	Set up computer, connections, phone, and accounts for new em
00000085	3	Open	Send Literature	5/ 8/00	5/ 8/00	0/ 0/00	Customer reqested Widget manual addendem n e-format.

Call History (Grid View)

Viewing Call History

You can view a customer's Call History before you create a Call Record. The current call may already exist on a Call Record.

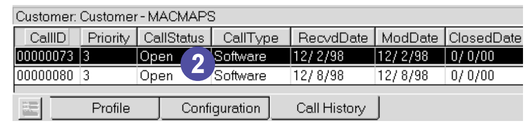
You can also find out what types of calls the customer makes and if this problem has occurred previously.

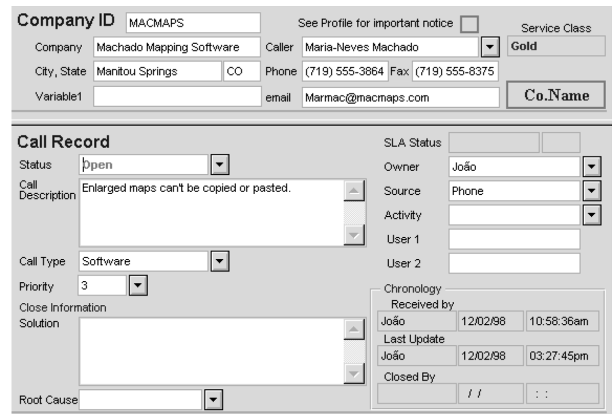
TIP

*You can view a customer's Call History before creating a new call. Select **Customer>>Search**, enter profile criteria and select Search. Next, select the Call History tab. From there, a call may be selected by double-clicking on the record or a new call can be created by clicking on the New Call icon.*

View the Current Customer's Call History

1. Select **Call History** from the **Customer** menu.
2. Double-click the **Call Record** you want to view.





Selected Call Record

4

Call Groups

IN THIS CHAPTER

A Call Group is a collection of Call Records that may or may not have similarities. A typical Call Group has calls that have one or more things in common. For example, let's assume that you want to see all the Open Call Records that are for defective parts. You can easily create a Call Group that has only Open Calls with a call type of "Product Issue."

Another type of Call Group is a Hot List. It contains calls that have been manually grouped together. A Hot List is a collection of Call Records that may not have any similarities. You can create a hot list and manually add any number or type of calls you wish. Hot Lists can be created for personal, team, or global viewing.

A Call Group can include one or more calls, and you can create as may Call Groups as you wish. You can view or work with the Call Records within a Call Group, search through them for various characteristics, and run reports or AutoTask actions against them.

About Call Groups

A Call Group is a collection of Call Records. You can have as many Call Groups as you want. All the data at your disposal resides in the open Call Group. You can view or work with these Call Records, search through them for various characteristics, and run AutoTask actions against them.

Predefined Call Groups

The *Demo* database contains several predefined Call Groups that you can use or modify. Examples include:

- All Calls
- All Active Calls
- Open Calls for Type

Work Group contains all Call Records you have created, modified or opened during your current working session. Use Work Group for quick access to your current work session's Call Records.

Calls on Hold contains all unsaved Call Records you have placed on hold. HEAT creates this Call Group when you put a Call Record on hold. When you save a Call Record, it is removed from Calls on Hold.

Creating Call Groups

You can create a Call Group to contain all Call Records that share one or more common features. Carefully created Call Groups can help you work more efficiently. For example, you can group your unacknowledged calls together, or make a group of all calls from a certain customer.

Hot Lists

A Hot List is a special type of call group. Calls in a typical Call Group have similarities such as call type or call status, but a Hot List is a collection of unrelated calls that are manually added. You can include any call type or number of calls you wish.

Every user has a personal hot list called "My Hot List," available only to that user. To use My Hot List, add calls to My Hot List. You might want to use My Hot List as a "To Do" list that includes any calls you need to work on that day.

You can also create other personal Hot Lists that are accessible only to you, or create Hot Lists that can be shared among teams or globally. Some Hot Lists may be restricted to specific teams. For example, you can create a Supervisor Hot List that can only be accessed by the Supervisor team members.

Using Call Groups

What can you do with Call Groups?

- Schedule your work to make sure it gets completed on time.
- Organize your work by priority to make sure the most important tasks get done first.
- Track your work according to various criteria.
- Alert you to new calls, calls from important customers, or return calls.

Opening Call Groups or Hot Lists

Call Groups and Hot Lists are saved to a view. The “view” is the audience who can access the Call Group or Hot List.

When you select a view, the window displays all the Call Groups and Hot Lists contained in the view.

The icon next to the Hot List indicates the view defined for the Hot List.

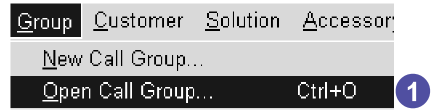
Personal View: Available to you only.

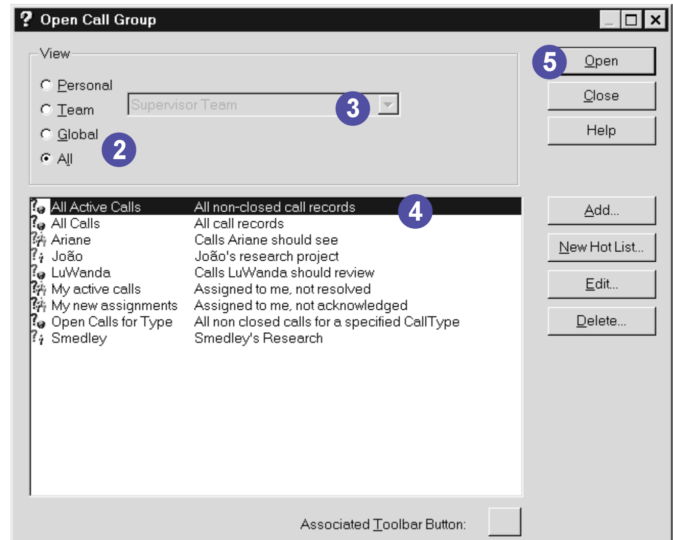
Team View: Available to a specific team.

Global View: Available for global viewing.

Open a Call Group or Hot List

1. Select **Open Call Group** from the **Group** menu.
2. Select the **view** containing the Call Group you want.
   - The **Personal** view displays your personal Call Groups and Hot Lists.
   - The **Team** view displays Call Groups and Hot Lists for the selected Team.
   - The **Global** view displays all Global Call Groups and Hot Lists.
   - The **All** view displays all Call Groups and Hot Lists available to you from the personal and global views and from your primary team.
3. If you select the **Team** view, select a Team from the drop-down list.
4. Select a **Call Group**.
5. Click **Open**.





Using the Calls on Hold Call Group

You can put a Call Record on hold when you have not saved the Call and you want to create another Call Record. The Calls on Hold Call Group is created when you put a Call Record on hold. You can access Calls on Hold from the Group menu.

A Call Record on hold is not saved in the database. If the System Administrator commits an edit set, you will lose all Call Records on hold.

TIP

A Call can be put on hold, even if all of the required information has not been entered.

Put a Call Record on Hold

1. Select **Put Call on Hold** from the **File** menu.

Open the Call Group, Calls on Hold

1. Select **Calls on Hold** from the **Group** menu.

Creating Call Groups from a Boolean Search

You can create a call group from Boolean Search results. A Boolean Search is different from a Simple Search because Boolean Searching lets you use more than one condition.

For example, with a Boolean Search you can locate all records that all meet the following criteria:

- Call Record must be **Open**, AND
- Call Record must have **"hardware"** as the call type, AND
- Call Record must have **"Chris"** as the tracker.

If a call record does not meet ALL of the above criteria, it is not added to the group.

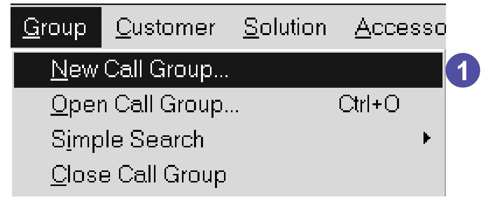
The results of a Boolean Search can be converted into a Call Group.

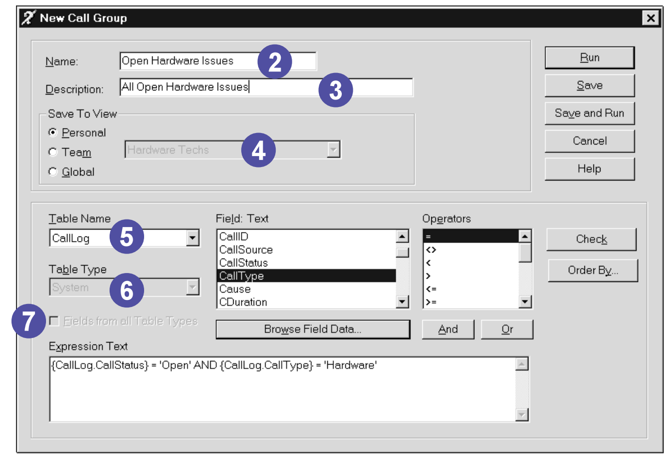
SEE ALSO

Boolean Search, Chapter 5 and @Functions, Chapter 8 and Appendix C.

Create a Call Group from a Boolean Search

1. Select **New Call Group** from the **Group** menu.
2. Type a **name** for the group.
3. Type a **description** for the group.
4. Choose a **view** from the **Save to View** box.
5. Select a **table** or **@function** from the **Table Name** drop-down list. (The Table Name List includes the tables in Call Logging as well as the @function.)
6. Choose a **Table Type.** (This field is available only if you selected a Detail, Profile or Subset table in step 5.
7. Click the **Fields From All Table Types** check box (if available) to include **all** the fields from **all** the available table types in your search criteria.
8. Go to next page.





SEE ALSO

Boolean Search, Chapter 5.

9. Double-click a **field** in the **Field Text** box. This becomes the first part of the Boolean expression.

10. Double-click an **operator** in the **Operators** list.

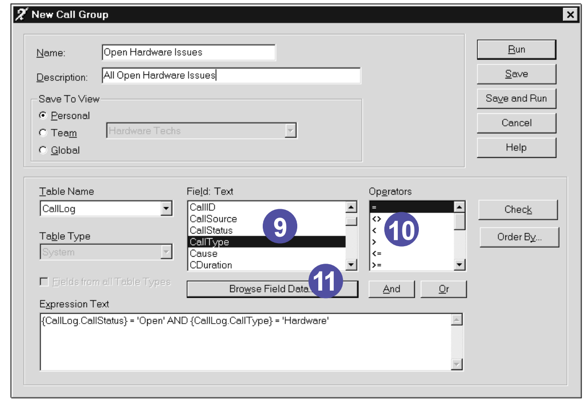
11. Click **Browse Field Data**.

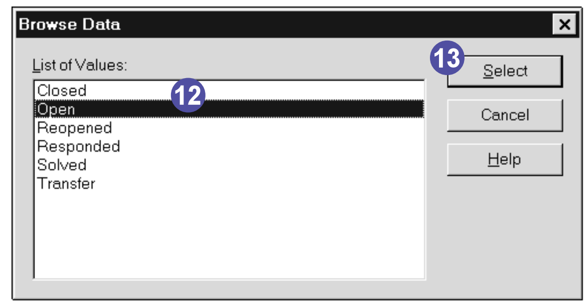
12. Choose a **value** from the list (you can also type your own value into the **Expression** box).

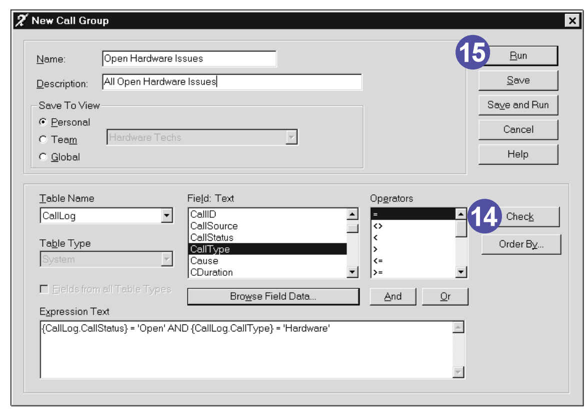
13. Click **Select**.

14. Click **Check** to verify that your expression text is correct.

15. Click **Run** or add **multiple conditions** as described on the next page.







SEE ALSO

Boolean Search, Chapter 5.

16 Click **AND** to add another statement. For example, **CallLog.CallStatus='Open' AND CallLog. CallType='Hardware'**

17 Click **OR** to add a varying statement. For example, **CallLog.CallStatus= 'Reopened' OR CallLog. CallStatus='Open'**

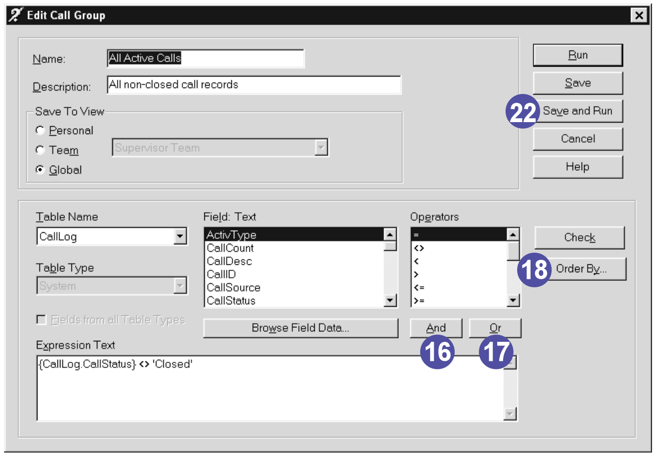
18 Click **Order By**.

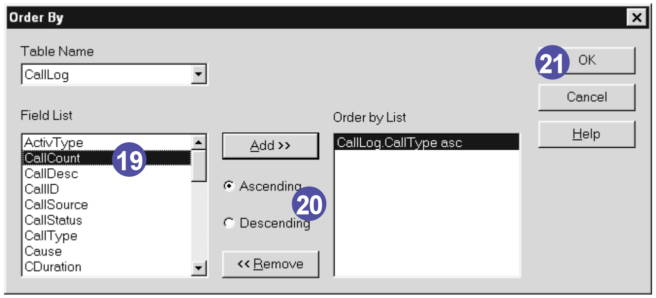
19 Double-click one or more names from the **Field List**.

20 Select **Ascending** or **Descending** order.

21 Click **OK**.

22 Click **Save and Run**.





Creating Call Groups From a Simple Search

A Simple Search is a query based on one condition. For example, you can search for all the open Call Records.

To run a Simple Search, select your query from a list of predefined queries. Your system administrator sets up the predefined queries. When you search within the group, the group is "narrowed" because HEAT looks for the search criteria and closes any other records that do not meet the criteria.

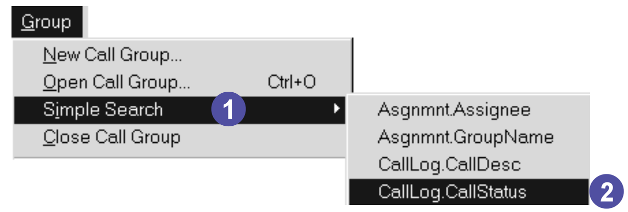
After running a Simple Search, the query results are a Call Group. HEAT searches within the selected Call Group for your new criteria and creates a new Call Group from the query results. The group you selected to search is retained.

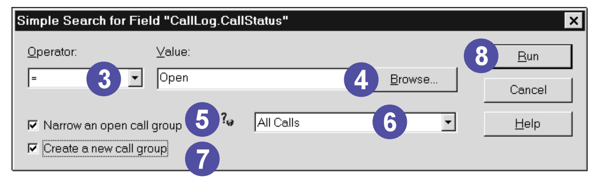
SEE ALSO

Simple Search, Chapter 5.

Create a Call Group from a Simple Search

1. Select **Simple Search** from the **Group** menu.
2. Choose a **search criteria**.
3. Select an **Operator** from the drop-down list.
4. Enter a **value** in the value field or click **Browse** to display a list of available values.
5. Click **Narrow an open call group** to search within a specific group.
6. Select the **search group** from the drop-down list.
7. Click **Create a new call group** to create a call group from the search results.
8. Click **Run**.



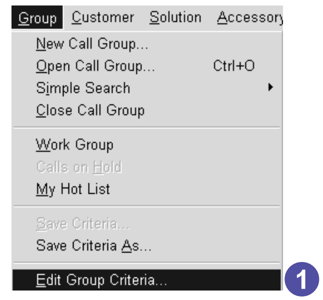


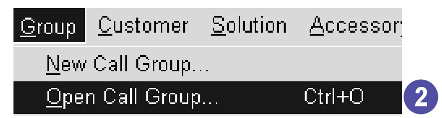
Editing Call Groups

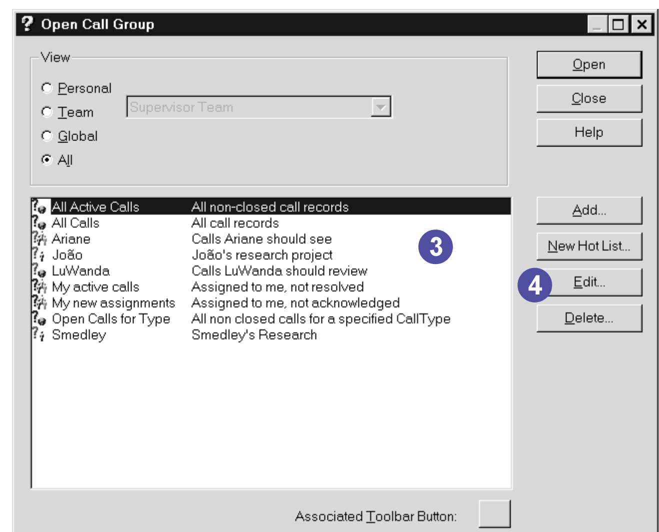
You can edit a Call Group's criteria. The editing screen displays the criteria set up when the Call Group was created. You can change the data in any field, or create a new Boolean Search.

Select a Call Group to Edit

1. To edit the displayed Call Group, select **Edit Group Criteria** from the **Group** menu.
2. To edit a closed Call Group, select **Open Call Group** from the **Group** menu.
3. Highlight a **Call Group to edit**.
4. Click **Edit**.



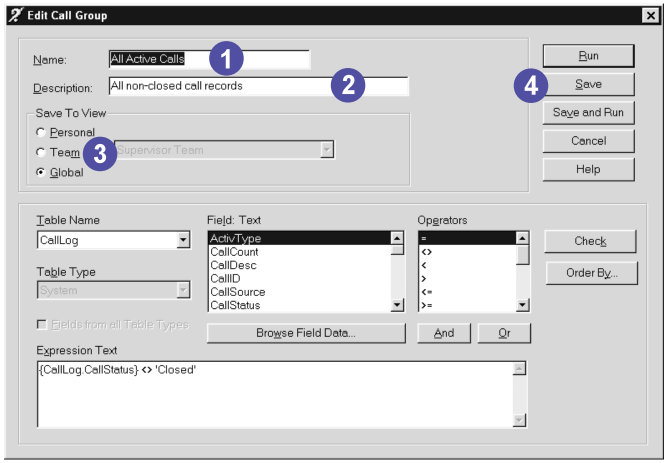




> **TIP**
>
> *You can edit Call Groups only if you have the appropriate security rights.*

Edit Call Group Criteria

1. To change the Call Group name, type a new **name** in the **Name** field.
2. To change the Call Group description, type a new **description** in the **Description** field.
3. To save the Call Group in a different view, select a new **view** in the **Save To View** box.
4. Click **Save**.



Editing Boolean Searches

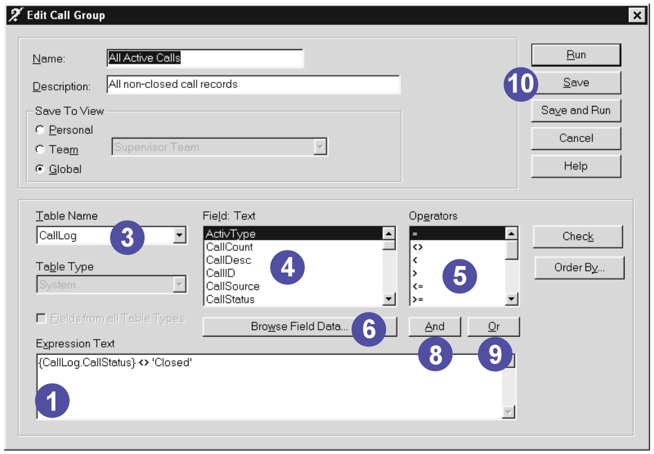
You can edit a Call Group’s Boolean Search criteria, which was set up when the Call Group was created.

TIP

Use the Edit feature to change one or two details. Edit should not be used to replace all the criteria.

Edit a Boolean Search

1. Highlight the expression **text** to be edited.
2. From your keyboard, press **Delete**.
3. Select a **table name**.
4. Double-click a **field text**.
5. Double-click an **operator**.
6. Click **Browse Field Data** if available.
7. Double-click **field data**.
8. Click **AND** to add another statement. For example, **CallLog.CallStatus=‘Open’ AND CallLog. CallType=‘Hardware’**
9. Click **OR** to add a varying statement. For example, **CallLog.CallStatus= ‘Reopened’ OR CallLog. CallStatus=‘Open’**
10. Click **Save**.



Saving New Search Criteria to New Call Groups

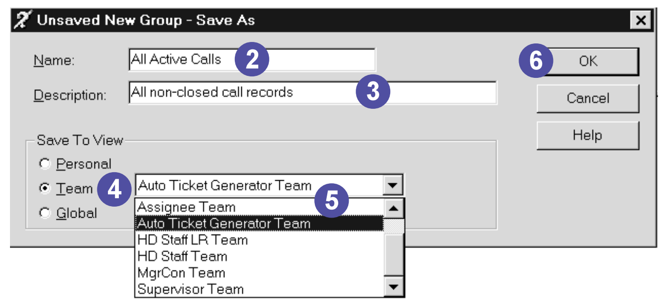
You can change the search criteria of a Call Group, then save the new criteria as a new Call Group. This feature creates a copy of an existing Call Group. The original Call Group is not deleted.

TIP

You can save a task in a personal view, a team view for a team to which you belong, or a global view. You can see all of these views by clicking "All," but you cannot save to the "All" view.

Save New Search Criteria to a New Call Group

1. Select **Save Criteria As** from the **Group** menu in an open Call Group.
2. Type the new **name**.
3. Edit the **description**, if necessary.
4. Click a **view** where you want to save this file.
   - The **Personal** view is accessible to you only.
   - The **Team** view is accessible only to members of the specified team.
   - The **Global** view is accessible to all HEAT users.
5. If you select the **Team** view, select a team from the drop-down list.
6. Click **OK**.



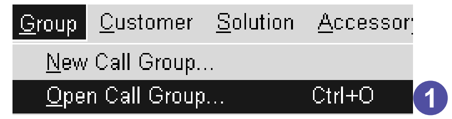
Deleting Call Groups

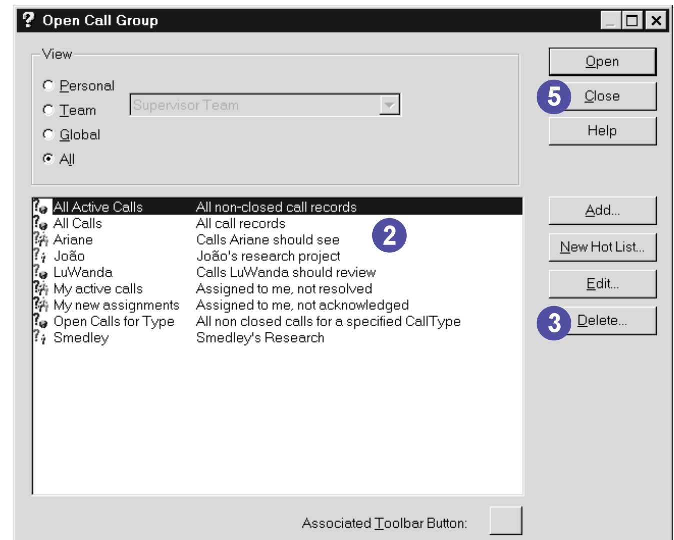
You can delete Call Groups, depending upon your security rights.

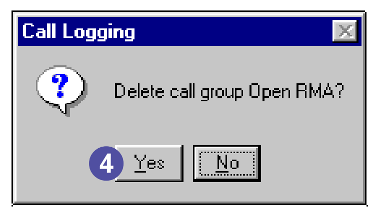
Use caution when deleting a Call Group. Once it is deleted, a Call Group cannot be restored.

Delete a Call Group

1. Select **Open Call Group** from the **Group** menu.
2. Highlight a **Call Group** to delete.
3. Click **Delete**.
4. Click **Yes**.
5. Click **Close**.







Creating Hot Lists

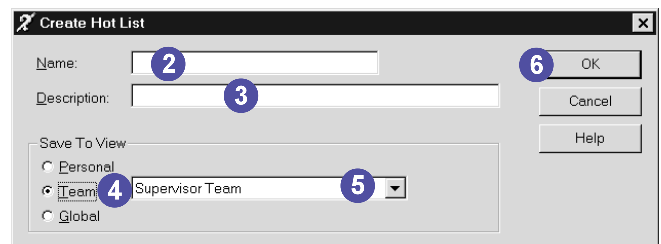
A Hot List is a special type of call group. While typical call groups have similarities such as call type or call status, a Hot List is a collection of unrelated calls that are manually added. You can include any call type or number of calls you wish. The calls do not need to have any similarities.

A personal Hot List called "My Hot List" is already set up on your system. All you need to do is add calls to it.

You can also create new Hot Lists for personal use or for viewing by specific teams or the global audience.

Create a Hot List from the Menu

1. Select **Add Call to Hot List>>New Hot List** from the **Group** menu.
2. Type a **name** for the new Hot List.
3. Type a **description** for the new Hot List.
4. Click the **view** where you want to save this Hot List.
   - **Personal View**: The Hot List is accessible to you only.
   - **Team View**: The Hot List can be viewed by members of the specified team.
   - **Global View:** The Hot List can be viewed by any GMSS user with Hot List access.
5. If you select **Team**, select a team from the drop-down box.
6. Click **OK**.



TIP

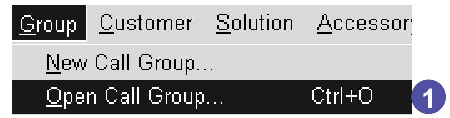
You can use My Hot List or create your own Hot Lists, depending on your security rights. You can create any number of Hot Lists, depending on the size of your database.

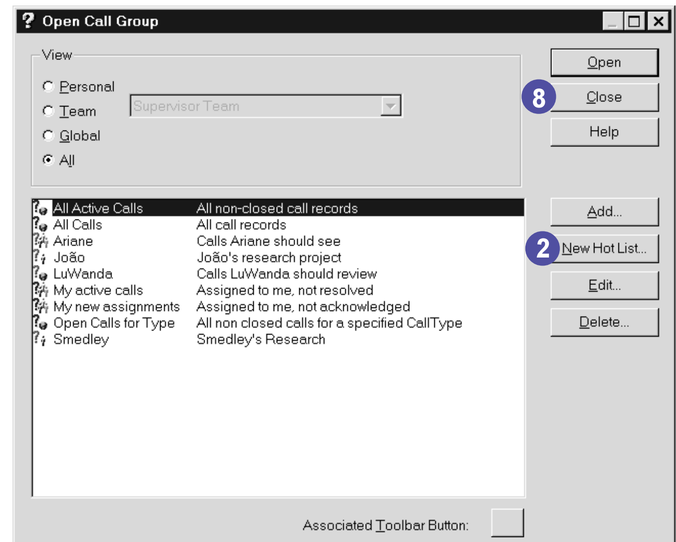
SEE ALSO

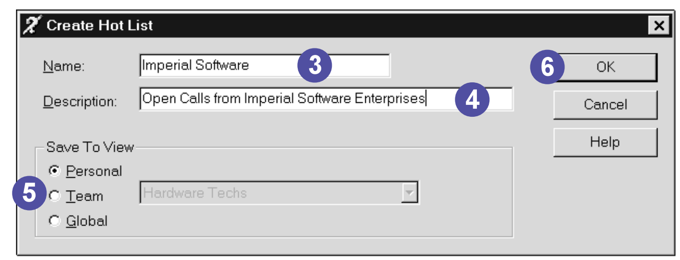
About Call Groups, in this chapter.

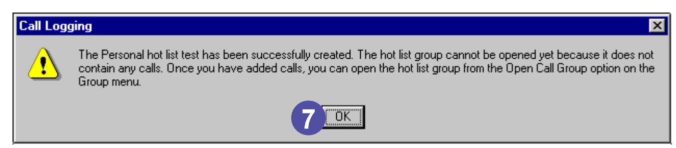
Create a Hot List from the Open Call Group Dialog Box

1. Select **Open Call Group** from the **Group** menu.
2. Click **New Hot List**.
3. Enter a name for the Hot List in the **Name** field.
4. Enter a description for the Hot List in the **Description** field.
5. Select the view where you want the Hot List stored. If you select Team, choose a team from the drop-down list.
6. Click **OK**.
7. Click **OK**. The Hot List is created but cannot be opened until you add calls to it.
8. Click **Close**.









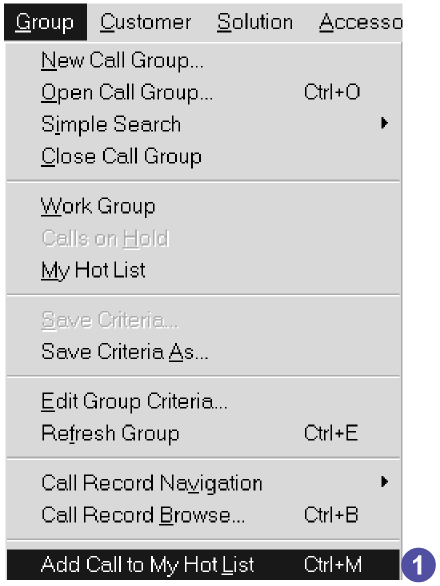
Adding Call Records to My Hot List

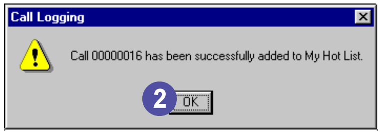
My Hot List is your personal group of calls. For example, you might want to create a "Top 5" issues list to use as a To Do list for the day.

Any number or type of calls can be added to My Hot List. Use these steps to add the currently displayed call to My Hot List.

Add a Call Record to My Hot List

1. Select **Add Call to My Hot List** from the **Group** menu.
2. Click **OK**.



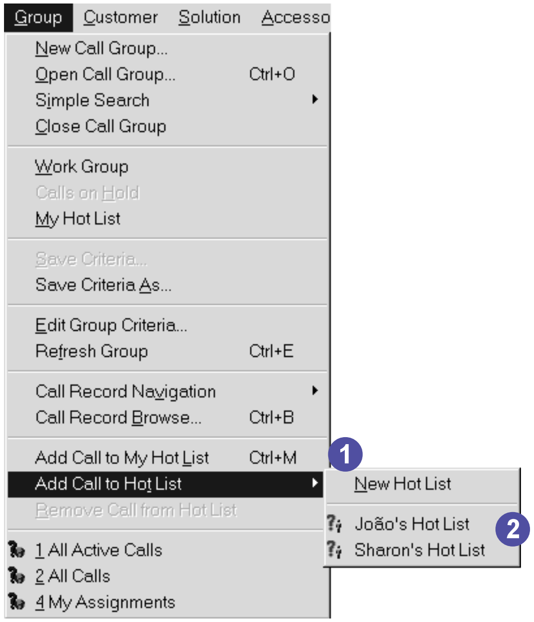


Adding Call Records to Other Hot Lists

You can add the currently displayed Call Record to any Hot List you can access.

Add a Call Record to Another Hot List

1. Select **Add Call to Hot List** from the **Group** menu.
2. Select a **hot list**.
3. Click **OK**.



Opening My Hot List

My Hot List is for your use only. It is already set up on your system; all you need to do is add calls to it.

There are different ways to use My Hot List. You might want to use it as a To Do list. It can include all the calls you need to work on today. Or you could use My Hot List to include Call Records for a research project.

Open My Hot List

1. Select **My Hot List** from the **Group** menu. If no calls have been added yet, a message appears, stating **"0 call records found."**

Editing Hot Lists

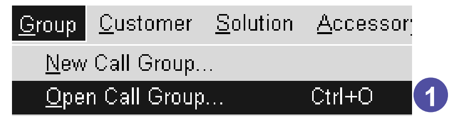
You can change the name, description or view location of a Hot List at any time. There are two ways to edit a Hot List: through the Open Call Group dialog box and through the Edit Group Criteria dialog box.

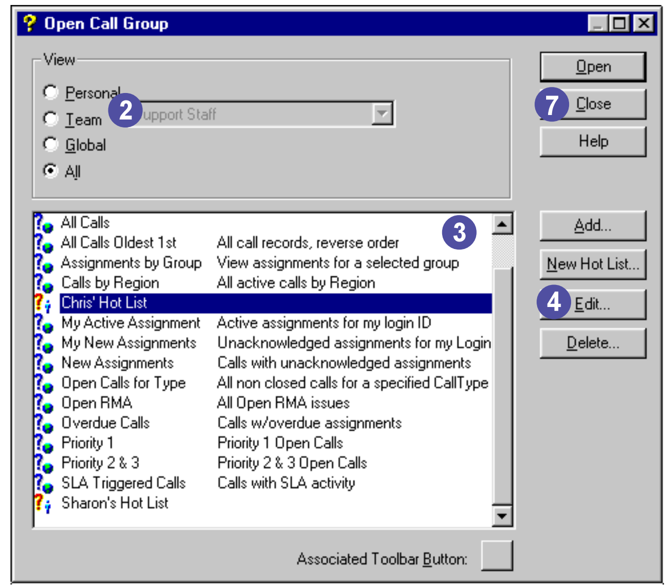
SEE ALSO

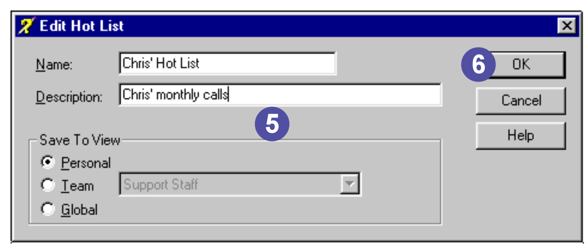
Editing a Call Group, in this chapter.

Edit a Hot List

1. Select **Open Call Group** from the **Group** menu.
2. Select the **view** where the Hot List is stored.
3. Select a **Hot List**.
4. Click **Edit**.
5. Edit the **name**, **description**, or **view location**.
6. Click **OK**.
7. Click **Close.**







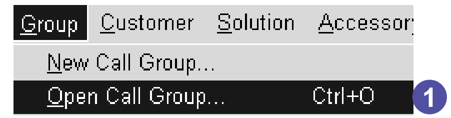
Deleting Hot Lists

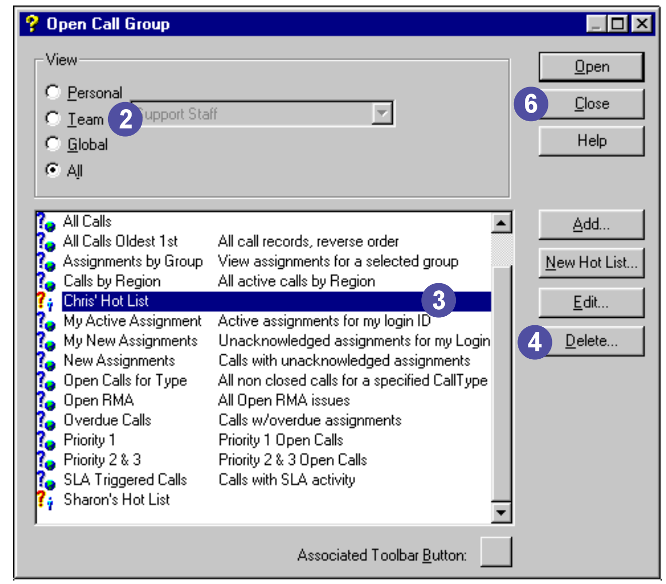
You can delete a Hot List. This procedure cannot be reversed. Your system administrator controls rights to delete Hot Lists.

You cannot delete My Hot List.

Delete a Hot List

1. Select **Open Call Group** from the **Group** menu.
2. Select the **view** containing the Hot List you want to delete.
3. Select a **Hot List** to delete.
4. Click **Delete**.
5. Click **Yes**.
6. Click **Close**.



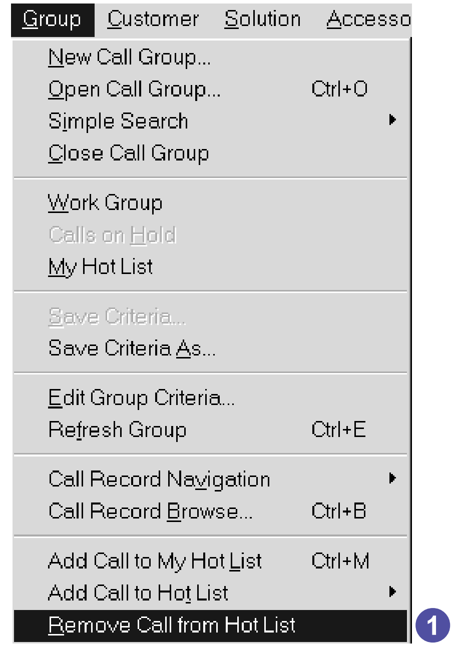


Removing Call Records from Hot Lists

You can remove the currently displayed Call Record from the open Hot List. You cannot undo a deletion. Your system administrator controls rights to remove records from Hot Lists.

Remove a Call Record from a Hot List

1. Select **Remove Call from Hot List** from the **Group** menu.



5

Finding Information

IN THIS CHAPTER

HEAT search engines help you find records that meet one or more criteria. With a Simple Search, you can quickly select predefined search criteria set up in your system by the system administrator. Simple Searches use only one search condition. You can also create a Boolean Search. Boolean Searches use search criteria defined by you, and can use multiple conditions and operators.

Finding All Call Records for a Customer

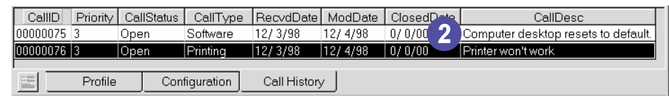
A Call History is a record of all calls for a single customer. You can quickly view the customer's calls by opening the Call History window.

TIP

You can access a caller's history by using the Caller History button on the toolbar.

Find All Call Records for the Current Customer or Employee

1. Select **Call History** from the **Customer** menu.
2. Double-click a **Call Record** to view it.

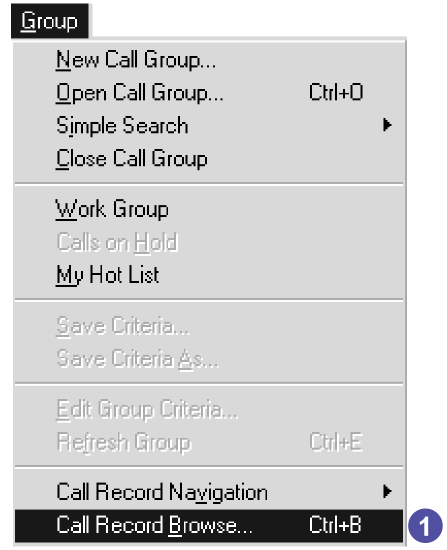


Browsing Call Records

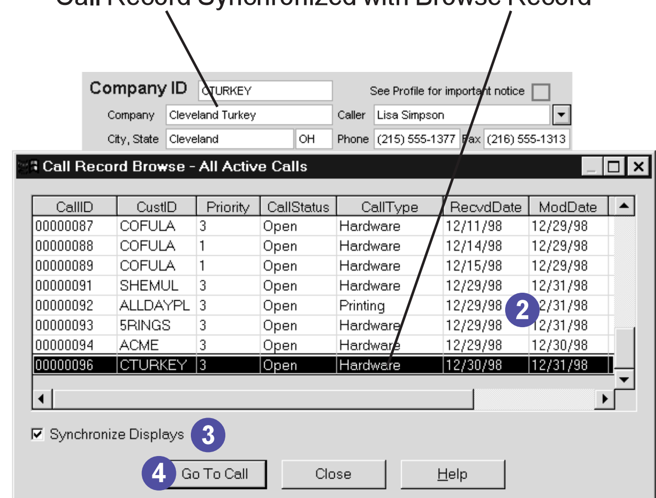
You can browse through a list of Call Records to locate a specific Call Record in a group.

Browse Call Records

1. Select **Call Record Browse** from the **Group** menu.
2. Browse through the list of Call Records.
3. Select **Synchronize Displays** if you want the Call Logging Screen to display the Call Record that is highlighted on the browser window.
4. To go to the highlighted Call Record, click **Go To Call**.



Call Record Synchronized with Browse Record

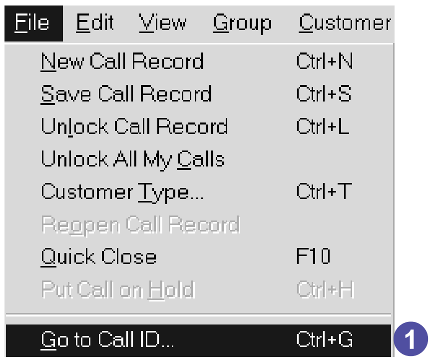


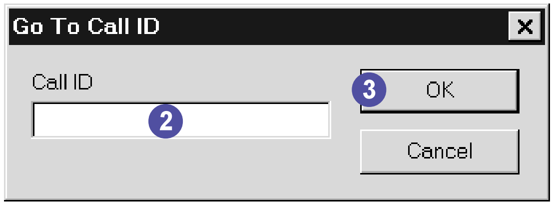
Finding Call Records by Call ID Number

You can retrieve any Call Record by its Call ID Number.

Find a Call Record

1. Select **Go to Call ID** from the **File** menu.
2. Type a **Call ID number.** Leading zeroes are not required.
3. Click **OK**. The Call Record appears in the Workgroup.





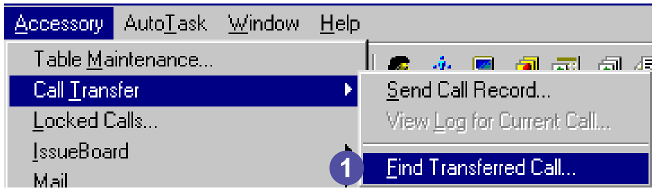
Finding Transferred Call Records

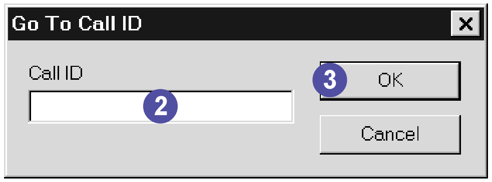
When another support center transfers a Call Record into your HEAT system, the Call Record gets a new Call ID. This puts it in sequence with your other Call Records.

If the transferred Call Record has an existing Call ID, that ID is recorded in the Call Transfer Log. Use this procedure to find the Call Record by its original Call ID.

Find a Transferred Call Record

1. Select **Call Transfer>> Find Transferred Call** from the **Accessory** menu.
2. Type the original **Call ID** in the **Call ID** field.
3. Click **OK**.





Viewing the Activity Log

An Activity Log contains activity information about a specific Call Record. Your system administrator determines whether the Activity Log is on or off.

You can use the Activity Log to provide information. For example, you can create a new Activity Log entry when the Stopwatch starts. It can display the name of the Tracker who opened the Call Record, the status of the Call Record during that time, and the amount of time that a person worked on it.

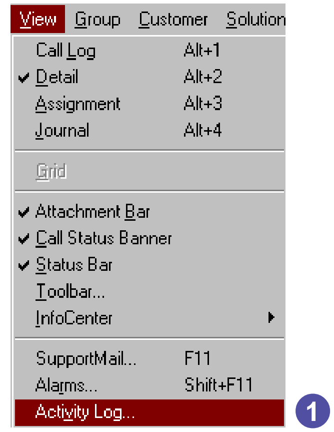
You can generate an activity log automatically, as well as type, modify, or delete Activity Log entries. The Total Duration field displays the combined time spent on all of the Call Record's activities.

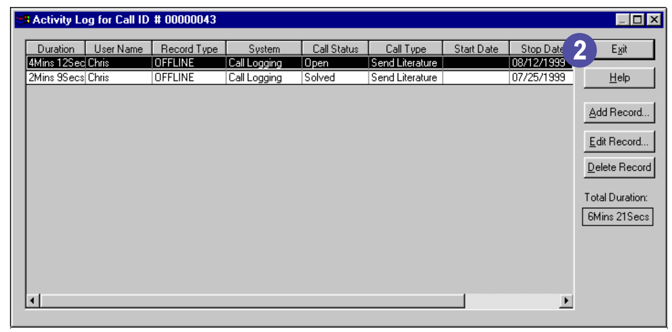
TIP

You can access a Call Record's Activity Log by using the Activity Log button located at the bottom of the Call Record Screen.

View an Activity Log

1. Select **Activity Log** from the **View** menu.
2. Click **Exit** to leave the window.





Adding Records to the Activity Log

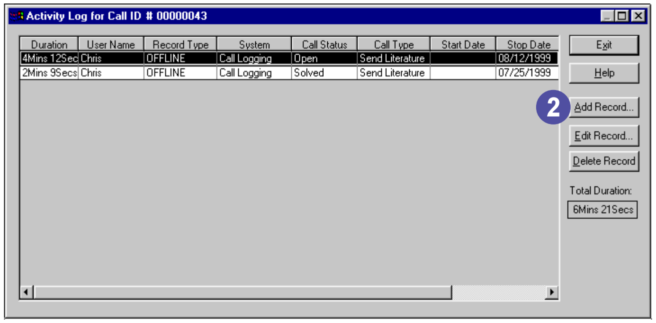
An Activity Log contains information about activity pertaining to a Call Record.

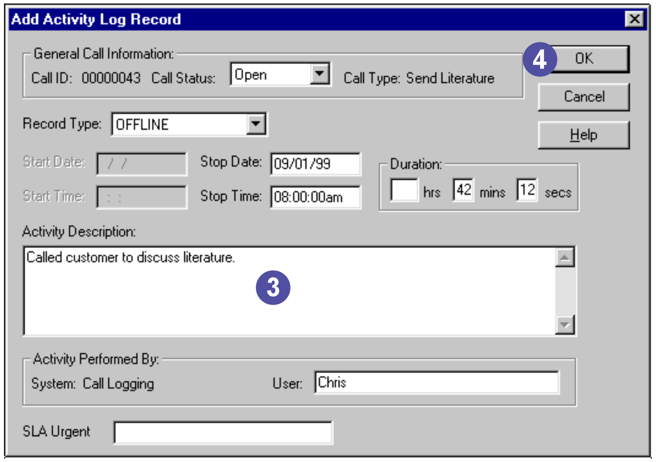
TIP

You can add, edit and delete records from the Activity Log only if you have security rights to perform those tasks.

Add a Record

1. Select **Activity Log** from the **View** menu.
2. Click **Add Record**.
3. Type the appropriate information in the applicable fields.
4. Click **OK**. Your entry appears in the Activity Log.





Editing Records in the Activity Log

An Activity Log can be manually edited to add, change or delete information.

TIP

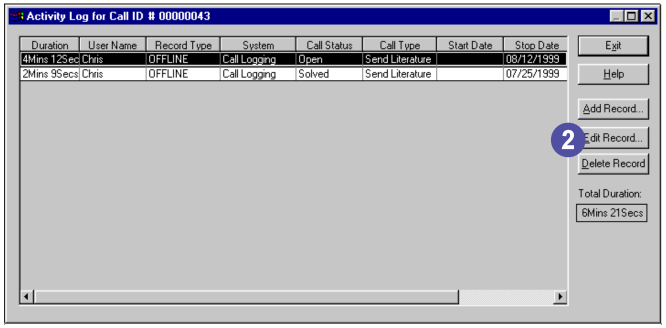
You can add, edit and delete records from the Activity Log only if you have security rights to perform those tasks.

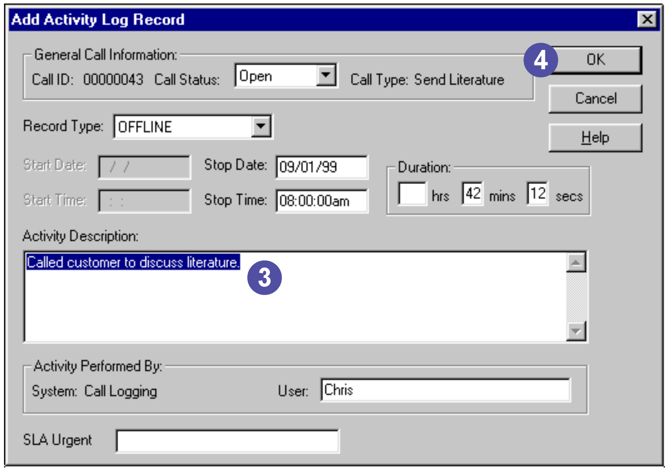
TIP

The Start Date and Start Time in the Activity Log cannot be edited.

Edit a Record

1. Select **Activity Log** from the **View** menu.
2. Highlight an entry in the Activity Log and click **Edit Record**.
3. Edit the **record** by typing new information in the appropriate fields.
4. Click **OK**. The changed entry appears in the Activity Log grid.





Deleting Records from the Activity Log

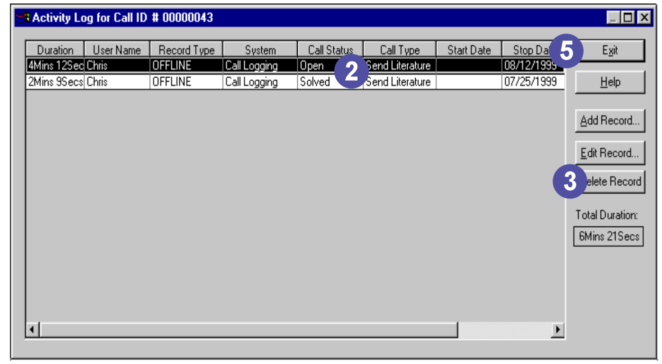
Information in an Activity Log can be deleted. You cannot, however, delete the entire Activity Log.

TIP

You can add, edit, and delete records from the Activity Log only if you have security rights to perform those tasks.

Delete a Record

1. Select **Activity Log** from the **View** menu.
2. Highlight an **Activity Log** entry.
3. Click **Delete Record**.
4. Click **Yes.**
5. Click **Exit**.



Finding Table Entries

Use Table Maintenance to browse through a grid view of selected data. This is a fast way to find a record for editing.

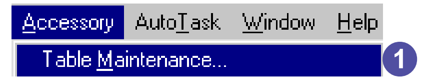
Your system administrator controls rights to modify tables.

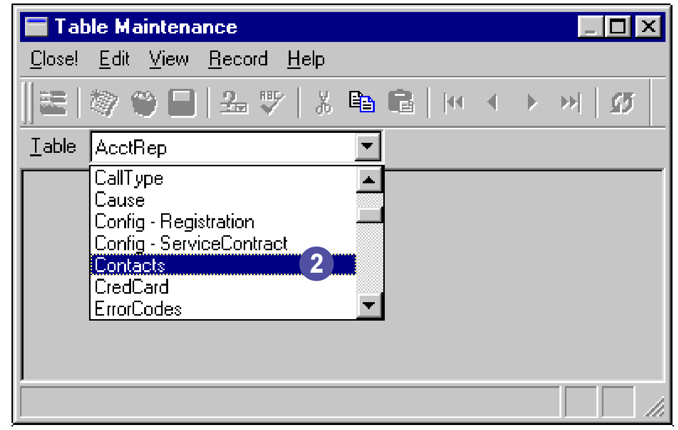
TRY THIS

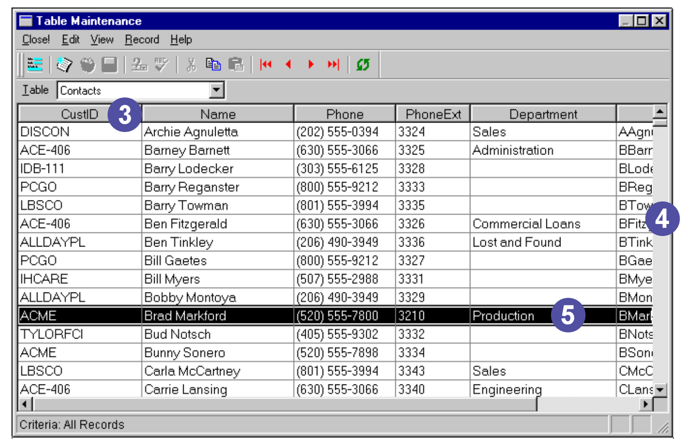
In any validation table click a column heading to sort the column in ascending order. Hold down Shift and click a column heading to sort the column in descending order.

Find a Table Entry

1. Select **Table Maintenance** from the **Accessory** menu.
2. Select a **table** from the **Table** drop-down box.
3. Click a **column heading** to sort the column in alphanumeric order.
4. Browse through the **table** to find the entry you want.
5. Double-click the **table entry**. The selected form appears.







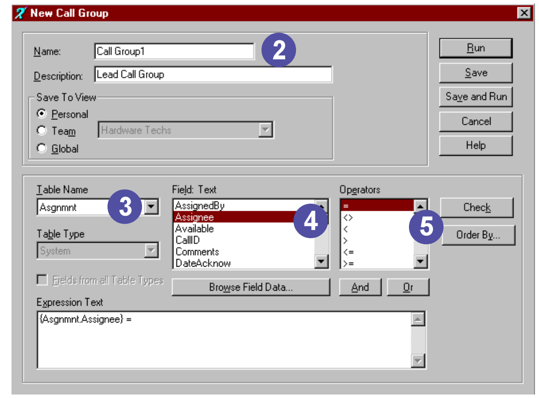
Adding a Validated Prompt

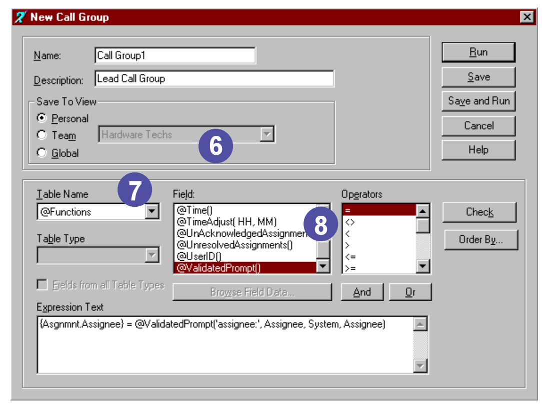
Some HEAT fields only accept entries that appear in a linked Validation table. You can use the Add Validated Prompt feature to access drop-down lists of validated information.

You can use this feature when you set up new Call Groups or AutoTasks.

Add a Validated Prompt in a Call Group

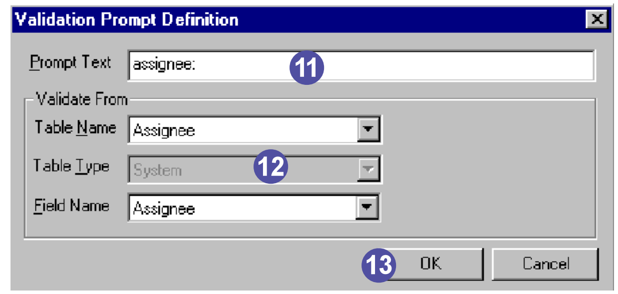
1. Select **New Call Group** from the **Group** menu.
2. Type the **name** of the Call Group and the description.
3. Select the **name** of the table.
4. Double-click the **name** of the field.
5. Double-click the **operator**.
6. Complete the **formula** in the Expression Text area by using the Table Name and Field Text lists a second time.
7. Select **@functions** from the Table Name drop-down list.
8. Double-click **@validated prompt in Field.**
9. Go to next page.

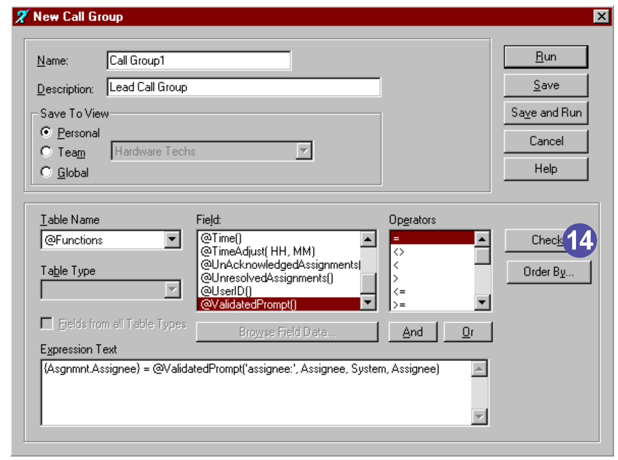


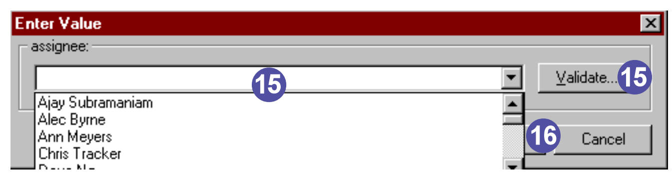


Add Validated Prompt

11. Type the name of the field followed by a colon.
12. Select the correct table and field name.
13. Select **OK**.
14. Click the **Check** button.
15. Select the validated information from the drop down list or click the **Validate** button for a more complete list.
16. Select **OK**.







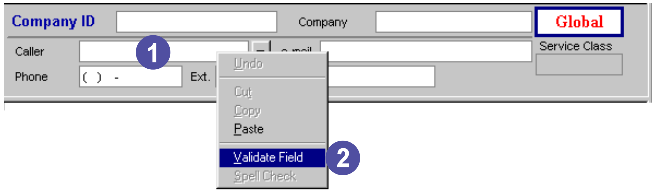
Quick Searching Validated Fields

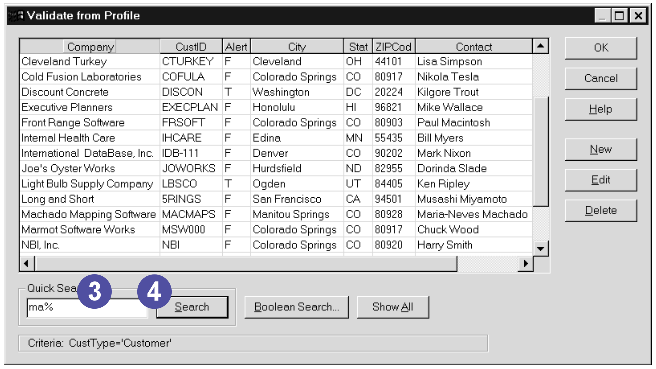
A Quick Search finds validated records that begin with the same letter or number, or have the same letter-number combination. A Quick Search only searches the first column in the Validation window.

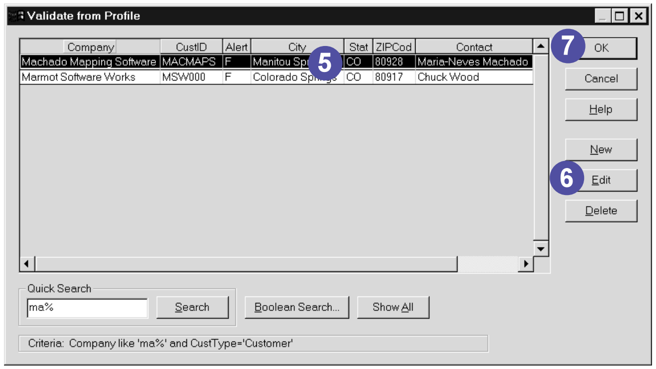
The percent character % is a wildcard. A search for ja% will find Janice, Jake, and Jalille. A search for %ka% will find Karen, Ekatarina, and Malka.

Quick Search a Validated Field

1. Right-click any field in a validation table. The field you click becomes the first column in the Validation window. This example uses the **Company** field.
2. Select **Validate Field**.
3. Type one or more characters of the word you want to find. The characters appear in the **Quick Search** field.
4. Click **Search**.
5. Select the **record** you want.
6. To edit the record, click **Edit**.
7. To populate the currently displayed Call record with this information, Click **OK**.







TRY THIS

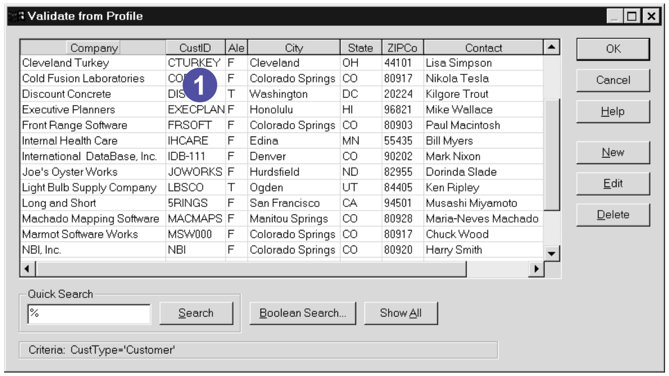
To narrow a search to a state, select the "State" field and search for the state. To narrow a search to a city, select the "City" field and search for the city.

TRY THIS

In any Validation window, click a column heading to sort the column in ascending order. Hold down Shift and click a column heading to sort the column in descending order.

Select Another Field to Search

1. Hold down **CTRL** and click the heading of the field you want to search. The **Quick Search** dialog box appears. The examples on the next two pages show how to Quick Search other fields.

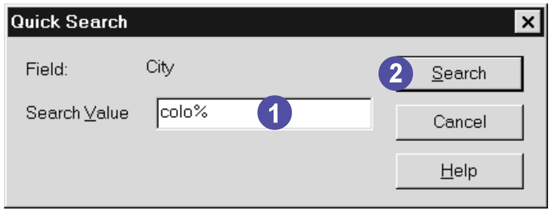


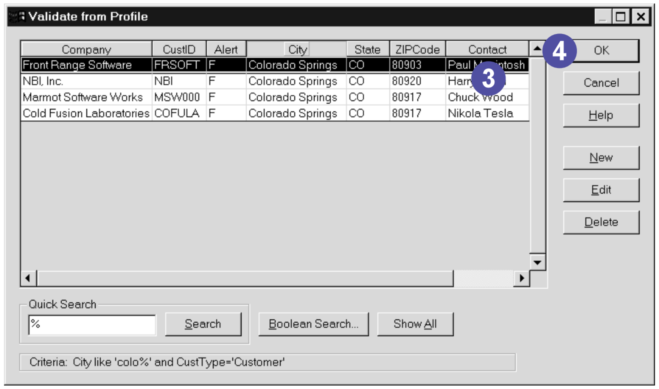
TIP

The percent character % is a wildcard. A search for **la%** *will find* ***Landon, Lars****, and* ***Laurianne****.*

Quick Search for Words Beginning with the Same Characters

1. Type the **first letter or letters of the word** you want to find. Be sure the **%** is the last character. This example searches the City field for cities beginning with the letters **colo**.
2. Click **Search**.
3. Double-click a Record to view it.
4. Click **OK** to populate the currently displayed Call Record with validated data.





TIP

*The percent character (%) is a wildcard. A search for **%ig%** will find **Ignacio, Luigi**, and **Solveig**.*

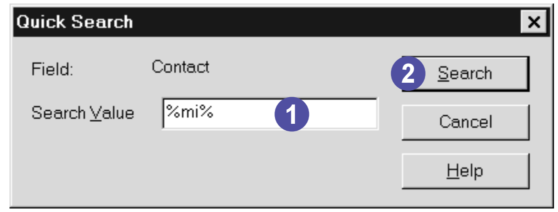
Quick Search for a Combination of Characters Anywhere in a Word

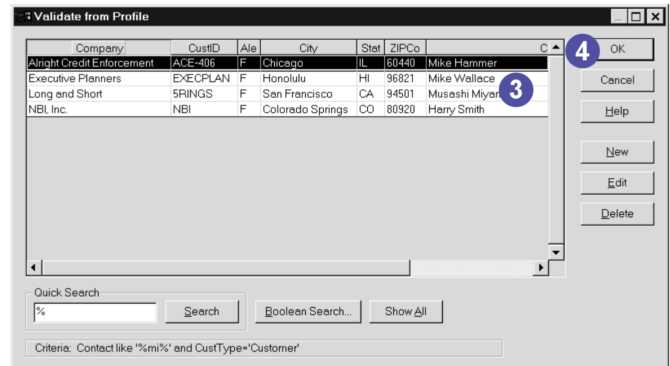
1. Type the **characters** in the word you want to find. Type a % before and after the letters. This example searches the **Contact** field for contacts with the letters **MI** anywhere in their names.

2. Click **Search.**

3. Double-click a **Record** to view it.

4. Click **OK** to populate the currently displayed Call Record with validated data.





Finding Records with a Simple Search

A Simple Search searches for all Call Records with a common feature, such as a Company or a Tracker. Your system administrator creates the list of Simple Searches, from which you can make your selection.

The Simple Search dialog box works the same way for all search fields.

TIP

An operator defines the logical relationship between a selected data field and its contents.

TIP

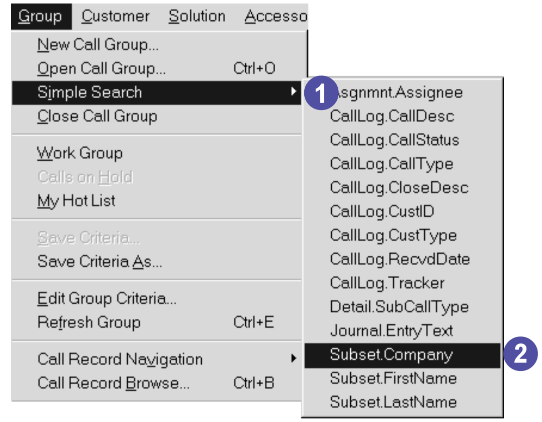
To perform a Simple Search on a field, right click on the field and select Simple Search.

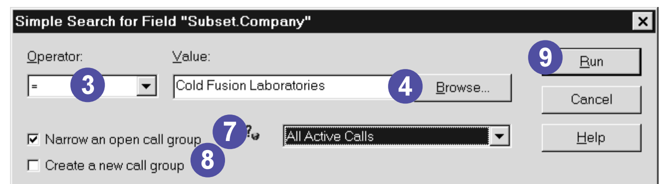
TIP

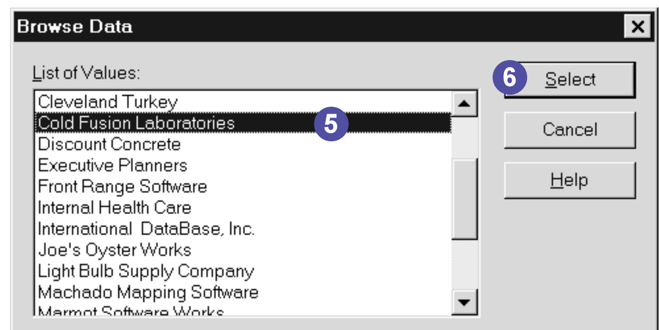
To expand a Simple Search to a Boolean search, click the browse button in the Simple Search dialog box and the Boolean button in the Validate from Profile dialog box.

Search for All Call Records with a Common Feature

1. Select **Simple Search** from the **Group** menu.
2. Select a **field** to search.
3. Select a **logical operator**.
4. Click **Browse**.
5. Select the **data** you want to locate.
6. Click **Select**.
7. To restrict the search to a single Call Group, click **Narrow an open call group** and then select a **Call Group** from the drop-down list. The search is confined to members of that Call Group.
8. To create a new Call Group to contain the Call Records, click **Create a new call group**. A new Call Group will be created that contains the Call Records found by this search.
9. Click **Run**.







Boolean Searches

What is a Boolean Search?

Searches are designed to locate information based on certain conditions (also called expressions). Simple Searches include only one expression. For example, you can run a Simple Search to find all the Open Call Records.

If you want to use other expressions to refine your searching criteria, you must use a Boolean Search. For example, let's assume that Chris Tracker wants to find all Open Call Records assigned to him. The search Chris defines has two conditions:

CallLog.CallStatus = 'Open' AND CallLog.Tracker = 'Chris'

This instructs HEAT to find all Call Records with a call status of "Open" *and* that have Chris listed as the tracker.

How the AND and OR Connectors Work

When defining a Boolean Search, you can use the AND and OR connectors, which join the conditions in your search criteria and instruct HEAT to find Call Records that contain ALL values or ANY of the values.

Using the AND Operator

When you connect two conditions with AND, HEAT looks for Call Records that contain both values you have specified. For example, you want to find all open Call Records that have **"hardware"** as the call type and **"DClark"** as the tracker. Your expression would look like this:

CallLog.CallStatus = 'Open' AND CallLog.CallType = 'Hardware' AND CallLog.Tracker = 'DClark'

Using the OR Operator

When you connect two conditions with OR, HEAT returns Call Records that contain **any** of the selected values. For example, you want to find any calls made about either Lotus 1-2-3 issues or MS Excel issues.

CallLog.CallType='Excel' OR CallLog.CalType='Lotus 123'

EXAMPLES

Using the >= Operator

Let's assume you want to find all the calls received this month. To do this, you want to locate all the calls that are greater or equal to a specific date. Your expression would look like this:

CallLog.RecvdDate >= '1998-11-01'

Note that the date must be manually entered into the Expression field and must follow the **YYYY-MM-DD** format.

Using the <> Operator

One of the more common types of Boolean Searches is to find all the Call Records that are not closed. The search results would include records that are open, pending, reopened, etc. Your expression would look like this:

CallLog.CallStatus <> 'Closed'

Using the *like* Operator

You can use the *like* operator to find text within a Call Record. Let's assume that you closed a Call Record several weeks ago but need to review it again. You can't remember the customer's name but can recall that the call description had the word "training" in it. You can use the like operator to find the Call Records that include "training" in the Call Description. Your expression would look like this:

{CallLog.CallDesc} like '%training%'

Note that the % is used as a wildcard. The % instructs HEAT to find all Call Records that have the word "training" anywhere in the Call Description.

Using the *is empty* Operator

Use the *is empty* operator to find empty fields. For example, you might want to find all Call Records with an empty **Priority** field. The expression you create would look like this:

CallLog.Priority is empty

Finding Records with a Boolean Search

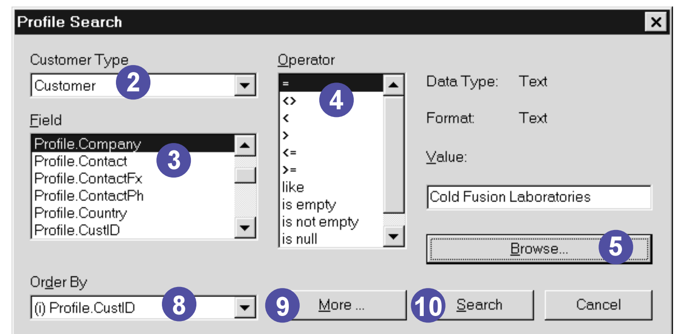
Use a Boolean Search to find customer records: Profile, Contact, Configuration, or Call History.

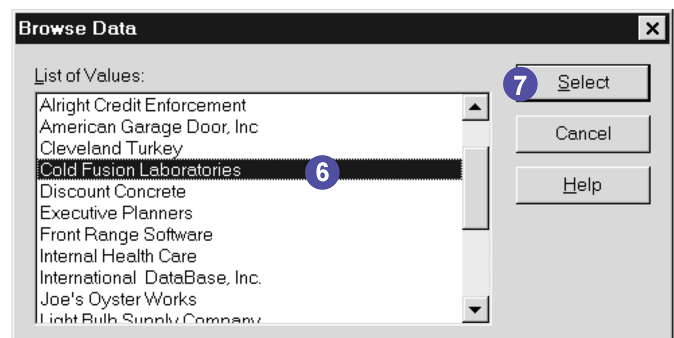
You can narrow the scope of a search with the logical operators AND and OR. If you put AND between two conditions, HEAT searches for records with both conditions. If you put OR between two conditions, HEAT searches for records with either condition or both.

The default sort order is Customer ID. This example shows a Boolean Search used to find a customer profile record.

Find a Customer Profile Record from Call Logging

1. Select **Search** from the **Customer** menu.
2. Select the **Customer Type**.
3. Select the **field** to search.
4. Select a **logical operator**.
5. Click **Browse**.
6. Select the **value** to search for.
7. Click **Select**.
8. Select the **sort order criterion.**
9. To modify the **scope** of this search, click **More** and go to the next page.
10. To search on these criteria, click **Search**.



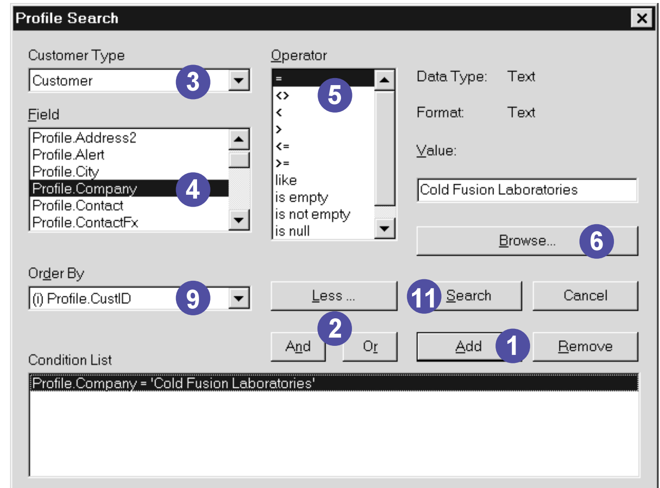


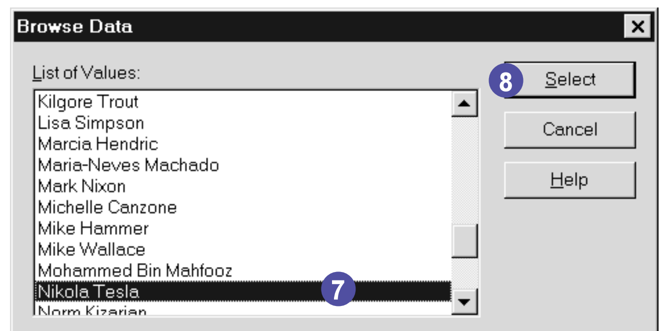
TIP

You can modify the scope of your search with the logical operators AND and OR.

Modify the Scope of Your Search

1. Click **Add**. The search criteria appear in the Condition List.
2. To search for both of two conditions, click **And**. To search for either of two conditions, or both, click **Or**.
3. Select the **customer type**.
4. Select the **field** to search.
5. Select a **logical operator**.
6. Click **Browse**.
7. Select the **value** to search for.
8. Click **Select**.
9. Select the **sort order criterion.**
10. Repeat steps1-9 as necessary.
11. Click **Search**.





Finding Profile, Contact, Configuration, and Call History Records

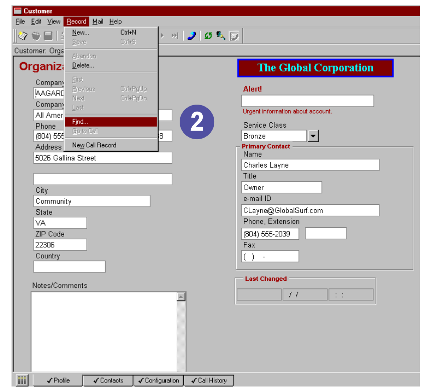
Use a Boolean Search to find customer records: Profile, Contact, Configuration, and Call History.

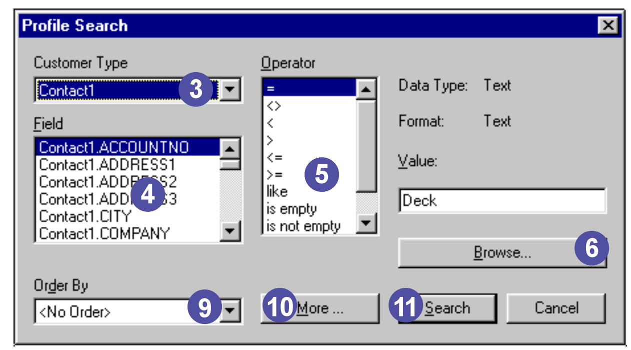
You can narrow the scope of a search with the logical operators AND and OR. If you put AND between two conditions, HEAT searches for records with both conditions. If you put OR between two conditions, HEAT searches for records with either condition or both.

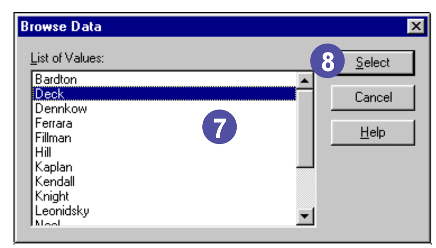
The default sort order is Customer ID. This example shows a Boolean Search used to find a customer profile record.

Find a Customer Profile Record from the Customer Window

1. Select **Profile** from the **Customer** menu.
2. Select **Find** from the **Record** Menu. The Find dialog box will appear.
3. Select the **customer type**.
4. Select the **field** to search.
5. Select a **logical operator.**
6. Click **Browse**.
7. Select the **value** to search for.
8. Click **Select**.
9. Select the **sort order criterion.**
10. To modify the scope of this search, click **More**.
11. To search on these criteria, click **Search**.







6

First Level Support

IN THIS CHAPTER

First Level Support (FLS) is a simple and powerful tool used for building knowledge bases. These knowledge bases, whether purchased or custom-built, provide answers to questions, solve problems, and share knowledge.

In First Level Support, knowledge is arranged in a tree format, like an outline. You can break each item of information, or node, of a knowledge tree into subtopics. These subtopics, called child nodes, can have children of their own, and so on. These parent-child relationships form the branches of a knowledge tree. You can quickly find answers in First Level Support by browsing through a knowledge tree's nodes with the keyboard or mouse or by searching for key words or phrases.

First Level Support lets you install, build, and use as many knowledge trees as your system resources allow. When you need to preserve important knowledge, you can quickly build your own knowledge trees or add to existing ones. You can attach external files such as word processing documents, spreadsheets, even video clips, to provide knowledge trees that are rich with information.

Accessing First Level Support

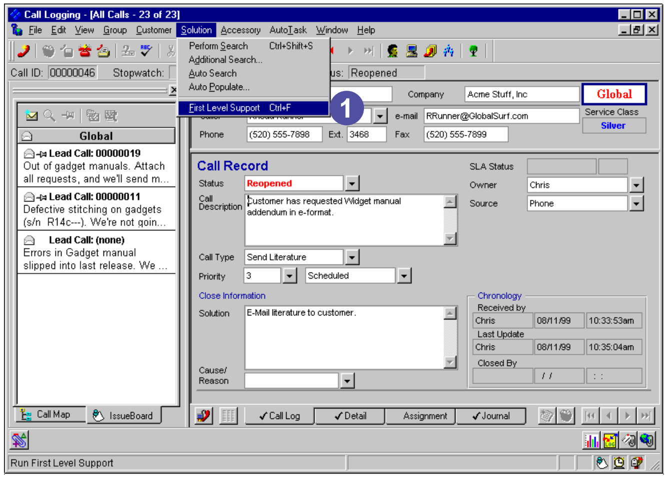
First Level Support is launched from Call Logging.

TIP

If the First Level Support Program Location dialog box appears in front of this window, the path from Call Logging to the First Level Support module has not been set up.

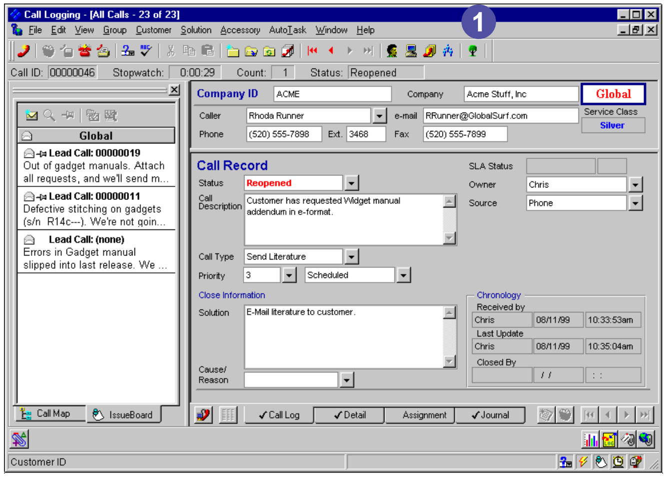
Access First Level Support from the Menu

1. Select **First Level Support** from the **Solution** menu.



Access First Level Support from the Toolbar

1. Click the **First Level Support** icon.

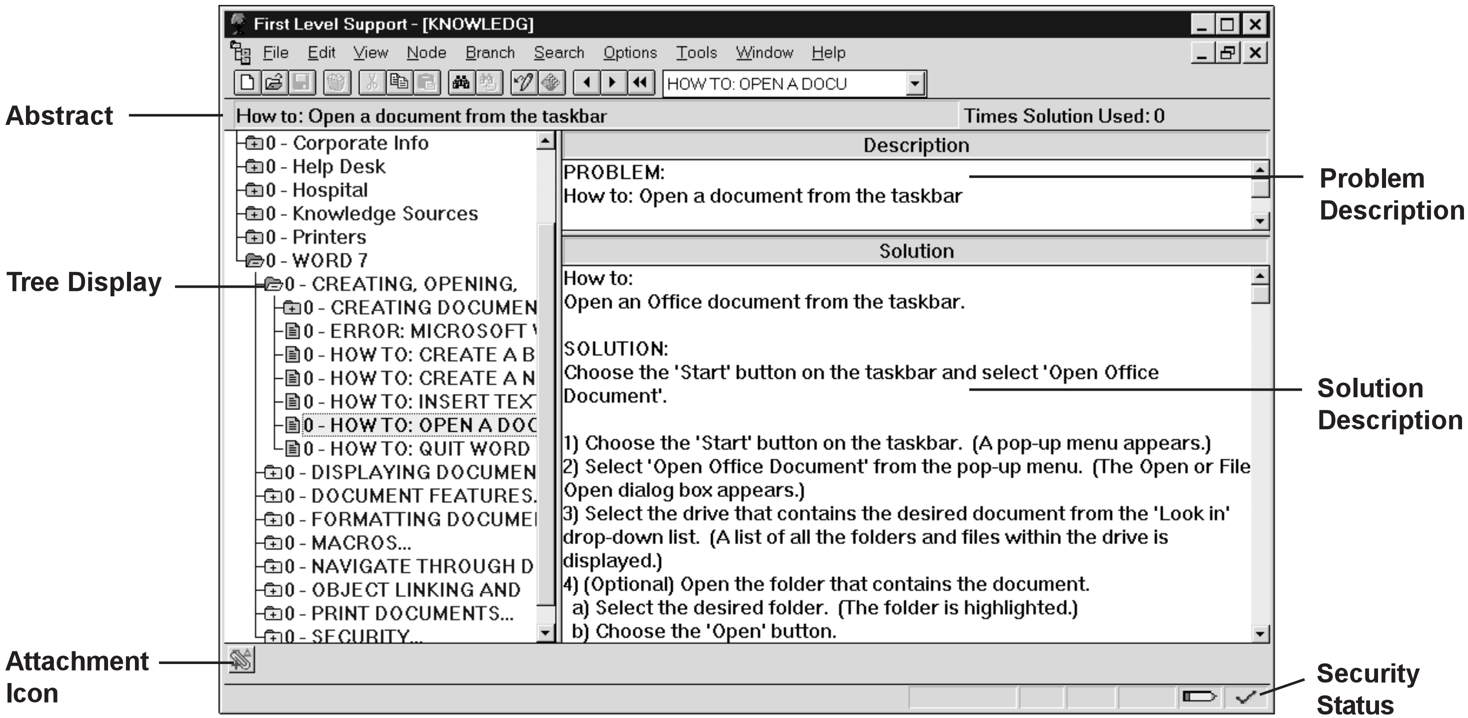


The First Level Support Window

First Level Support has a tree and branch structure. The main topic, First Level Support, is the tree. Each topic is called a "branch" or "node." Topics can branch out into more detailed information subtopics.

The First Level Support screen has four windows.

- The **Tree Display** window is on the left side of the screen. Use it to navigate through your tree and display the nodes and branches.
- The **Problem** description is on the upper right-hand screen. It displays a detailed description of the problem.
- The **Solution** description is on the lower right-hand screen. It describes the solution to the displayed problem.
- An **Abstract** appears above the tree window. It describes the currently selected node.

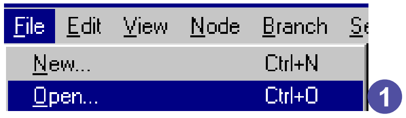


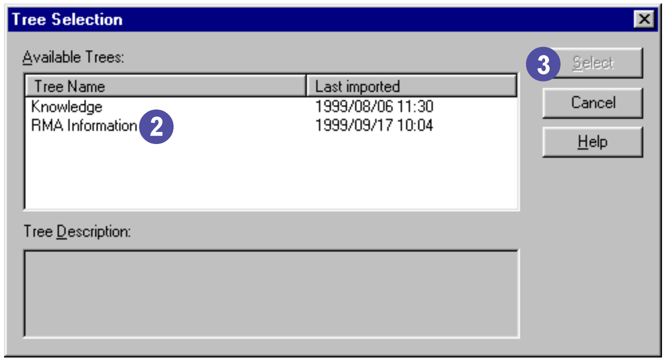
Opening Knowledge Trees

You can open a tree from the File menu in FLS.

Open a Tree

1. Select **Open** from the **File** menu in First Level Support.
2. Choose the appropriate **knowledge tree**.
3. Click **Select.**



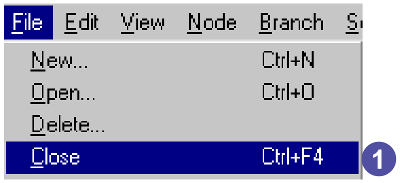


Closing Knowledge Trees

You can have several knowledge trees open at the same time. Closing a tree has no effect on other open trees.

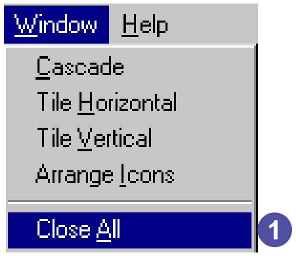
Close a Knowledge Tree

1. Select **Close** from the **File** menu.



Close All Knowledge Trees

1. Select **Close All** from the **Window** menu.



Importing and Exporting Knowledge Trees

You can import knowledge trees created by colleagues in your organization. You can also purchase knowledge trees from GoldMine or third-party developers, giving you instant access to specialized knowledge.

If you've created a tree, it's also easy to export. You can then distribute the tree to your coworkers.

There are two ways to export knowledge trees:

- **Distribution files (*.DST)** contain a copy of the knowledge tree, plus all attached files (if you choose), in a compressed format. Use Distribution files to recreate a complete knowledge tree at a different location.

  A Distribution file assumes that the new knowledge tree will not have access to the original attachment files. If you choose to include attachments, a Distribution file includes copies of the actual files.

- **Generic files (*.DAT)** are specially formatted ASCII text files that contain all of the tree's information, plus instructions for recreating its structure.

  A Generic file is a bridge between First Level Support and other applications. A Generic file is an uncompressed ASCII text file. You can edit one in any word processor, or create one with a good database application.

  Unlike a Distribution file, a Generic file assumes that it has not left home. If you choose to include attachment information, a Generic file records the DOS path and file name of attached files but does not contain copies of the files themselves. If you use a Generic file to recreate a knowledge tree at a different site, you must also send copies of all attached files.

Importing a Distribution file

When you import a Distribution file, First Level Support decompresses the file to create a knowledge tree in the database. If the distribution file includes attachments, you will be asked to choose a directory for those attachments.

Since a tree's original attachment files may have been drawn from many locations on a network, attachment files are renamed to prevent conflicts. The new file names include "FLS" plus a sequence number, and retain their original extensions. For example:

FLS0001.PCX
FLS0002.TXT
FLS0003.AVI

You can replace an existing knowledge tree by importing a Distribution file over it. You will typically do this when installing updated copies of commercial knowledge trees. If the Distribution file includes copies of attachment files, you will need to decide what to do with the original attachment files. For example, let's assume you once used a Distribution file to import a knowledge tree with attachments into the directory **C:\TREES\ASPEN** .

When you begin to import the updated version of **ASPEN**, First Level Support sees that **C:\TREES\ASPEN** already contains attachment files. At that point, it displays the **Tree Import** dialog box, asking you to decide what to do with the files.

Importing a Generic file

When you import a Generic file, First Level Support interprets the file to create a knowledge tree in the destination subdirectory.

A Generic file assumes that it won't leave its original location, so attachment files are not copied. Instead, the path and file name of each attachment is stored in the **.DAT** file.

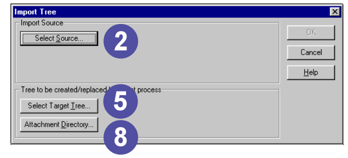
Since a Generic file is an ASCII file that you can create or edit in a text processor or database, First Level Support inspects each Generic file before importing it. The results of this inspection appear in the **Import Statistics** dialog box.

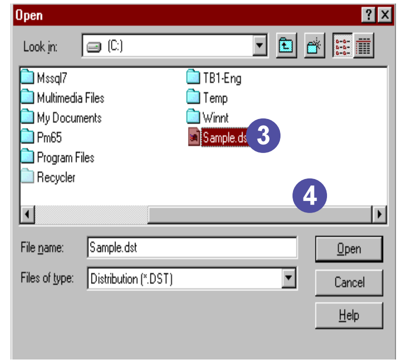
Importing Knowledge Trees

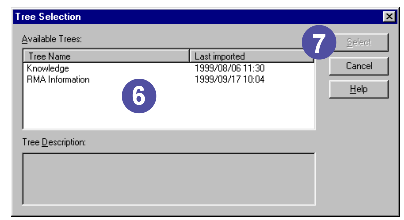
At times, you may want to use knowledge trees created by other parties. You can easily import distribution files (***.DST**) or generic files (***.DAT**) into First Level Support.

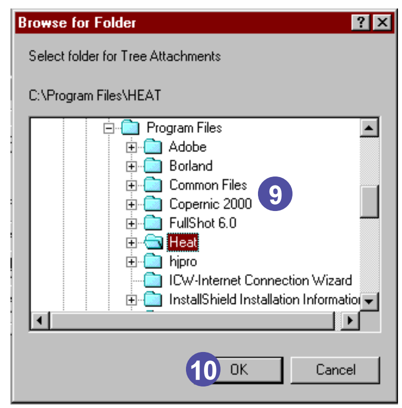
Import a Tree

1. Select **Import** from the **File** menu.
2. Click **Select Source**.
3. Select the **file** you want to import. You may need to navigate to the file.
4. Click **Open**.
5. Click **Select Target Tree.** The **Tree Selection** dialog appears.
6. Choose the **tree** into which you want to import the information or click **New Tree** to import the information in a new knowledge tree.
7. Click **Select**.
8. Click **Attachment Directory**.
9. Navigate to the **folder** where attachments for this tree are to be stored.
10. Click **OK.**









Exporting Knowledge Trees

You can export the currently selected branch or an entire tree from First Level Support. Files exported must be a distribution file (***.DST**) or a generic file (***.DAT**).

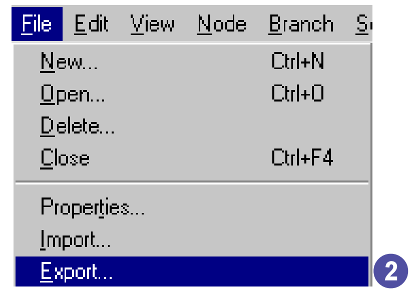
TIP

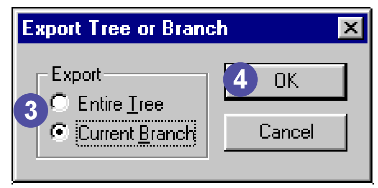
You must have edit or administrator privileges before you can export a tree.

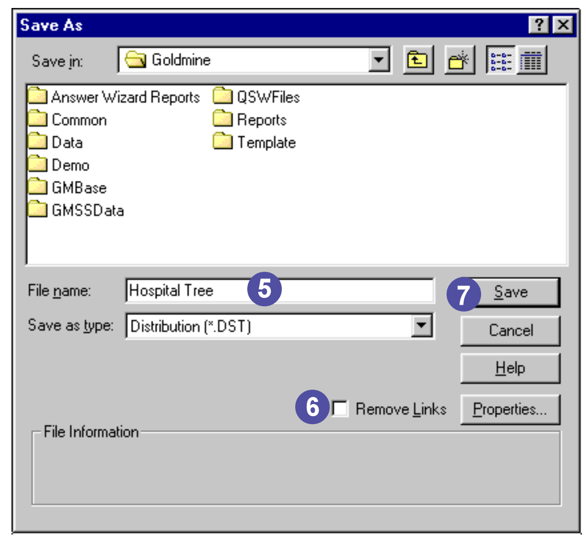
Options>>Editing Allowed *or Administrator Options must be enabled.*

Export a Tree

1. Select a **node** or **tree** from First Level Support.
2. Select **Export** from the **File** menu.
3. Select the **export type**. You can export a tree or the currently selected branch.
4. Click **OK**.
5. Type a **filename** in the **File name** field, then navigate to the location where you want the tree saved.
6. Check **Remove Links** if you want to remove any attachment references. Clear the box if you want to retain attachment references.
7. Click **Save**.







Setting Knowledge Tree Properties

By setting properties, you can include identifying information in a knowledge tree, define text area captions, store a user limit to control access, or add password protection. You may set or change the properties of any knowledge tree that you can edit.

TIP

If the Administrator Options item is disabled in the Options menu, the Properties are read-only.

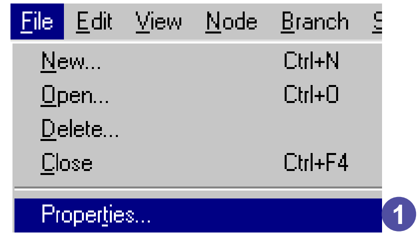
SEE ALSO

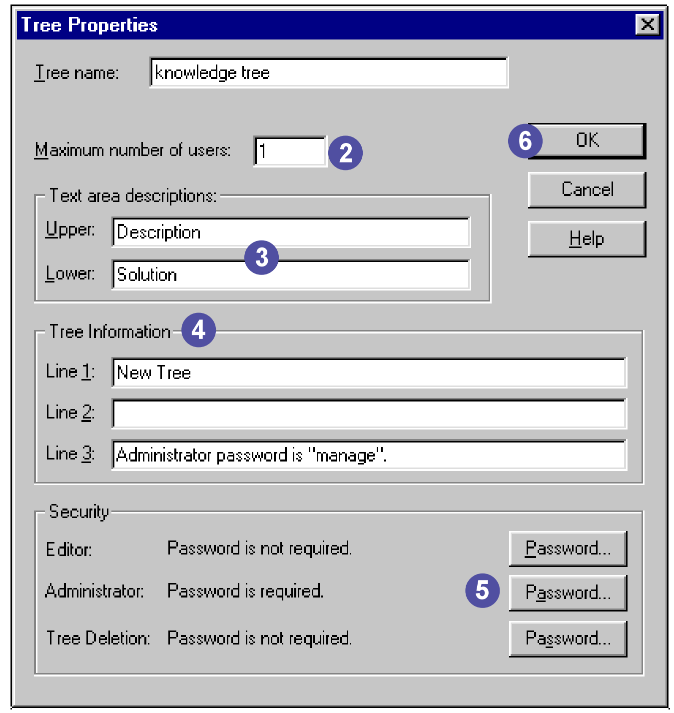
See also Setting Passwords, in this chapter.

Define the First Level Support Path

1. Select **Properties** from the **File** menu.
2. Type the maximum number of users with simultaneous access to this tree. A zero grants unlimited access.
3. Type names for the upper text area and lower text area in the **Text** area descriptions box.
4. Type a description for the current knowledge tree or record copyright information in the **Tree Information** box.
5. Click **Password** to set up a password for the **Administrator** (*see next page)*.

   Note: The **Administrator** password must be set before the **Editor** or **Tree Deletion** password can be set.
6. Click **OK**.





Setting Passwords

You can set three passwords to prevent unauthorized editing of a knowledge tree.

Setting the Editor password prevents a user from adding, editing or marking nodes for deletion. Setting the Tree Deletion password prevents users from deleting entire FLS trees.

These options are not available unless the Administrator password is set.

You must have the Administrator Options enabled to set a password.

TIP

Record your password in a safe place. If you forget your password, it cannot be recovered and you will not be able to edit your knowledge tree.

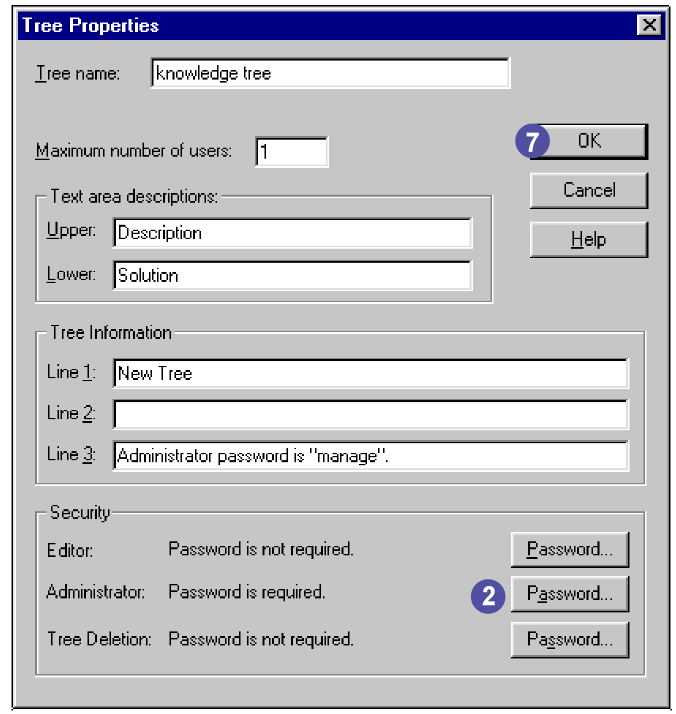
TIP

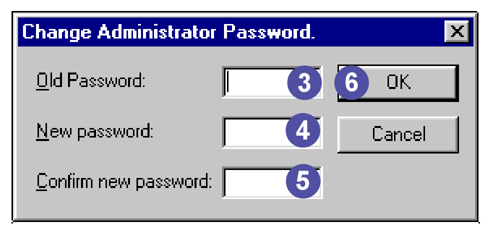
Passwords are case-sensitive.

Set a Password

1. Select **Properties** from the **File** menu.
2. Click **Password** for either the **Editor, Administrator or Tree Deletion**.

   Note: The **Administrator** password must be set before the **Editor** or **Tree Deletion** password can be set.
3. Type the current **password**.
4. Type the new **password**.
5. Type the new **password** again to verify it.
6. Click **OK**.
7. Click **OK**.



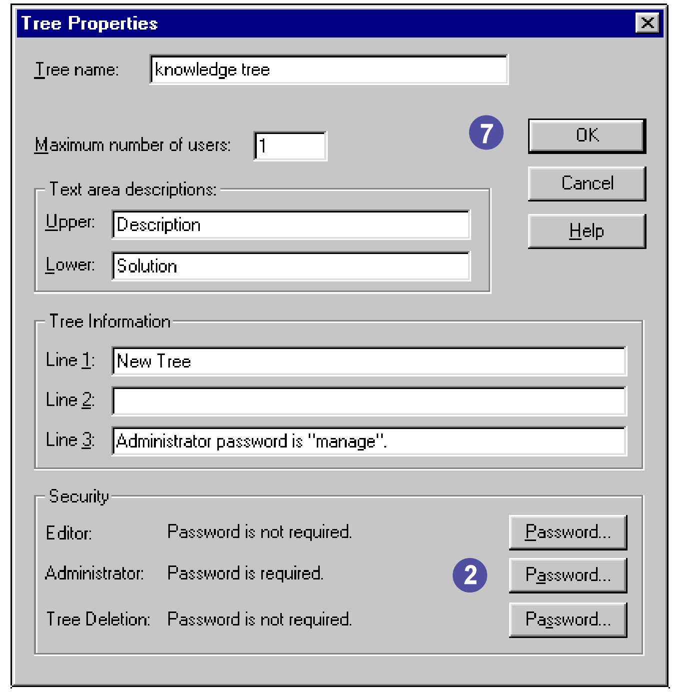


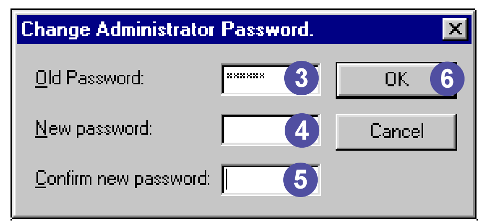
Removing Passwords

If you have already set a password and decide to allow access to all users, you can remove the password.

Remove a Password

1. Select **Properties** from the **File** menu.
2. Click **Password** for either the **Editor, Administrator or Tree Deletion**.
3. Type the current **password**.
4. Leave the **New Password** field blank.
5. Leave the **Confirm New Password** field blank.
6. Click **OK**.
7. Click **OK**.



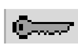


Changing User Status

In each knowledge tree, you can have one of three levels of editing rights. You can check your user status through the menu as described on the right, or by the icon represented in the First Level Support status bar.

To change your user status, you must have the appropriate security rights.

The icons represent the following:

 **Administrator**: Has full rights

 **Editing Allowed**: Can add and edit nodes, subject to the Administrator's approval. Can also mark nodes or branches for deletion subject to the Administrator's approval.

 **Viewing Only**: Has no editing or administrator rights.

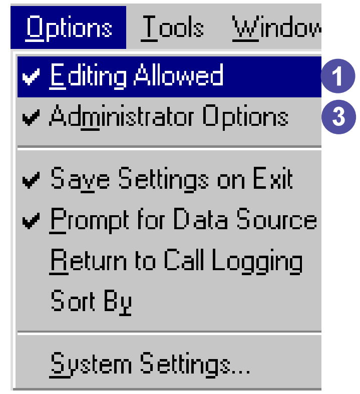
Change User Status

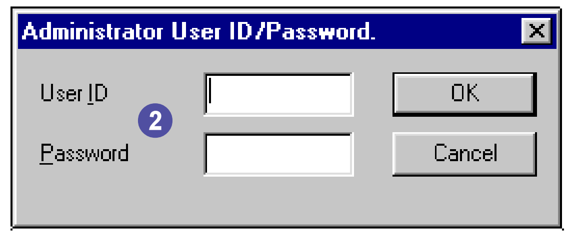
1. To allow edit rights, select **Editing Allowed** from the **Options** menu.

2. Type your **password** then click **OK**. A check mark indicates you have edit rights.

   Note: In order to use this option, a password must have already been set in the Tree Properties menu.

3. To get Administrator Rights, click **Administrator Options**, then type your password and click **OK**.





Adding Nodes

When you need to add more information to an existing tree, you can add a node to a knowledge tree. When you add a node, you are creating a child of the current node. The branch automatically expands to display the newly created node.

TIP

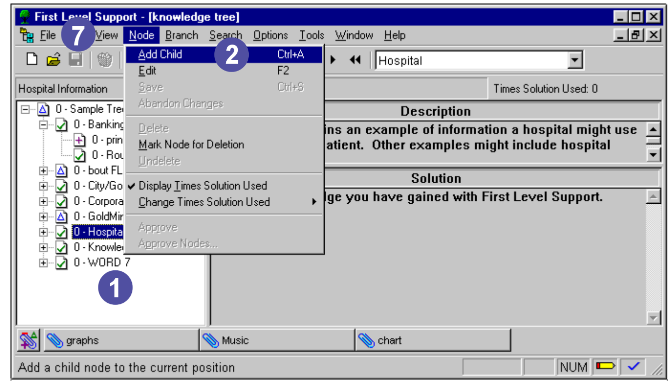
Before you can add nodes, you must have edit or Administrator rights. ***Options>>Editing Allowed*** *must be enabled in First Level Support.*

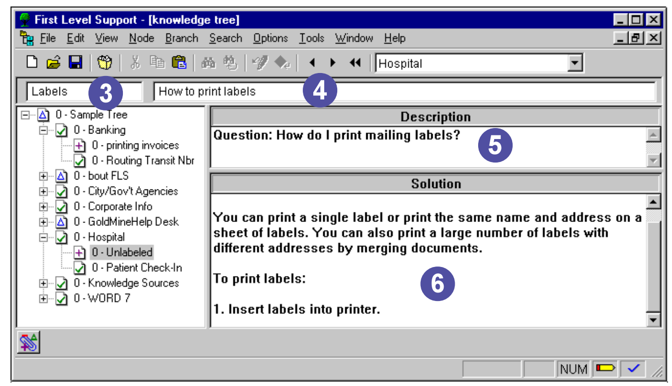
SEE ALSO

Adding Nodes Through the Search Results Dialog, in this chapter.

Add a Node

1. Highlight the node that will be the parent of the node you want to create.
2. Select **Add Child** from the **Node** menu. A new Dialog box appears.
3. Enter a **title** for the node's label.
4. Enter an **abstract** for the node.
5. Enter **text** for the **Description** window.
6. Enter **text** for the **Solution** window.
7. Click **Save**.





Editing Nodes

You can edit information in an existing knowledge tree at any time.

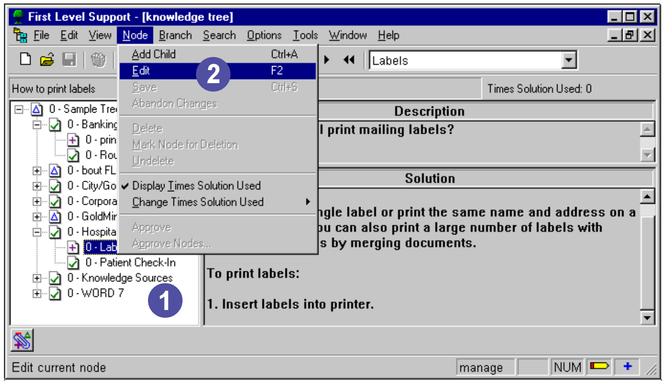
Your ability to edit First Level Support is based on your security rights.

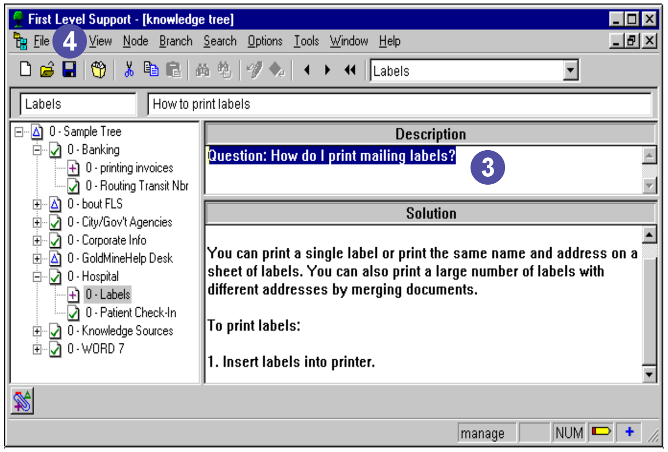
TIP

Before you can edit nodes, you must have edit or Administrator rights. ***Options>>Editing Allowed*** *or* ***Options>>Administrator Options*** *must be enabled in First Level Support.*

Edit a Node

1. Highlight the **node** that will be edited.
2. Select **Edit** from the **Node** menu.
3. Edit the **node**.
4. Click **Save**.





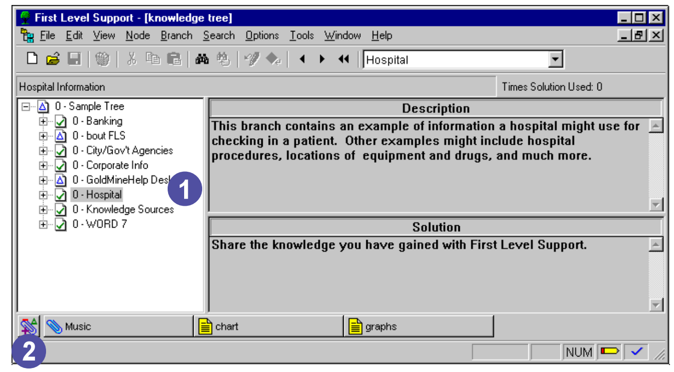
Adding and Viewing Attached Files

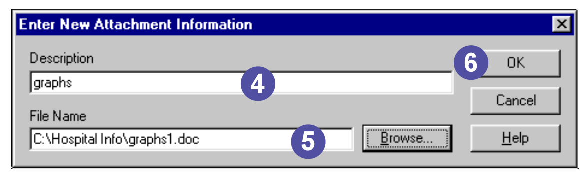
First Level Support provides a great deal of flexibility to document problem resolutions. You can attach files and documents to a node to further explain problem resolutions.

The Attachment bar displays files and applications attached to the current node. Attachments can be word processing documents, spreadsheets, graphics files, even video clips.

Add an Attachment

1. Highlight a node.
2. Click the **Attachment** icon in the **Attachment** bar.
3. Select **Add Attachment**.
4. Enter a **description** for the attachment.
5. Enter the attachment **location** or click **Browse** to navigate to it.
6. Click **OK**.





View an Attachment

1. Highlight a **node**.
2. Click an **attachment** in the **Attachment** bar.

Changing the Sort Order of Trees

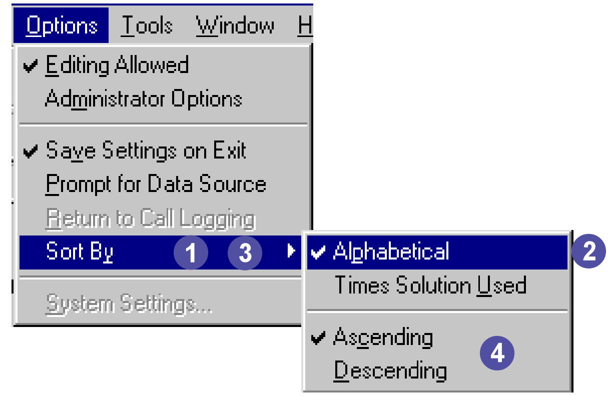
You can sort a tree's nodes alphabetically or by the number of times a solution has been used. You can then sort by Ascending (lowest to highest) or Descending order (highest to lowest).

TIP

Times Solution Used numbers are incremented when you post a solution back into a Call Record. If your help desk does not post solutions, zero appears for all nodes. You can also change this with ***Node>>Change Times Solution Used>>Increment****.*

Change the Sort Order of a Tree

1. Select **Sort By** from the **Options** menu.
2. Select **Alphabetical** to sort the tree alphabetically or select **Times Solution Used** to sort the tree by the number of times a solution has been used.
3. Select **Sort By** from the **Options** menu.
4. Select **Ascending** or **Descending**.



Noise Words

First Level Support ignores noise words while searching. FLS reads noise words if they appear within quote marks. The following is a list of noise words. You cannot add to or edit the noise word list.

a	about	after	all	along
also	an	another	any	are
aren’t	as	at	be	because
been	before	being	between	both
but	by	came	can	can’t
come	could	couldn’t	could’ve	did
didn’t	do	don’t	each	for
from	get	got	had	hadn’t
has	have	haven’t	he	her
here	herself	him	himself	his
how	I	if	in	into
is	isn’t	it	its	just
like	made	many	me	might
mightn’t	more	most	must	my
never	not	now	of	on
only	other	our	out	over
said	same	see	she	should
shouldn’t	should’ve	since	some	still
such	take	than	that	the
their	them	then	this	those
through	thus	to	too	under
up	usually	very	was	way
we	well	were	what	when
where	which	while	who	with
would	wouldn’t	would’ve	you	your

Searching Knowledge Trees

To perform a search, you must tell First Level Support to find certain words within nodes. First Level Support finds the nodes that contain some or all of those words. You can search within the current knowledge tree, or search several trees at once.

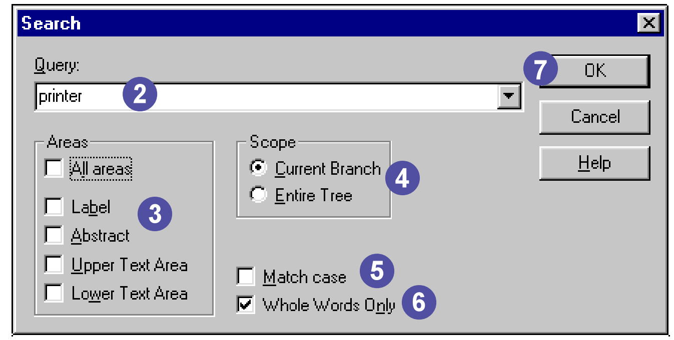
A search query can contain any number of words or phrases, up to a limit of 100 characters. You may use logical operators and quote marks to build simple and complex queries. To find nodes or paths that contain all the words in the query, connect words with AND. First Level Support assumes words are connected with OR unless you say otherwise. Place double quotes around strings of text to search for exact matches.

SEE ALSO

Adding Nodes Through the Search Results Dialog, in this chapter.

Search the Current Knowledge Tree

1. Select **Search Tree** from the **Search** menu.
2. Enter the **search query** in the **Query** box. To view previous queries, click the down arrow.
3. Select the **area to search**.
4. Click **Current Branch** or **Entire Tree** to set the range of the search.
5. Check **Match case** to perform a case-sensitive search.
6. Check **Whole Words Only** to search only for words that match.
7. Click **OK**.



Searching Multiple Trees

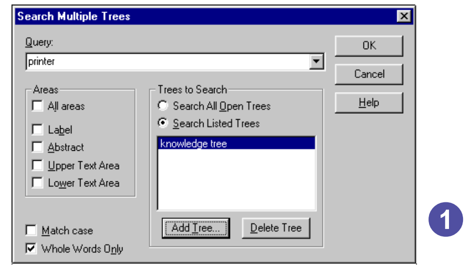
If you have more than one knowledge tree, you can search all your trees simultaneously.

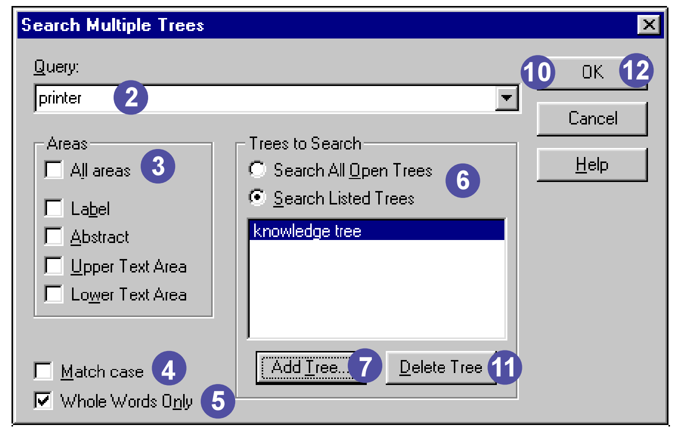
TIP

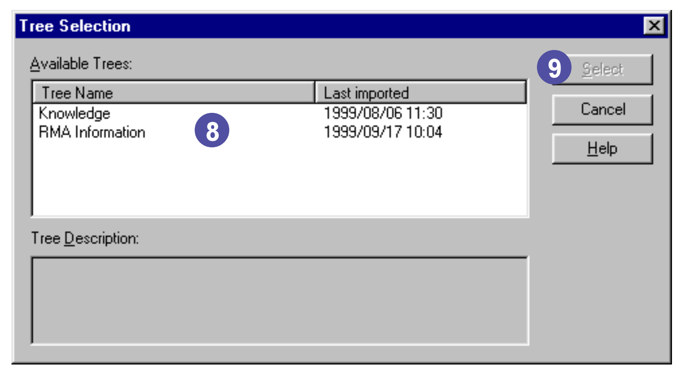
If you selected "Search Listed Trees," you can add one or more trees.

Search Multiple Trees

1. Select **Search Multiple Trees** from the **Search** menu.
2. Type the search query in the **Query** box.
3. Select the area to search.
4. Check **Match case** to perform a case-sensitive search.
5. Check **Whole Words Only** to search only for words that match.
6. Select either **Search All Open Trees** or **Search Listed Trees**.
7. If you select **Search Listed Trees**, click **Add Tree** to add a tree to the list.
8. Highlight a tree.
9. Click **Select**.
10. Click **OK** to begin a search.
11. To remove a tree from the list, highlight it and click **Delete Tree**.
12. Click **OK**.







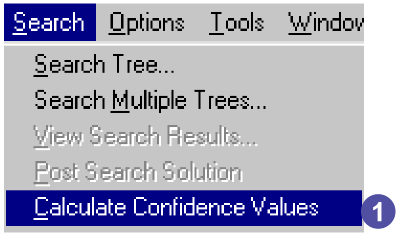
Using Confidence Values

Nodes can be sorted based on the percentage of search words found in each node. This percentage is called the Confidence Value.

For example, if you search for the words *Lotus* AND *files*, all nodes containing both *Lotus* and *files* receive a score of 100%. All nodes containing either *Lotus* or *files* receive a score of 50%. If you search for 3 words, you might see scores of 100%, 66% and 33%.

Set up Confidence Values

1. Select **Calculate Confidence Value** from the **Search** menu. A check mark appears next to the menu item.



Using Search Results

The Search Results dialog box displays the name and knowledge tree of each node that meets your search conditions. To see each node's complete path, select the Full Path Names option in the Display box.

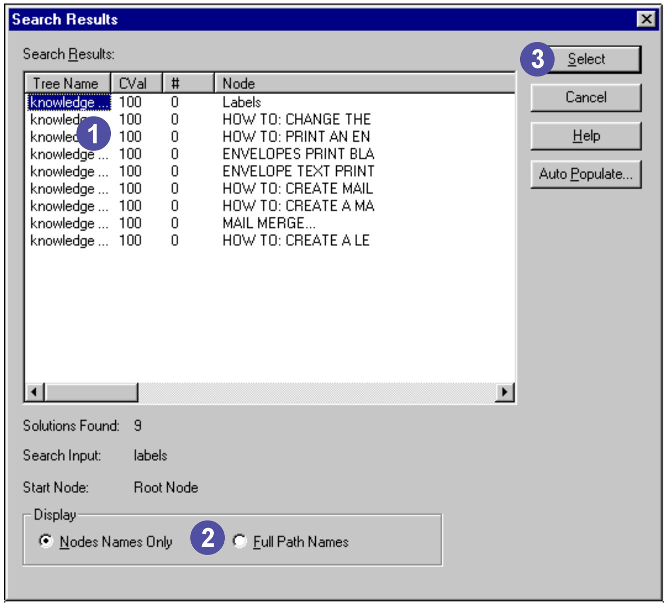
The lower left of the Search Results window displays your query as well as the starting node of the search.

TIP

You can sort the search results by clicking on the column headers.

View Search Results

1. After you have completed your search, select a **node name** from the **Search Results** window.
2. Select a **Display** type to see only the node names or the full path name.
3. Click **Select**. The node you select is highlighted in the Tree display.



Finding Text in Nodes

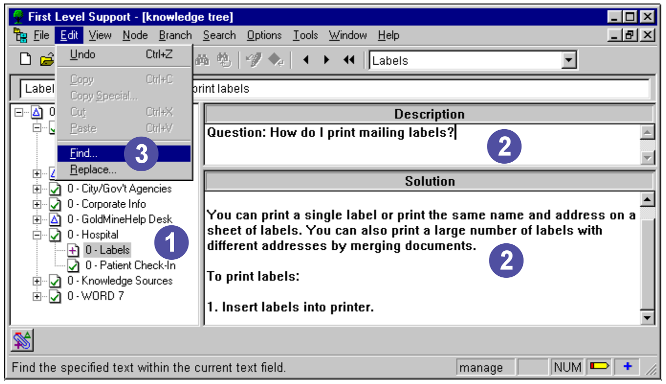
You can use the Find option to locate text in a node's upper text area or lower text area.

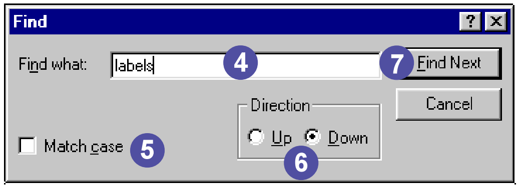
TIP

Highlight the first occurrence of the word or phrase before you select "Find"... or press F3. When the Find dialog box appears, the highlighted text is already in the "Find What" box.

Find Text in a Node

1. Highlight the **node**.
2. Click in either the upper or lower text area.
3. Select **Find** from the **Edit** menu.
4. In the **Find What** field, type the word or phrase you want to find.
5. Check **Match Case** to perform a case sensitive search.
6. Select the **direction** of the search, starting from the current cursor position. **Up** searches up to the root of the tree. **Down** searches down to the last node of the tree.
7. Click **Find Next**. The first occurrence of the text is highlighted in the text area.





Adding Nodes through the Search Results Dialog Box

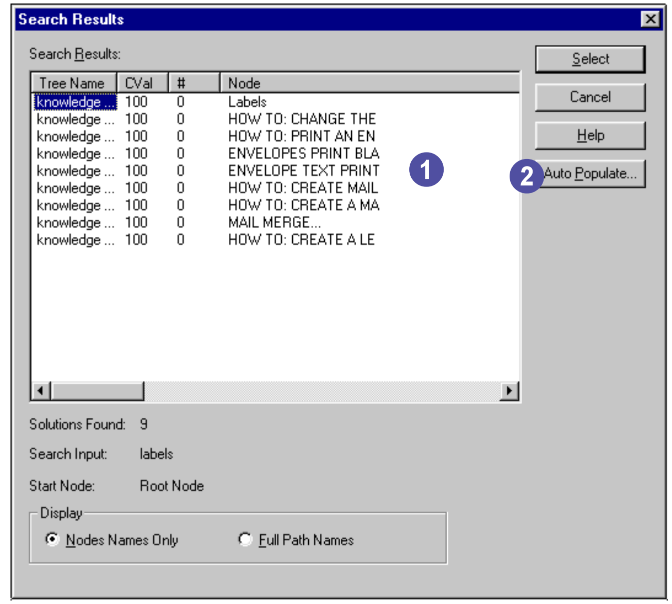
After running a search, you can quickly add new nodes by clicking the Auto Populate button.

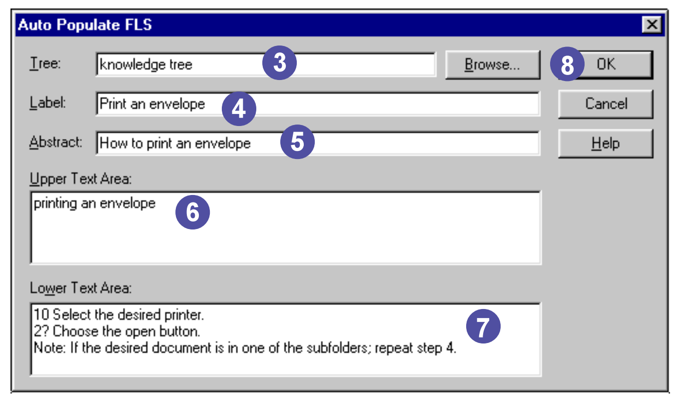
TIP

You must have edit or administrator privileges before you can add nodes.

Add a Node

1. In the **Search Results** dialog box, select a tree and node.
2. Click **Auto Populate**.
3. Enter a **name** for the tree if you want to add a node to a different tree. The current knowledge tree appears by default.
4. Enter a **label name**.
5. Enter an **abstract** for the new node.
6. Enter **text** for the upper text area. Your query words appear by default, but you can overwrite them. (Noise words will not appear in the default text.)
7. Enter **text** for the lower text area.
8. Click **OK**.





Posting Solutions to HEAT

If your help desk stores problem solutions in the lower text area, you can transfer this information to a designated memo field in the current Call Record.

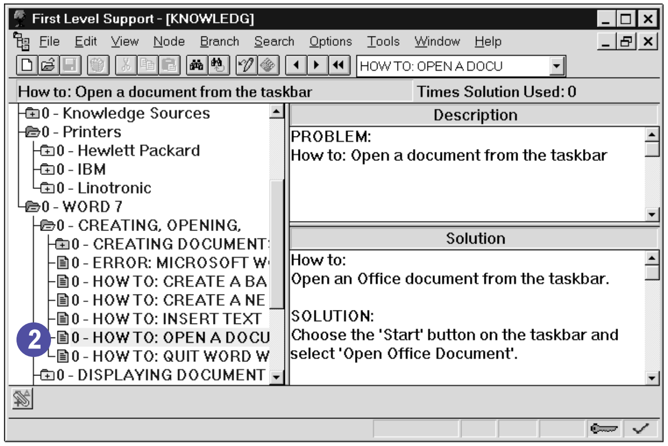
Before you can use this feature, the current Call Record in the Call Logging Module must be editable.

TIP

If an empty Work Group is in the foreground or if the current Call Record is closed or locked, First Level Support cannot transfer a solution.

Post Solution to a Call Record

1. Make sure that the Call Record is displayed in Call Logging.
2. In First Level Support, highlight the **node** that contains the solution.
3. Select the **Post Search Solution** from the **Search** menu. The text in the lower text area of the current node is sent to the memo field defined in the Administrator Module. The node's "number of times solution used" counter is incremented by 1.



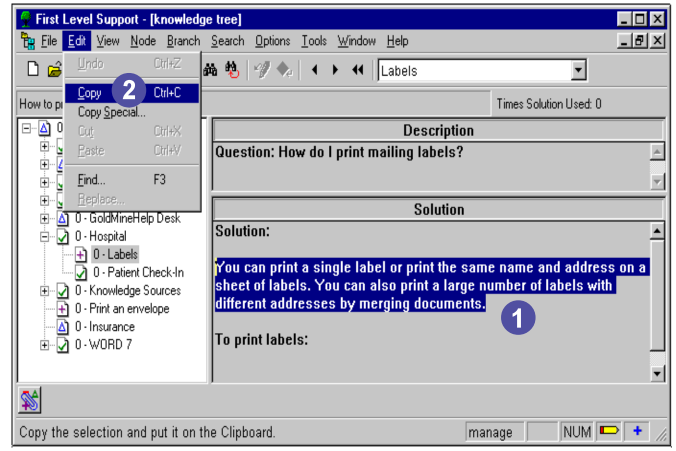
Copying Text

You can copy selected text in a knowledge tree or parts of a node or branch. The information can then be pasted into another application, such as a Call Logging journal or solution description.

Copy Text

1. Highlight the **text** you want to copy.

2. Select **Copy** from the **Edit** menu**.** Information is copied to the clipboard.



Copy Part of a Node or Branch

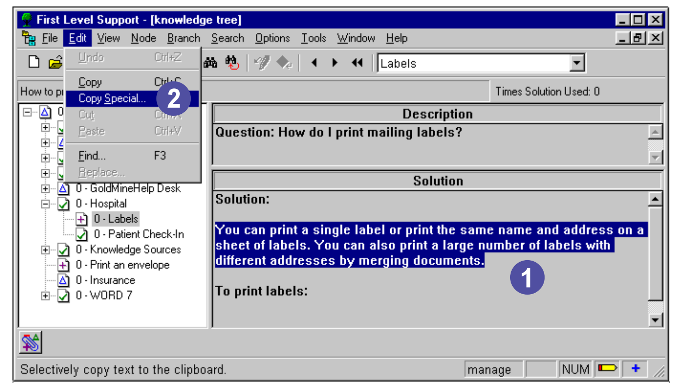
1. Highlight the **text** you want to copy.

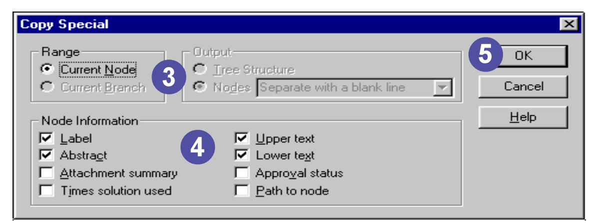
2. Select **Copy Special** from the **Edit** menu. The **Copy Special** dialog box appears.

3. Click **Current Node** or **Current Branch**.

4. Select the **parts of the node or branch** you want to copy.

5. Click **OK**. Information is copied to the clipboard.



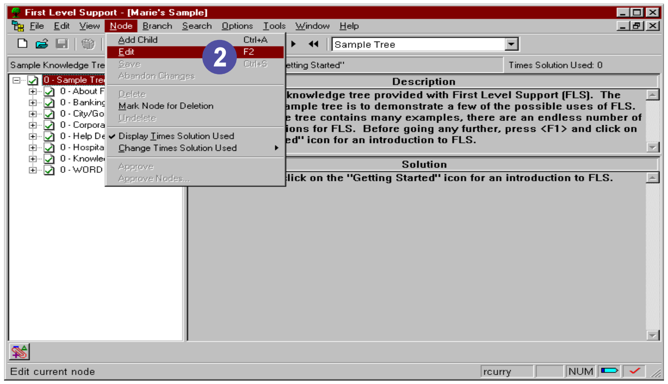


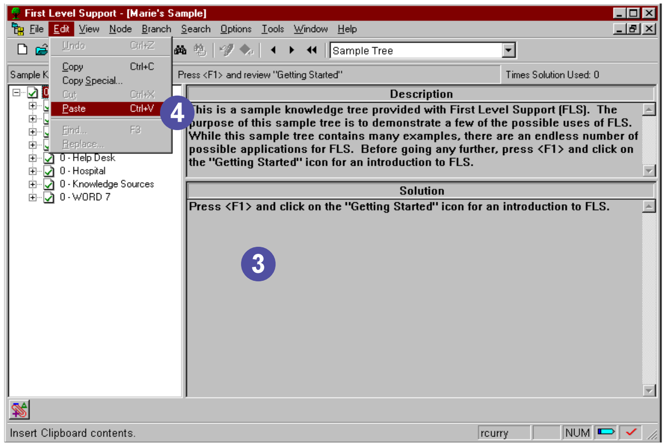
Copying Text Into First Level Support

You can copy plain text (ASCII format) from other Microsoft Windows applications into First Level Support by using the Copy and Paste functions. First Level Support does not support word processor formatting such as boldface text or special fonts. Tabs are preserved, but you cannot set tabs from First Level Support.

Copy Text into First Level Support

1. Copy **text** from the other application.
2. Select **Edit** from the **Node** menu.
3. Place the **cursor** where you want to paste the text.
4. Select **Paste** from the **Edit** menu.





Printing Information

First Level Support offers fast and simple printing to help you capture information from a knowledge tree. You can print a single node or an entire tree.

Page numbers are automatically placed at the bottom of each page.

Certain text printing options are preset. These options cannot be changed within First Level Support:

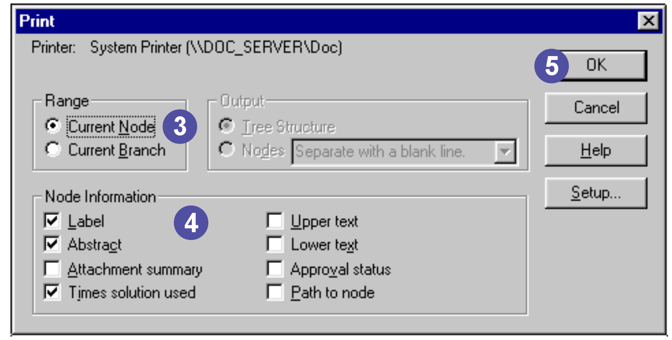
- **Font:** Times Roman (or closest equivalent on your printer)
- **Size:** 10 point
- **Margins:** 0.5 inches on all sides
- **TAB stops:** 0.5 inches

TIP

If you need more control over the look of your printed output, print to a File destination. Then use a word processor to format the output file to your specifications.

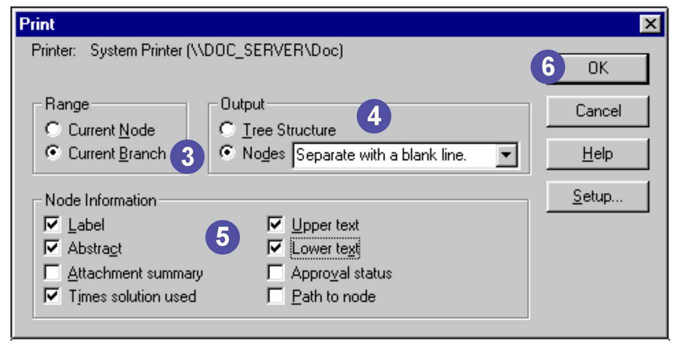
Print a Single Node

1. Highlight the **node** to print.
2. Select **Print** from the **File** menu.
3. Select **Current Node**.
4. Select the **parts of the node** you want to print.
5. Click **OK**.



Print a Branch

1. Highlight the branch to print.
2. Select **Print** from the **File** menu.
3. Select **Current Branch**.
4. Select **Tree Structure** to print a graphic representation of the tree. Select **Nodes** to print the text stored in each node.
5. Select the **parts of the node** you want to print.
6. Click **OK**.

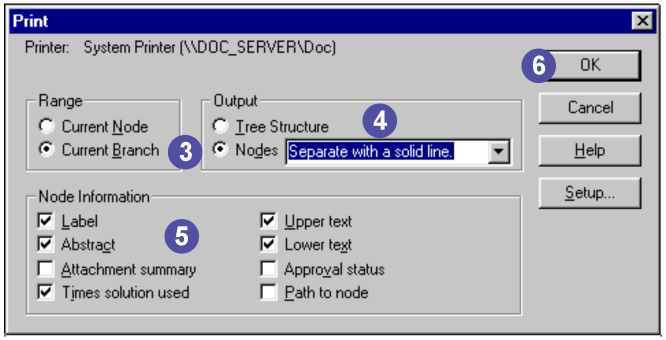


TIP

First Level Support can print 32 levels of nodes in a single branch. Nodes at the 33rd level or beyond, relative to the branch's parent node, do not appear in a printout.

Print a Knowledge Tree

1. Highlight the **tree** to print.
2. Select **Print** from the **File** menu.
3. Select **Current Branch**.
4. Select one output option:
   - **Tree Structure:** Prints a graphic representation of the node labels and branch icons.
   - **Nodes:** Prints the text stored in each node, in the order the nodes would appear in the Tree display or a Structure printout. You must also select a separator type from the drop-down box.
5. Select the **parts of the node** you want to print.
6. Click **OK**.



Creating Knowledge Trees

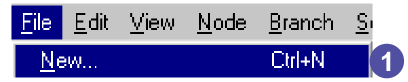
All First Level Support users can create new knowledge trees, even if they do not have security rights to edit an existing tree.

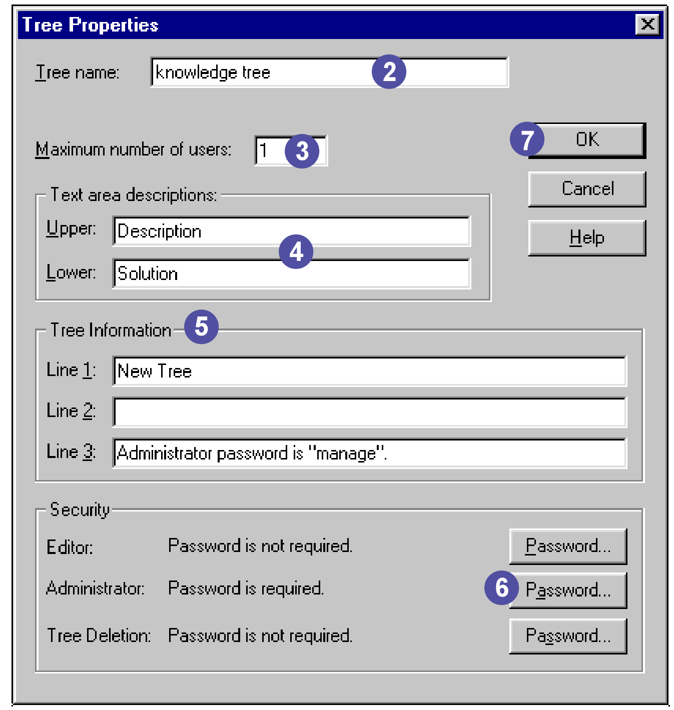
TIP

You can type three lines of text that describe the current knowledge tree or record copyright information. You may type 70 characters per line.

Create a Tree

1. Select **New** from the **File** menu.
2. Enter the **filename** for the new tree.
3. Enter the maximum **number of users** with simultaneous access to this tree. A zero grants unlimited access.
4. Enter **names** for the upper text area and lower text area in the **Text** area descriptions box.
5. Enter a **description** for the current knowledge tree or record copyright information in the **Tree Information** box.
6. Click **Password** to set up a password for Administrator.
7. Click **OK**.





Customizing First Level Support

You can customize First Level Support to meet your needs. For example, you can adjust the sizes of the Tree display, the upper text area, and the lower text area. You can also hide or display the Attachment Bar, Toolbar, Status Bar, text area captions, and Times Solution Used.

Customize First Level Support

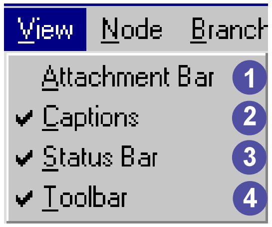
1. Select **Attachment Bar** from the **View** menu to hide or display the Attachment Bar.

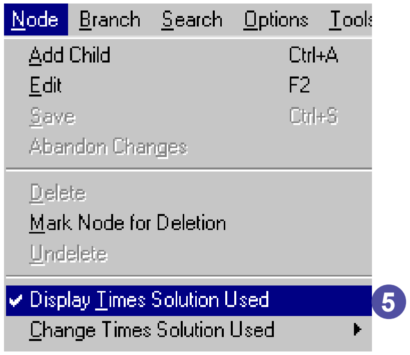
2. Select **Captions** from the **View** menu to hide or display the captions on upper and lower text areas.

3. Select **Status Bar** from the **View** menu to hide or display the Status Bar.

4. Select **Toolbar** from the **View** menu to hide or display the Toolbar.

5. Select **Display Times Solution Used** from the **Node** menu to hide or display the Times Solution Used.



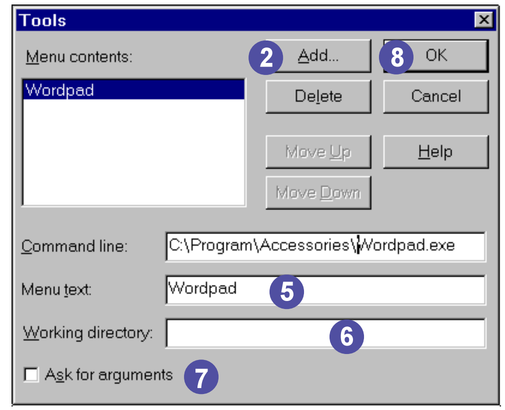


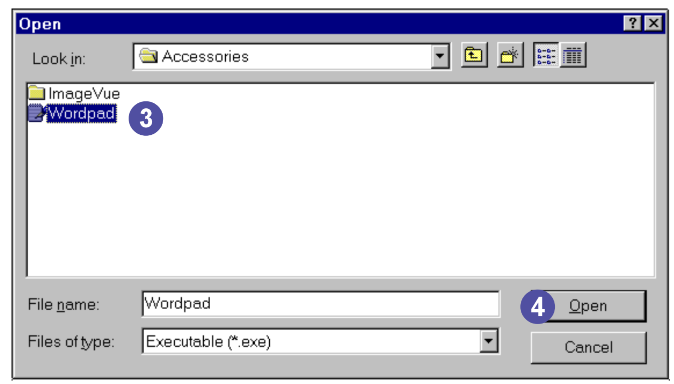
Adding Links to Other Programs

You can build a list of shortcuts to your favorite programs and tools. Any application file (.EXE or .COM) or Program Information File (.PIF) can be added to the Tools menu, then launched directly from First Level Support.

Add a Link

1. Select **Configure** from the **Tools** menu. The **Tools** dialog box appears. The **Menu Contents** displays the current list of programs in the **Tools** menu.
2. Click **Add**.
3. In the **Open** dialog box, navigate to the application or PIF you want to add to the **Tools** menu.
4. Click **Open**.
5. Enter the **title** you want to appear in the **Tools** menu.
6. If your application needs to be run from a particular directory, enter the **directory** in the **Working** field.
7. Check **Ask for arguments** to allow arguments, such as a file name, to be passed to the program before it launches this application.
8. Click **OK**.



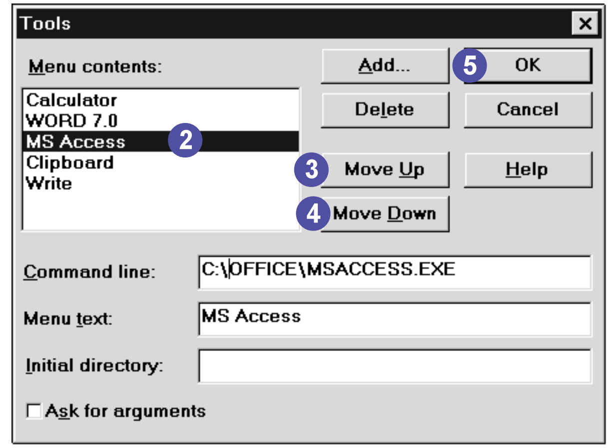


TIP

When you rearrange or delete a tool in First Level Support, only the link to the tool is removed. The application or file does not get removed from your system.

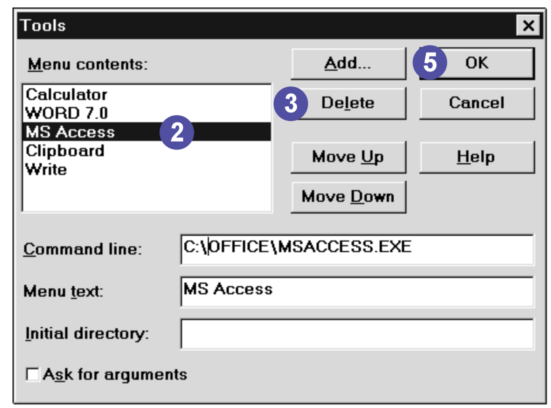
Rearrange Link List

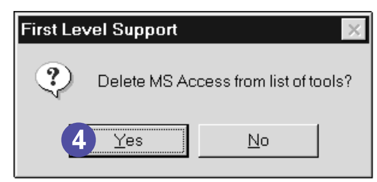
1. Select **Configure** from the **Tools** menu.
2. Highlight an **application name** in the **Menu Contents** dialog box.
3. Click **Move Up** to move the item up in the list.
4. Click **Move Down** to move the item down in the list.
5. Click **OK**.



Delete a Link

1. Select **Configure** from the **Tools** menu.
2. Highlight an **application** name in the **Menu Contents** dialog box.
3. Click **Delete** to remove the link.
4. Click **Yes**.
5. Click **OK**.





7

Reports

IN THIS CHAPTER

HEAT can produce reports about your support center and customers. You can view a report on-screen or print it. HEAT gives you several ways to produce reports:

- **HEAT Answer Wizard** — You can run over 250 predefined reports, or create your own.
- **Crystal Reports** — You can create reports with the industry's leading report writer, and produce them from Call Logging.
- **Call Logging** — You can print, view, or e-mail information from a Call Record. A printed Call Record can include information from the Profile Subset, the Call Log, Details, Assignment, and Journal.

HEAT Answer Wizard Reports

HEAT Answer Wizard reports answer key business questions. You can use one of the standard reports, or create new ones. HEAT Answer Wizard has six categories of reports:

- **Favorite Reports:** contains copies of any reports you have saved to this directory.
- **HEAT**: contains predefined reports specifically related to HEAT.
- **Combined Reports:** contains predefined reports that use information from HEAT and the Manager's Console.

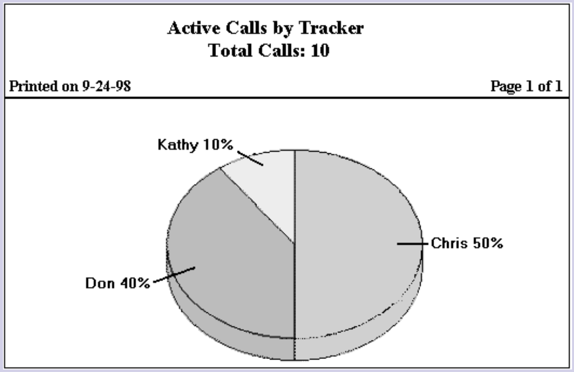
You must have the appropriate security rights to access information from each module.

For more information refer to the HEAT Answer Wizard User's Guide in the System Administrator manual.

Active Calls by Tracker

Printed on 9/16/98

Call ID	Cust ID	Status	Call Type	Priority	Received	
Chris # Calls: 5						
00000047	MH7435	Open	Software	4	4/4/98	15:21:36
00000050	000350	Open	Software	3	4/5/98	10:28:48
00000051	FRSOFT	Open	Training	4	4/6/98	08:38:24
00000057	HK5935	Responded	Network	3	4/9/98	12:57:36
00000064	GJ7142	Responded	Word 7	2	4/13/98	13:38:18
Don # Calls: 4						
00000029	AGDOOR	Solved	Printing	3	3/26/98	13:24:10
00000040	GB4435	Open	Printing	1	4/1/98	14:09:36
00000055	JL5635	Open	Purchase Order	3	4/8/98	15:21:36



Crystal Reports

Crystal Reports is a report generator application that comes with HEAT. With it, you can design, create, and print reports. You can select a report format, or design your own. Each report can extract information from a data file or database, and display the information in the selected format. After you design a report, you can run it from Call Logging.

For more information, refer to the Crystal Reports User's Guide.

Call Summary by Status and Priority

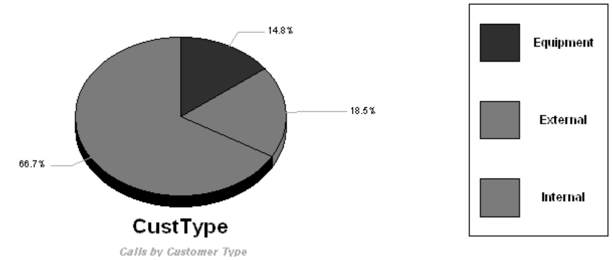
Date: 12/28/1998 Page: 1

Status	Total Call Records	% of Group	% of Total
CLOSED			
Priority: 3	3	75.00%	11.11%
Priority: 4	1	25.00%	3.70%
Total:	**4**		**14.81%**
OPEN			
Priority: 1	1	6.67%	3.70%
Priority: 3	14	93.33%	51.85%
Total:	**15**		**55.56%**
RESPONDED			
Priority: 2	1	12.50%	3.70%
Priority: 3	6	75.00%	22.22%
Priority: 4	1	12.50%	3.70%
Total:	**8**		**29.63%**

Total Call Records processed: 27

Calls by Customer Type - Summary

Date: 12/28/19 Page: 1



Calls for Customer Type	Equipment	4
Calls for Customer Type	External	5
Calls for Customer Type	Internal	18
Total Calls		**27**

Running Crystal Reports

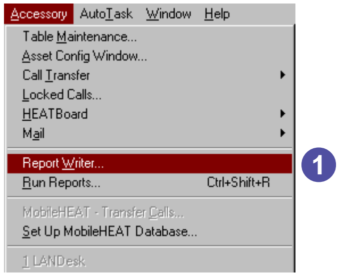
You can start Crystal Reports from Call Logging. Before running Crystal Reports, you must set the path to the application through User Preferences.

SEE ALSO

Setting Paths in "User Preferences," Chapter 10.

Run Crystal Reports

1. Select **Report Writer** from the **Accessory** menu.

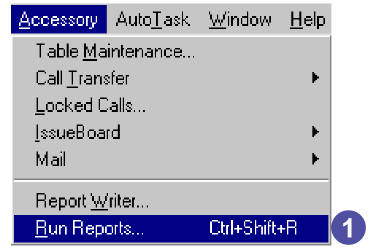


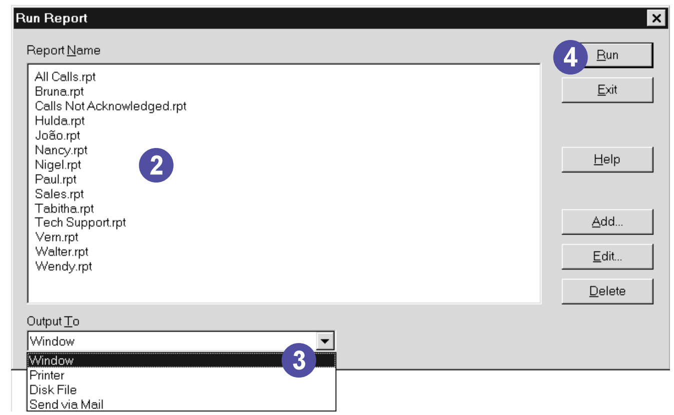
Displaying Crystal Reports

After you create and save a report with Crystal Reports, you can display it from Call Logging.

Display a Report

1. Select **Run Reports** from the **Accessory** menu.
2. Select the **report** to display.
3. Select **Window** in the **Output To** drop-down box.
4. Click **Run**.



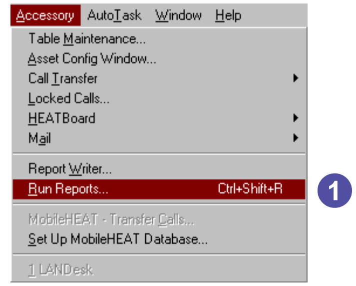


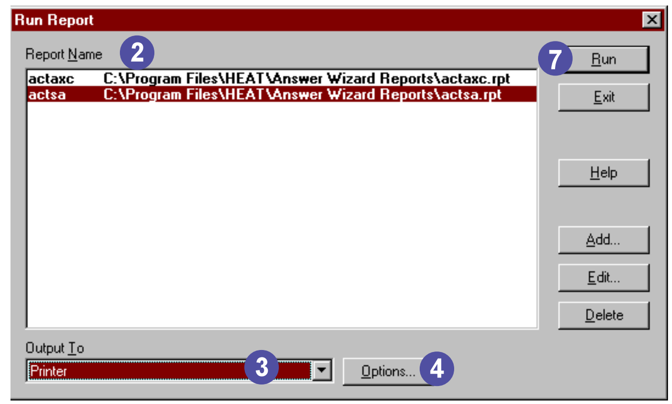
Printing Crystal Reports

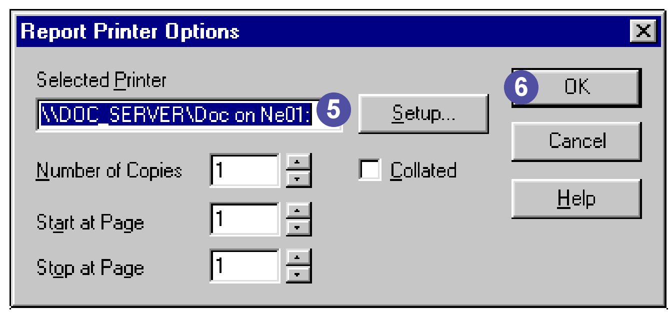
You can print a report created in Crystal Reports from within Call Logging.

Print a Report

1. Select **Run Reports** from the **Accessory** menu.
2. Select the **report** to print.
3. Select **Printer** in the **Output To** drop-down box.
4. Click **Options**.
5. Select **printer options**.
6. Click **OK**.
7. Click **Run**.





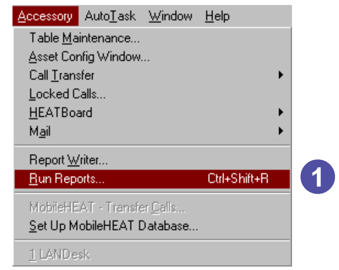


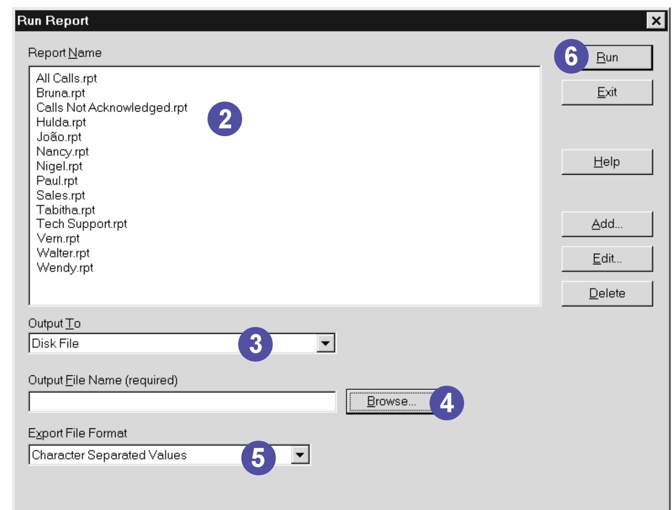
Saving Reports

You can save a report to a file on disk.

Save a Report

1. Select **Run Reports** from the **Accessory** menu.
2. Select the **report** to save.
3. Select **Disk File** in the **Output To** drop-down box.
4. Click **Browse** to locate the output file name or type the name in the **Output File Name** box
5. Select an **export file format**.
6. Click **Run**.



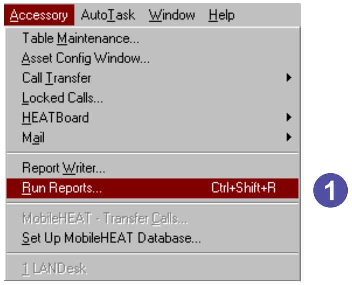


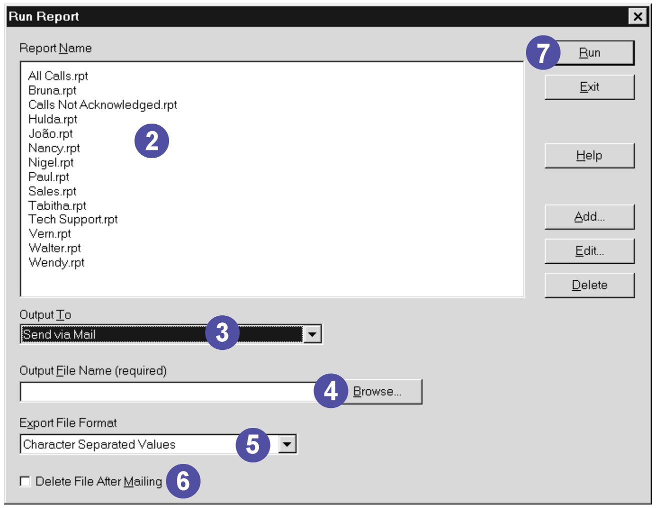
E-Mailing Reports

From Call Logging, you can e-mail a report created in Crystal Reports.

E-Mail a Report

1. Select **Run Reports** from the **Accessory** menu.
2. Select the **report** to e-mail.
3. Select **Send via Mail** in the **Output To** drop-down box.
4. Click **browse** to locate the output file name.
5. Select an **export file format**.
6. Click **Delete File After Mailing** if you want the file deleted after it is sent.
7. Click **Run**.

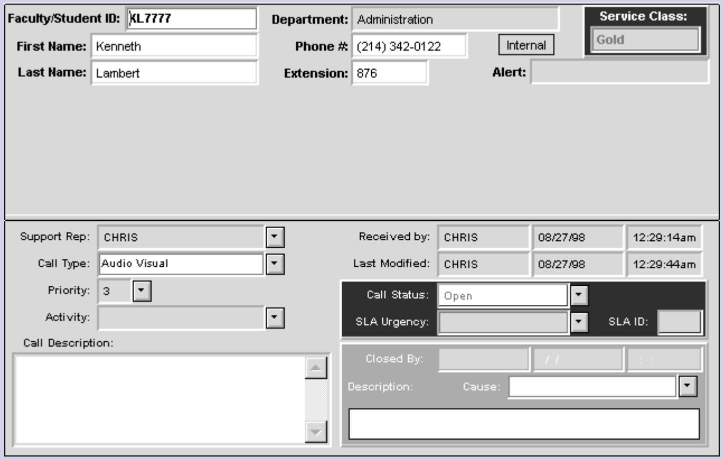




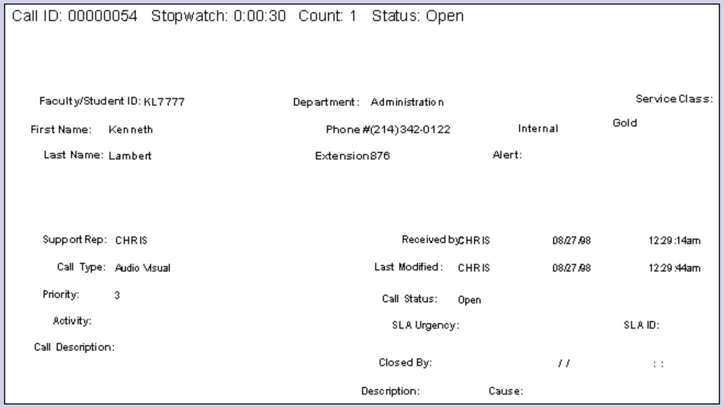
Call Logging Reports

A Call Record, also called a Call Ticket, is an electronic record of a support center Call. The example shown includes information about the customer, Call Log, Call Details, Assignments, and Journals.

You can print information from a Call Record as shown on the right. You can also view a Call Record on-screen, save its data in a file, or send it by e-mail.



Call Record



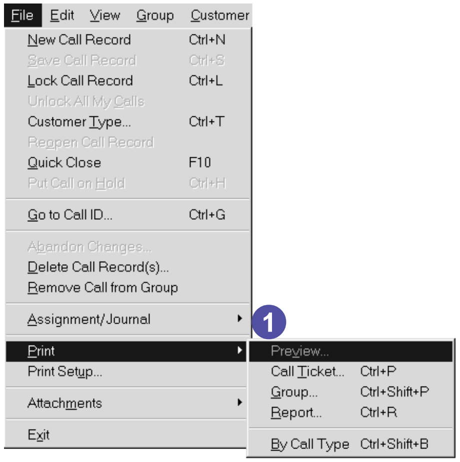
Printout of Call Record

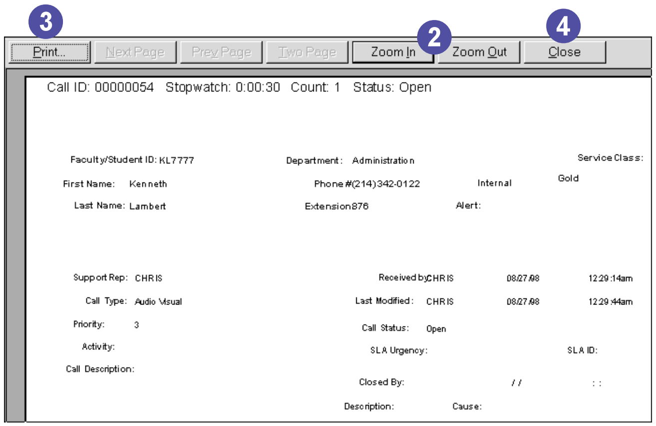
Previewing Call Tickets

Use Print Preview to view a Call Ticket on-screen before you print it.

Preview a Call Ticket

1. Select **Print>>Preview** from the **File** menu.
2. Use the **Preview** window buttons to view the Call Ticket.
   - **Next page —** Displays the next page.
   - **Prev page —** Displays the previous page.
   - **Two page —** Displays two pages at a time.
   - **Zoom in —** Magnifies the preview image.
   - **Zoom out —** Reduces the preview image.
3. Click **Print** to print the Call Ticket.
4. Click **Close** to close the preview window.





Printing Call Tickets

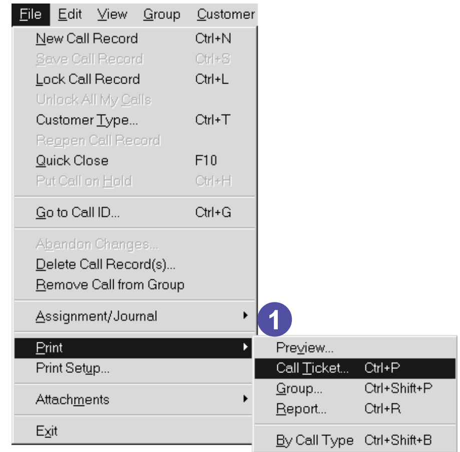
You can print the current Call Ticket from Call Logging. A Call Record must be saved before it can be printed.

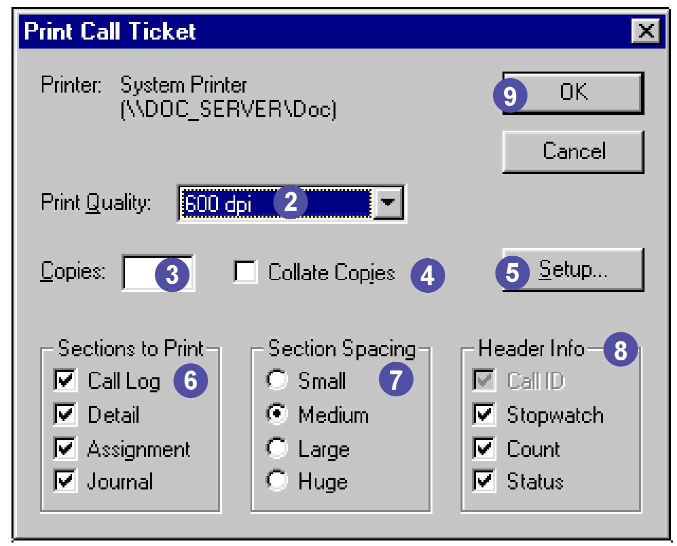
TRY THIS

Set up custom Call Ticket printing using AutoTask. See "AutoTask," Chapter 8.

Print a Call Ticket

1. Select **Print>>Call Ticket** from the **File** menu.
2. Select a **Print Quality**, if your printer offers a choice.
3. Type the **number of copies** to print in the **Copies** field.
4. Check **Collate Copies** to collate multiple pages (if available).
5. Click **Setup** if you want to specify a different printer.
6. Select the parts of the **Call Record** to print from the **Sections to Print** box.
7. Select a **spacing option** in the **Section Spacing** box.
8. Select key **items to print** above each Call Ticket from the **Header Info** box.
9. Click **OK**.



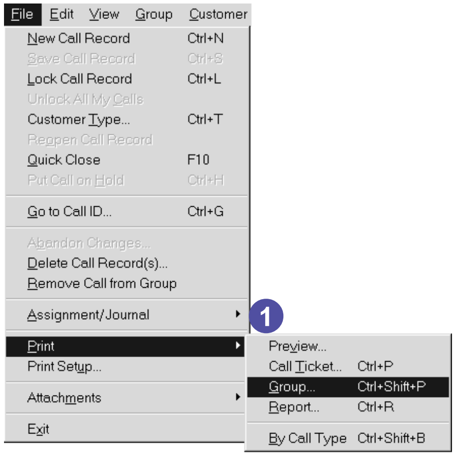


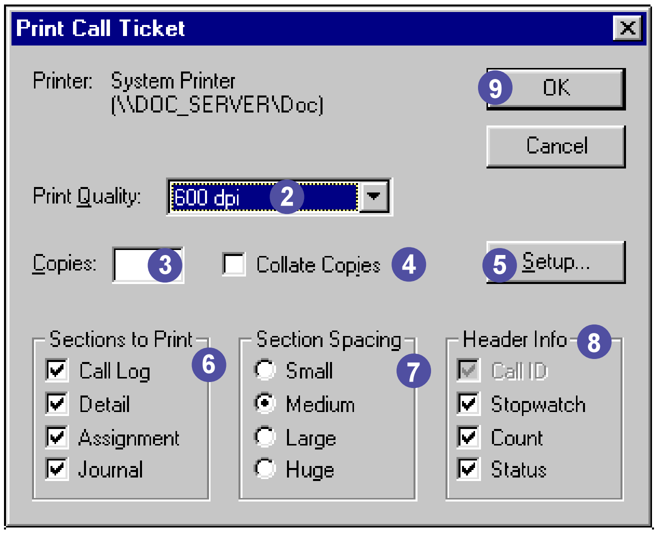
Printing Call Tickets for a Call Group

You can print a Call Ticket for each Call Record in the current Call Group. A Call Record must be saved before it can be printed.

Print Call Tickets for a Call Group

1. Select **Print>>Group** from the **File** menu.
2. Select a **Print Quality**, if your printer offers a choice.
3. Enter the **number** of copies to print in the **Copies** field.
4. Check **Collate Copies** to collate multiple pages (if available).
5. Click **Setup** to change the printer settings.
6. Select the parts of each **Call Record** to print.
7. Select a **spacing** option.
8. Select the **items** you want printed above each Call Ticket.
9. Click **OK**.



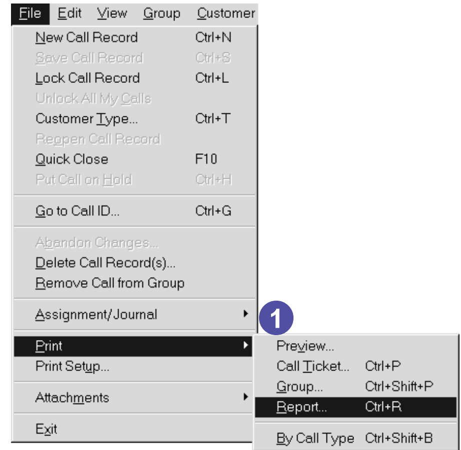


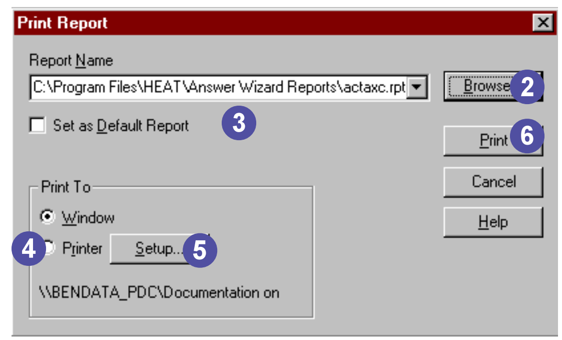
Printing Reports

After you create reports with Crystal Reports, you can print them from Call Logging.

Print a Report

1. Select **Print>>Report** from the **File** menu.
2. Click **Browse** to select a report, or select one from the drop-down menu.
3. If you check the **Set as Default Report** check box, this report appears in the drop-down box.
4. Click **Printer**.
5. Click **Setup** to change the printer if you don't want to print from the default printer.
6. Click **Print**.





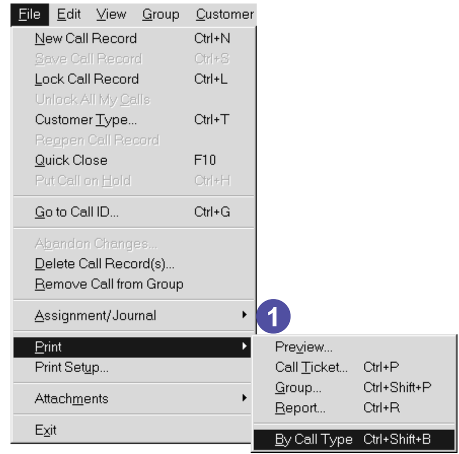
Printing by Call Type

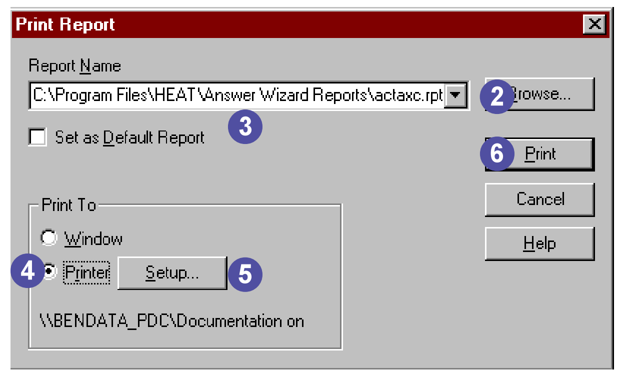
Print By Call Type prints Crystal Reports based on the currently displayed Call Record. It uses a separate Crystal Report for each call type and prints the report to a specific printer. For example, you can use this print method to set up a report for all Software Call Tickets and print them to the HP LaserJet IV in your department.

The Call Type reports must be defined in Crystal Reports before you can print by call type. Your system administrator can tell you which reports are available in your system.

Print a Call Type

1. Select **Print>>By Call Type** from the **File** menu.
2. Click **Browse** to select a report, or select one from the drop-down menu.
3. If you check the **Set as Default Report** check box, it will set this report as the default when printing.
4. Click **Printer**.
5. Click **Setup** to change your printer settings, if necessary.
6. Click **Print**.





8

AutoTask

IN THIS CHAPTER

AutoTask lets you link a series of actions to a task. With one click, AutoTask follows a series of steps that you have defined, saving you time and effort.

You may often perform tasks such as sending e-mail, paging, and running reports. With AutoTask, you can define the Actions you need to accomplish, combine them in a Task, and run the Task from a button on the toolbar.

AutoTask automates the process of creating an Activity Log, printing a Call Record, or writing information to a file. AutoTask can update Call Records and create new Call Records.

You can set up a Task to perform one or more steps. AutoTask will follow any set of logical Call Logging instructions.

Running an AutoTask

You can run an AutoTask three ways.

From the AutoTask window, you can run a Task against the current Call Record or the current Call Group.

From the menu, you can run a Task against the current Call Record.

From the toolbar, you can run a Task against the current Call Record.

You can see different AutoTasks in different views.


The **Personal** view displays your personal AutoTasks.

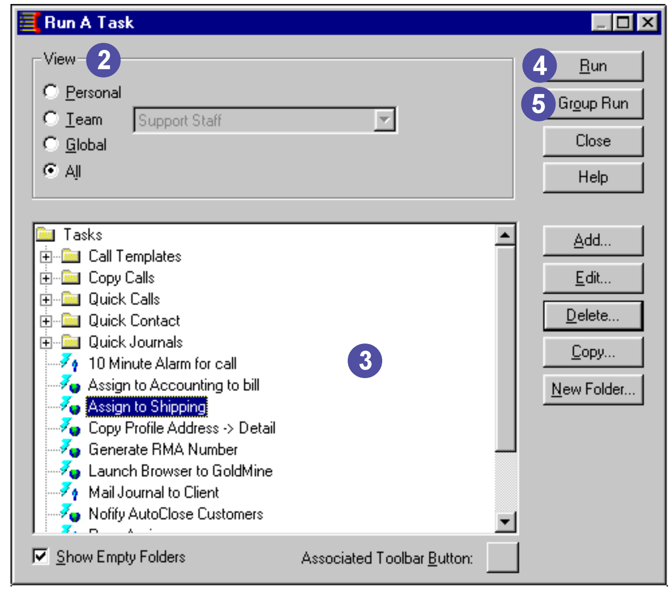

The **Team** view displays all AutoTasks associated with the selected team.

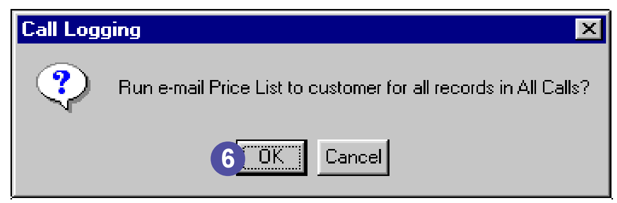

The **Global** view displays all the AutoTasks created in the Global view.


The **All** view displays personal, primary team, and global AutoTasks.

Run a Task from the AutoTask Window

1. Select **Run/Edit a Task** from the **AutoTask** menu.
2. Select the **view** where the Task is saved. If you select the Team view, choose a team from the drop-down box.
3. Select the **Task** you want to run.
4. To run the Task against the current Call Record, click **Run**.
5. To run the Task against the current Call Group, click **Group Run**.
6. Click **OK**.





TIP

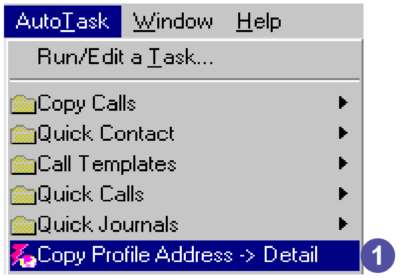
You can set up frequently used tasks on the Call Logging toolbar or AutoTask menu for easy access.

SEE ALSO

Creating Toolbar Buttons and Creating Menu Items to Run Tasks, in this chapter.

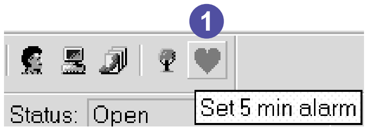
Run a Task from the Menu

1. Select an **AutoTask item** from the **AutoTask** menu.



Run a Task from the Toolbar

1. Click the **toolbar button** associated with your Task.

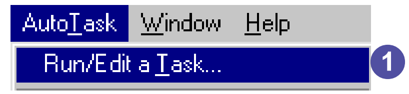


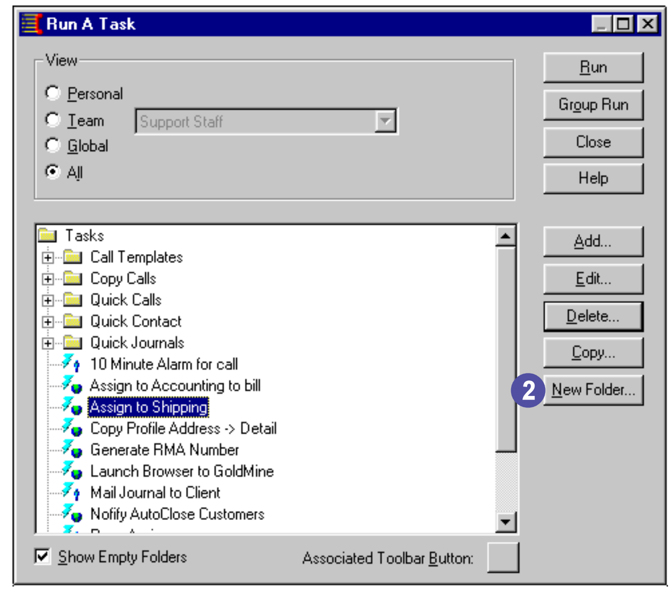
Creating Folders

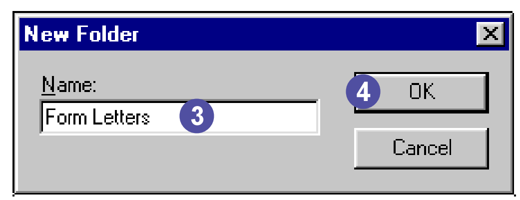
You can organize your AutoTasks in folders. This procedure explains how to create a folder.

Create a Folder

1. Select **Run/Edit a Task** from the **AutoTask** menu.
2. Click **New Folder**.
3. Type a **name** for the folder.
4. Click **OK**. The new folder appears in the AutoTask window.







Creating Tasks

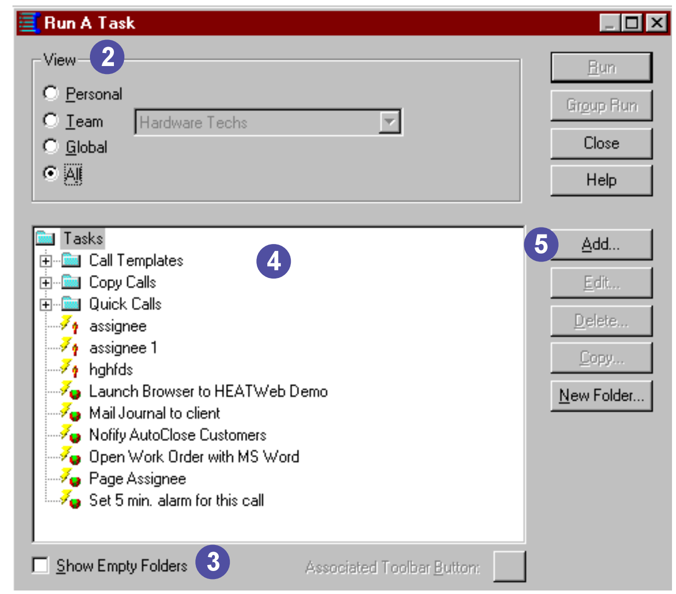
An AutoTask is a task that contains one or more actions. When you create an AutoTask, you must first name the task and save it. After that is completed, you can start adding the actions the task will perform. The following steps show you how to begin setting up a task.

TIP

You can save a task in a personal view, in team view for a team you belong to, or a global view. You can see all of these views by clicking All, but you cannot save to the All view.

Create an AutoTask

1. Select **Run/Edit a Task** from the **AutoTask** menu.
2. Click a view where the new task will appear.
3. To see empty folders, click **Show Empty Folders**.
4. Select a **folder** where the new task will be stored.
5. Click **Add**.
6. Go to the next page.



After you create the Task, add an Action. A task can have one or more actions, but each must be set up separately.

You can add any of the following Actions, as described on the next few pages:

- **Create an Alarm**
- **Send a Message**
- **Run a Program**
- **Write a File to Disk**
- **Print Call Ticket Information**
- **Create Activity Log Record**
- **Create a Call**
- **Create an Assignment**
- **Create a Journal Entry**
- **Update a Call**

Create an AutoTask

7. Type a name for this Task.

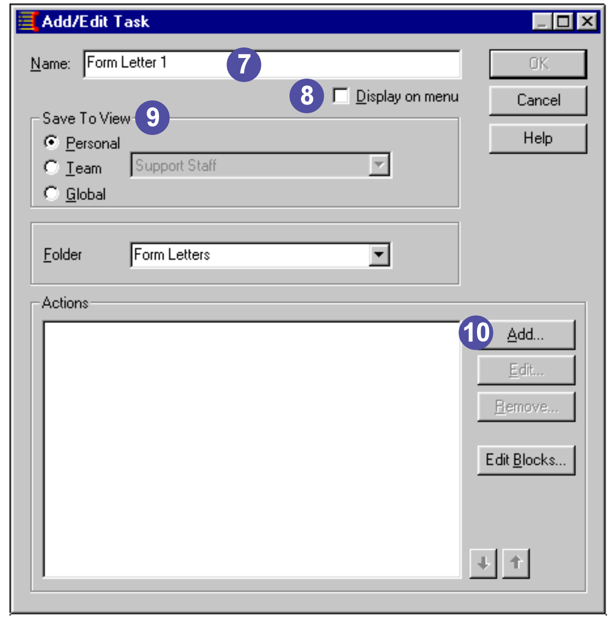
8. If you want this task to appear on the menu, click **Display on menu**.

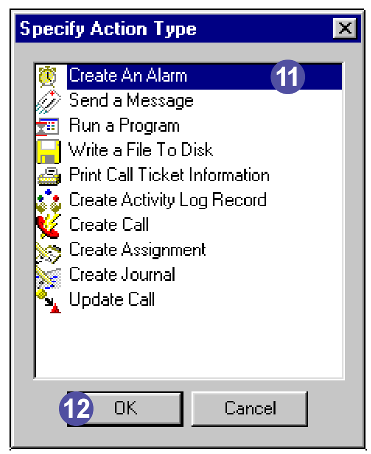
9. Select the **view** where this Task will be saved. If you select the Team view, select a team from the drop-down box.

10. Click **Add**. The **Specify Action Type** dialog box appears.

11. Select the first **Action** to be performed by this Task.

12. Click **OK**. See the following pages for instructions for each Action. Depending on your security rights, the following Actions can appear in the **Specify Action Type** dialog box.





Creating Alarms

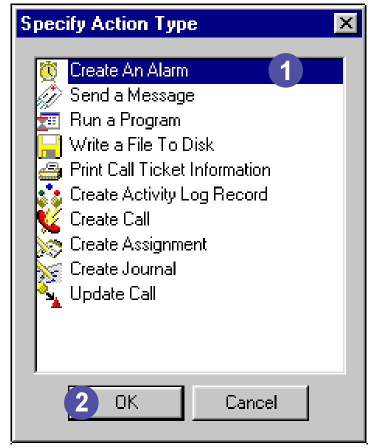
Use an alarm to remind you to perform a Task or to mark a time interval. For example, you can set an alarm to warn you that 5 minutes have elapsed since you began a Customer call. You can set alarms to remind you to call a customer, attend a meeting, or any other activity. You can also attach a Call Record to an alarm.

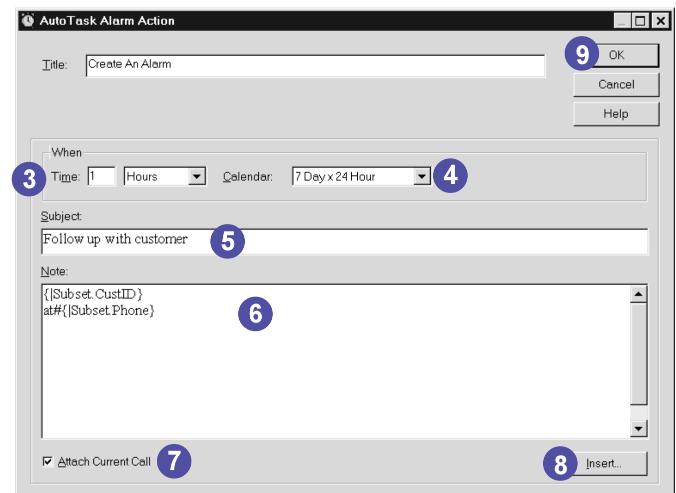
SEE ALSO

Complex Tasks, Inserting Variables and Additional Information, in this chapter.

Create an Alarm

1. Select **Create an Alarm**.
2. Click **OK**.
3. Set the **time** when the alarm will go off after the task runs.
4. Set the **calendar** you wish to use.
5. Type a **Subject name** for this alarm.
6. Type any descriptive text about this alarm.
7. Check the **Attach Current Call** box to attach a copy of the currently active call to this alarm.
8. Click **Insert** to add call information to the alarm.
9. Click **OK**.





Sending Messages

AutoTask can send a message to SupportMail or any VIM- or MAPI-compliant mail system. Your system administrator can tell you which mail system your company uses.

You can set up a message to send to a specific recipient, such as Joe Smith. You can also insert a field code that sends the message to recipients based on variable Call Information, such as {Asgnmnt.Assignee}.

You can attach a Call Record only to a SupportMail message.

TIP

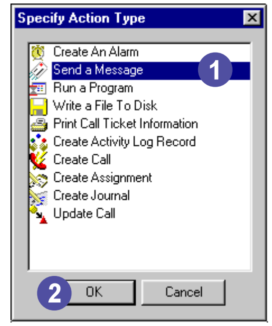
Type or select an address in the CC field to send a courtesy copy.

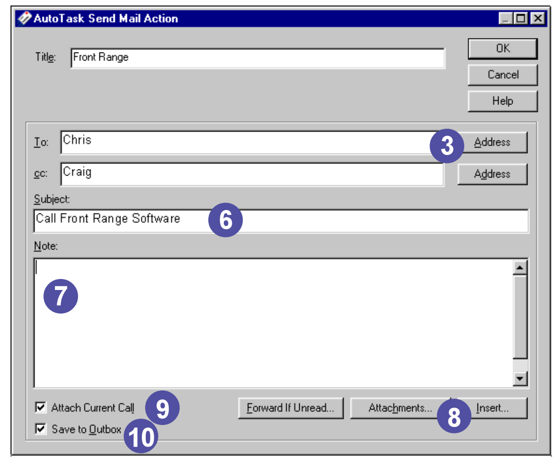
SEE ALSO

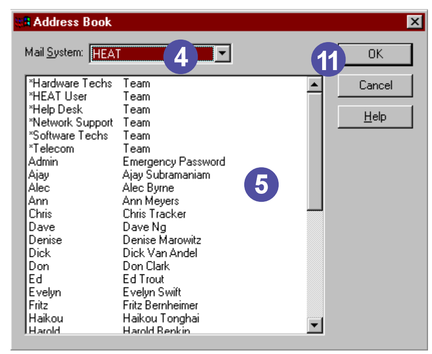
Complex Tasks, Inserting Variables and Additional Information, in this chapter.

Send a Message

1. Select **Send a Message**.
2. Click **OK**.
3. Click **Address**.
4. Select the **mail system**.
5. Double-click the **recipient**.
6. Type the **message subject** in the **Subject** field.
7. Type the **message** in the **Notes** field.
8. Click **Insert** to add variables to a field.
9. Click the **Attach Current Call** check box to attach the currently displayed Call Record to a mail message.
10. To save this message in your Outbox for later reference, click **Save to Outbox**.
11. Click **OK**.







Forwarding Unread Messages

Sometimes an important message must be read within a particular timeframe. If the primary recipient doesn't read the message, another individual should read it.

With AutoTask, you can send a message that is forwarded to another person, if the primary recipient doesn't read it within a specified time.

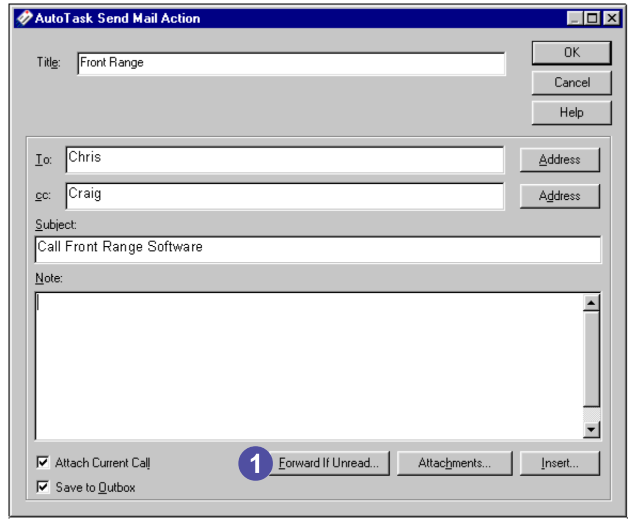
This feature works only with SupportMail, although you can forward a message to any VIM or MAPI address.

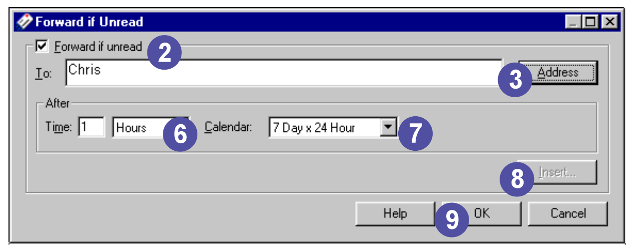
SEE ALSO

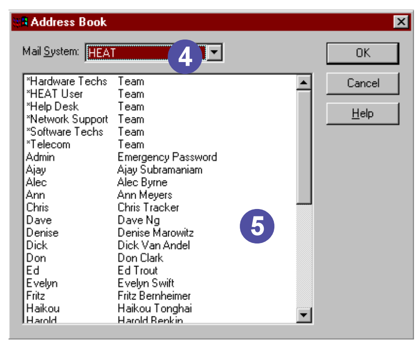
Attaching a File, and Inserting Variables and Additional Information, in this chapter.

Forward a Message

1. Click **Forward if Unread**.
2. Check the **Forward if Unread** check box to activate the dialog box.
3. Click **Address**.
4. Select the **mail system**.
5. Double-click the **recipient**.
6. Set the amount of **time** that should elapse before this message is forwarded.
7. Set the **calendar** to use.
8. Click **Insert** to add information to the recipient list.
9. Click **OK**.







Attaching Files to Messages

When you send an e-mail message, you can attach a file that gives the recipient more information about a particular Call Record.

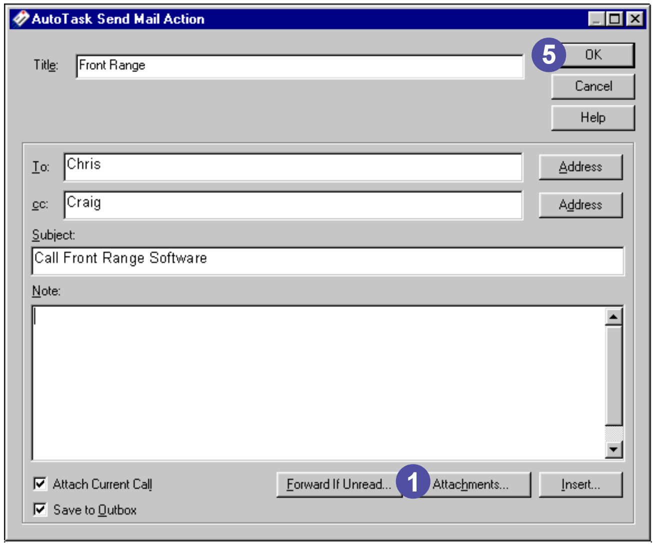
File attachments are only supported by VIM or MAPI systems.

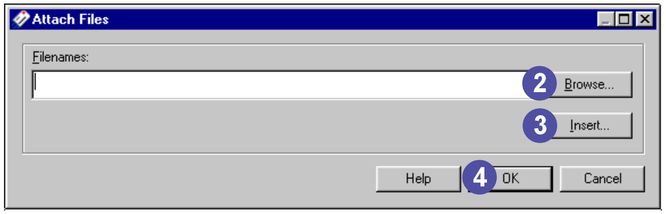
SEE ALSO

Complex Tasks, Inserting Variables and Additional Information, in this chapter.

Attach a File

1. Click **Attachments**.
2. Type the **path** of the file or click **Browse** to navigate to the file location.
3. Click **Insert** to insert variables, such as filenames or counters.
4. Click **OK**.
5. Click **OK**.





Running Programs

Use Run a Program to launch a program. For example, you can set up a Task to run a paging program to page your assignee. This function can launch file types such as .exe, .bat, and .com.

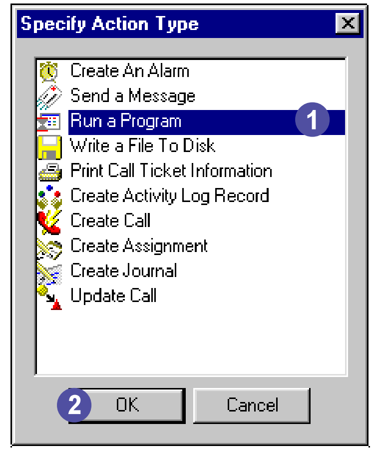
You can add arguments in the Run a Program dialog box. An argument is any input that a program needs to run. For example, if you have a program that dials a pager, that program may require the pager number as an argument. Not all pager programs accept arguments.

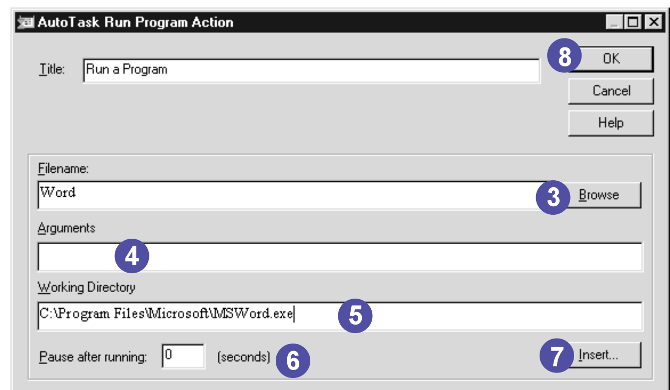
SEE ALSO

Complex Tasks, and Inserting Variables, in this chapter.

Run a Program

1. Select **Run a Program**.
2. Click **OK**.
3. Click **Browse** and navigate to the program file.
4. Define any **arguments** you want to pass to the program.
5. Type a **directory path** if your program must be run from a specific directory.
6. Type the **number of seconds** the program should wait after being launched. This keeps temporary files from being deleted too soon.
7. Click **Insert** to add additional information.
8. Click **OK**.





Writing Files to Disk

Use this function to capture files or temporary files for further use.

TRY THIS

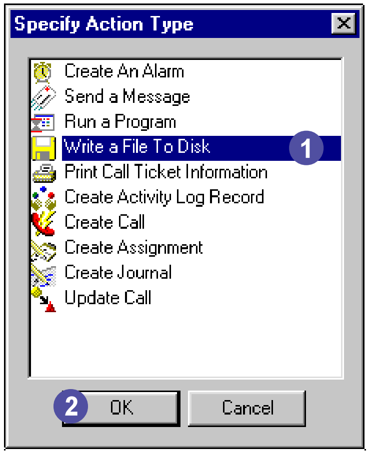
Capture Call Record information, write it to a temporary file, then pass it to an assignee's pager. The Call Record information appears on the pager. This gives the assignee the customer's Call Record, along with a request to call the customer back.

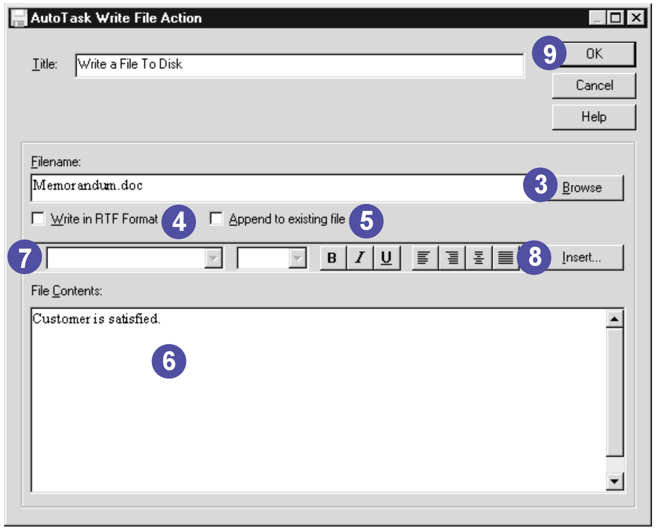
SEE ALSO

Complex Tasks, and Inserting Variables, in this chapter.

Write a File to Disk

1. Select **Write a File to Disk.**
2. Click **OK**.
3. Enter a **file name**, or click **Browse** to navigate to a file name.
4. If you want to convert this file to Rich Text Format, click **Write in RTF Format**.
5. If you want to add this information to a file, click the **Append to existing file** check box. The previous information will not be overwritten.
6. Type the information you want written to the file.
7. Use the formatting toolbar to format an **.rtf** file.
8. Click **Insert** to add variables to a field.
9. Click **OK**.





Printing Call Ticket Information

With this function, you can print selected fields of the current Call Record instead of printing the entire Call Record.

TRY THIS

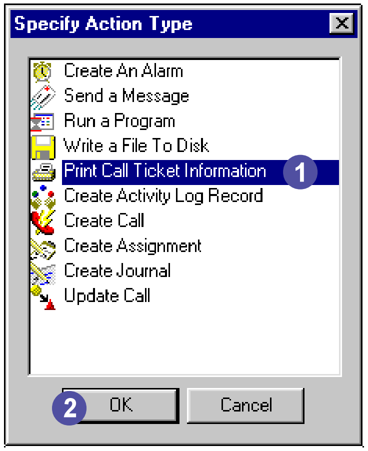
Click Insert to insert any fields from the call ticket that you want to include in the printout. After typing your text, you can format it using the standard text formatting toolbar above the message field.

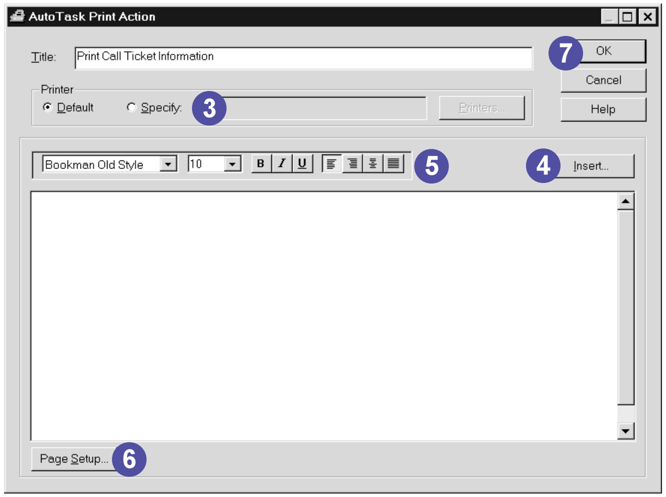
SEE ALSO

Complex Tasks, and Inserting Variables, in this Chapter.

Set up Printer

1. Select **Print Call Ticket Information**.
2. Click **OK**.
3. Select either the **default printer** or a **specific printer** to use when printing this information.
   - **Default**: Use the default printer.
   - **Specify**: Select any printer in your system. If you select Specify, click **Printers** and select a printer from the **Printer Setup** dialog box.
4. Click **Insert** to add information.
5. Set up formatting.
6. To set up a page, click **Page Setup**. Use the standard windows setup boxes.
7. Click **OK**.





Creating Activity Log Records

When activated by your system administrator, the Activity Log tracks activity within a Call Record.

For example, Call Logging creates an Activity Log record whenever the Stopwatch starts. An Activity Log tracks the name of the Tracker who has the Call Record open, the status of the record at that time, the number of minutes that the tracker worked on the record, and other information.

SEE ALSO

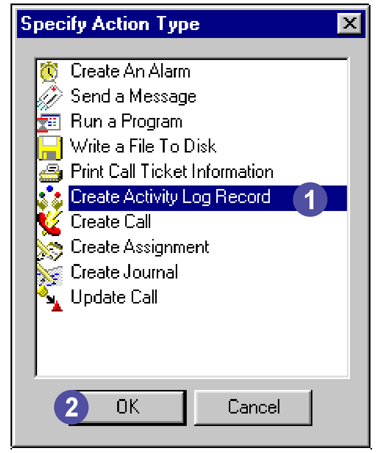
Complex Tasks, Inserting Variables and Additional Information, in this chapter.

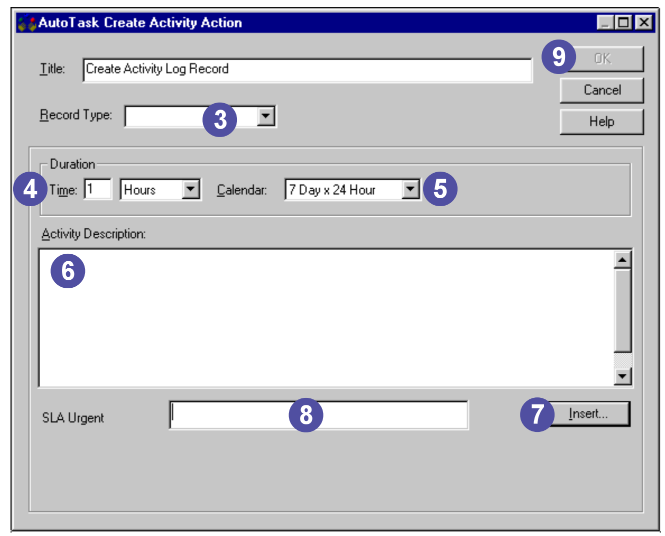
TRY THIS

When you send a Call Record to a tracker, you may want to create an Activity Log record to note when it was sent.

Create an Activity Log Record

1. Select **Create Activity Log Record**.
2. Click **OK**.
3. Select the **type** of record.
4. Select the **duration** of the activity.
5. Select the **calendar** to use for the duration cycle.
6. Type a **description** of this activity.
7. Click **Insert** if you want to add information to the log.
8. Fill in any remaining **fields**. Your system administrator defines which fields appear on this window so your screen may look different from our example.
9. Click **OK**.





Creating Call Records

You can use AutoTask to create a Call Record template that already has fields filled in. For example, create a Call Record template with the Cause Type, Call Description and Solution already set up in the Call Record.

A lightning bolt next to the field name identifies it as a required field. When you create a Call Action, supply a data value to each required field. If a required field has a default data value of "System," you do not have to supply a data value.

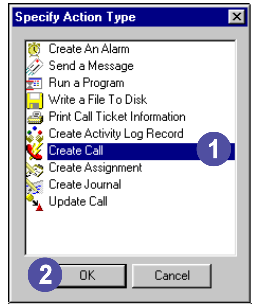
For new calls, you can create a new Call Record, use the current one, or ask for a prompt.

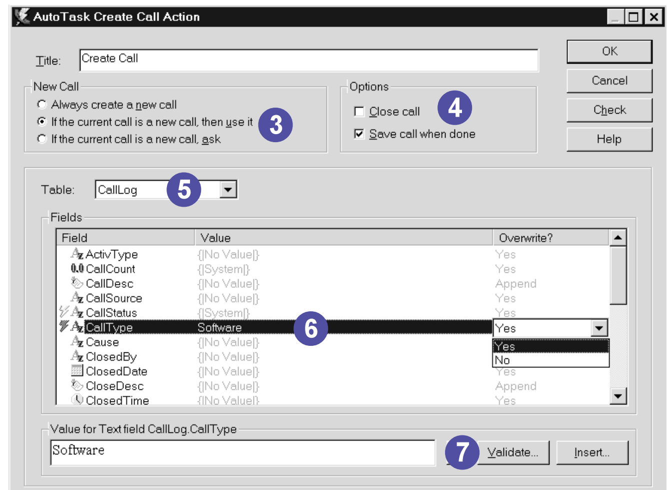
TIP

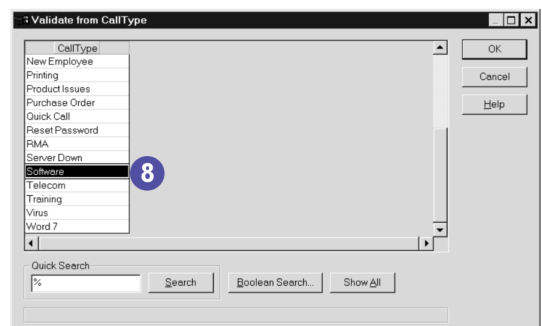
Use the Insert button to add information to the currently selected field.

Create a Call Record

1. Select **Create Call**.
2. Click **OK**.
3. Select a **New Call** option for opening the Call Record.
   - **Always create a new call** creates a new Call Record each time the AutoTask action is launched.
   - **If the current call is new call, then use it** uses the new Call Record when the AutoTask action is launched.
   - **If the current call is a new call, ask** prompts HEAT to ask which Call Record to use when the AutoTask action is launched.
4. Make a selection from **Options**.
5. Select a **table**.
6. Choose a **field** for which you want to specify a value.
7. Click **Validate**, if available.
8. Double-click a **data value**, if available.
9. Go to next page.







TIP

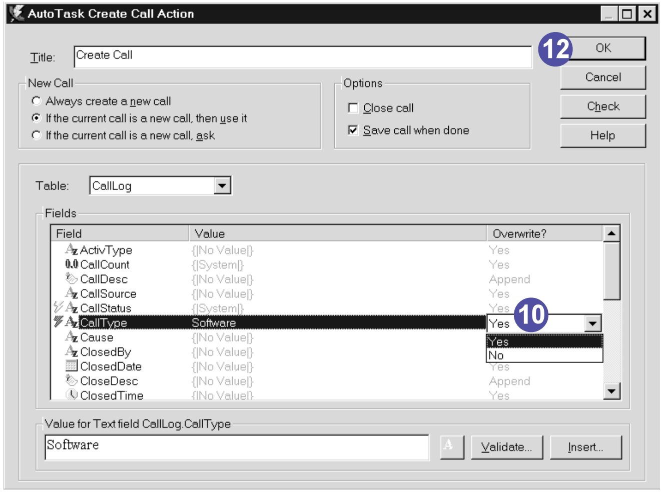
Use the Insert button to add information to the currently selected field. The button is active if the field contains data.

Create a Call Record

10. Select an **overwrite option** from the field's drop-down box. **Yes** overwrites existing values. **No** writes values in blank fields.

11. Repeat steps 6-10 for each field for which you want to specify a value.

12. Click **OK**.



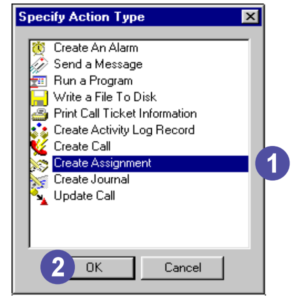
Creating Assignments

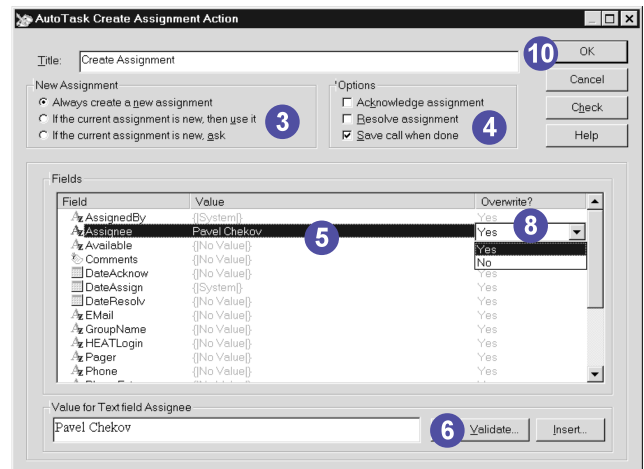
You can use AutoTask to create an Assignment.

If you select the Acknowledge Assignment option or the Resolve Assignment option, the data value changes in some fields.

Create an Assignment

1. Select **Create Assignment**.
2. Click **OK**.
3. Make a selection from **New Assignment** to open the Assignment.
   - **Always create a new assignment** creates a new assignment each time the AutoTask action is launched.
   - **If the current assignment is new, then use it** uses the new assignment when the AutoTask action is launched.
   - **If the current assignment is new, ask** prompts HEAT to ask which assignment to use when the AutoTask action is launched.
4. Make **selections** from **Options**. These options may change default data values in some fields.
5. Select a **field** for which you want to specify a value.
6. Go to next page.

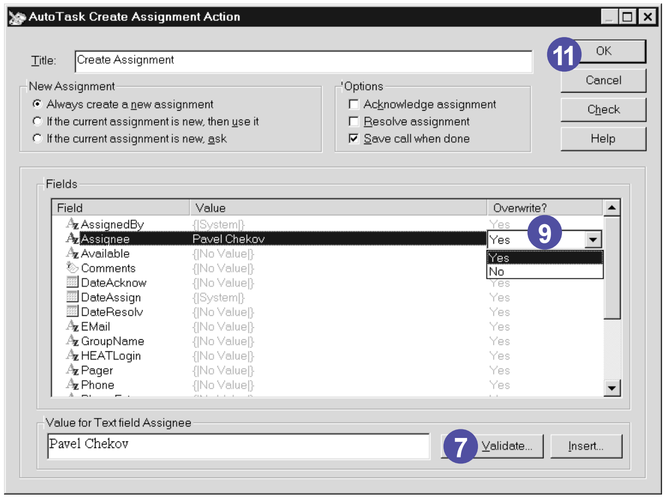


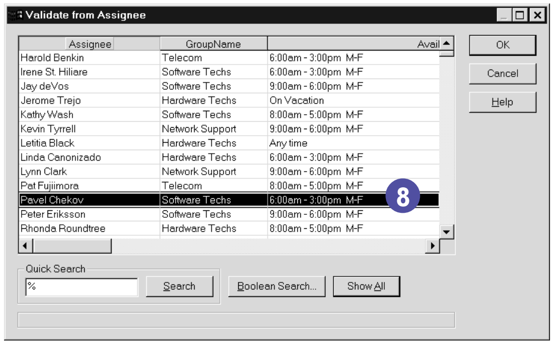


TIP

When the Insert button is active, you can use it to add information to the Assignment.

7. Click **Validate**, if available.
8. Double-click a **data value**, if available.
9. Select an **overwrite option** from the field's drop-down box. **Yes** overwrites existing values. **No** writes values in blank fields.
10. Repeat steps 5-8 for each desired field.
11. Click **OK**.



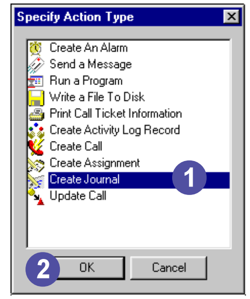


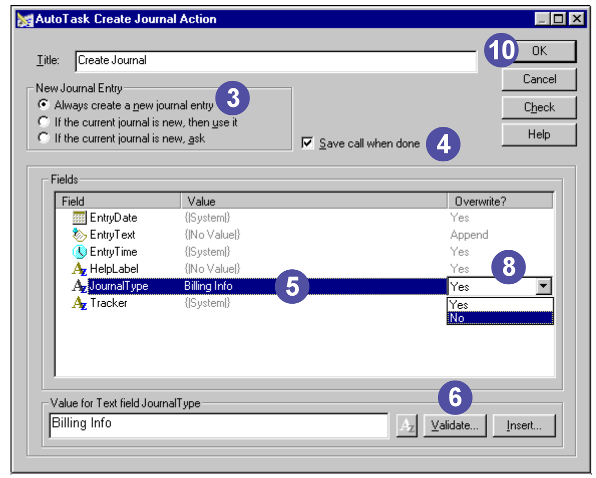
Creating Journals

You can use AutoTask to create a Journal entry.

Create a Journal

1. Select **Create Journal**.
2. Click **OK**.
3. Make a selection from **New Journal Entry** to open the Journal Entry.
   - **Always create a new journal entry** creates a new journal entry each time the AutoTask action is launched.
   - **If the current journal is a new call, then use it** uses the new journal entry when the AutoTask action is launched.
   - **If the current journal is new, ask** prompts HEAT to ask which journal entry to use when the AutoTask action is launched.
4. To save the Call Record when it is completed, click **Save call when done**.
5. Select a **field** for which you want to specify a value.
6. Click **Validate**, if available.
7. Go to next page.





TIP

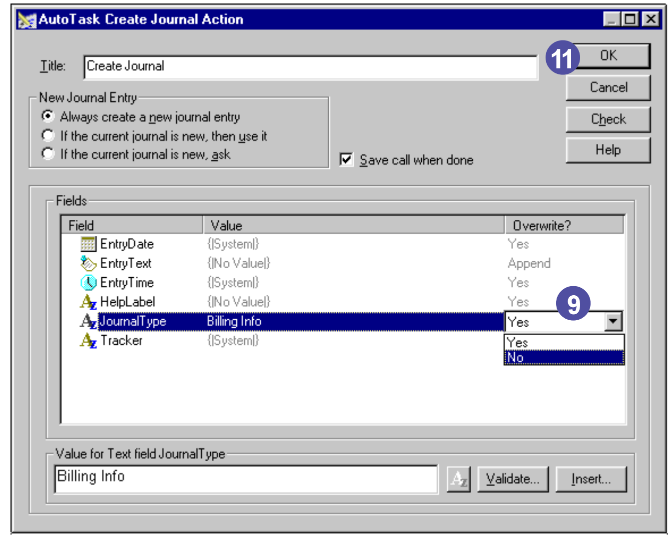
When the Insert button is active, you can use it to add information to the Call Record.

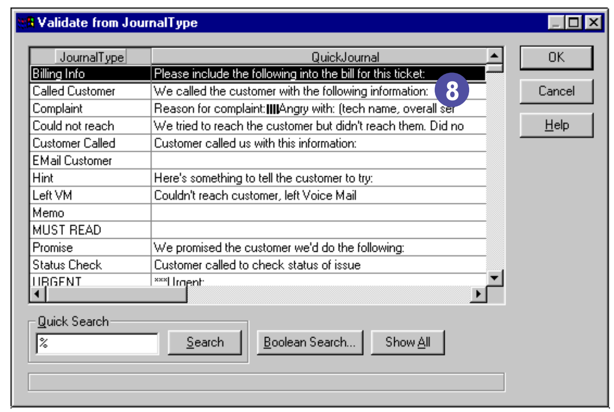
8. Double-click a **data value**, if available.

9. Select an **overwrite option** from the field's drop-down box. **Yes** overwrites existing values. **No** writes values in blank fields.

10. Repeat steps 5-8 for each desired field.

11. Click **OK**.





Updating Call Records

You can use AutoTask to update Call Records.

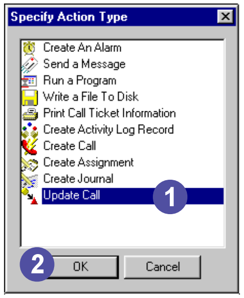
Fields with a "System" data value cannot be edited.

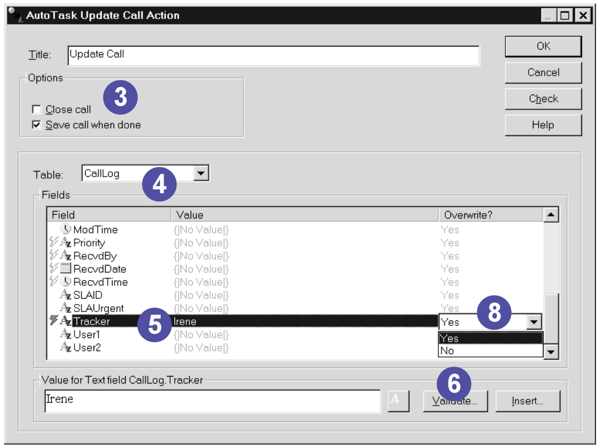
TIP

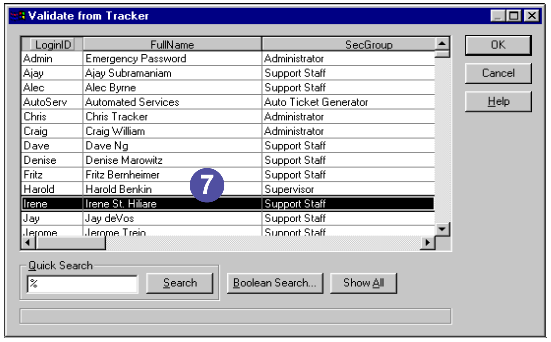
When the Insert button is active, you can use it to add information to the Call Record.

Update a Call Record

1. Select **Update Call**.
2. Click **OK**.
3. **Close** or **save** the Call Record when you are finished.
4. Select the **table** you want to modify.
5. Select a **field** for which you want to specify a value.
6. Click **Validate**, if available
7. Double-click a **data value**, if available.
8. Select an **overwrite option** from the field's drop-down box. **Yes** overwrites existing values. **No** writes values in blank fields.
9. Repeat steps 5-8 for each desired field.
10. Go to the next page.





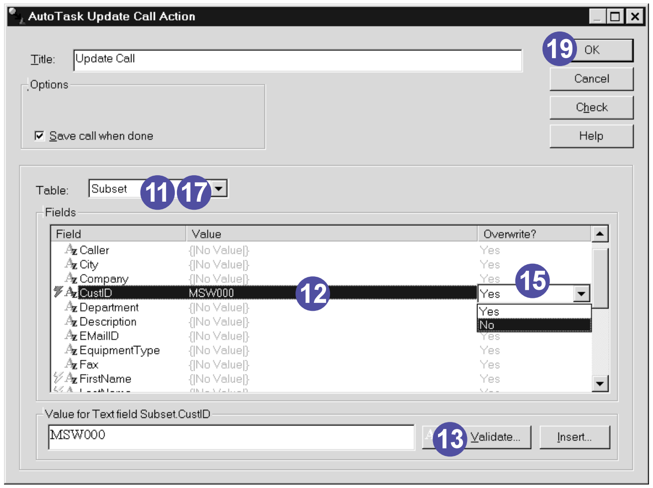


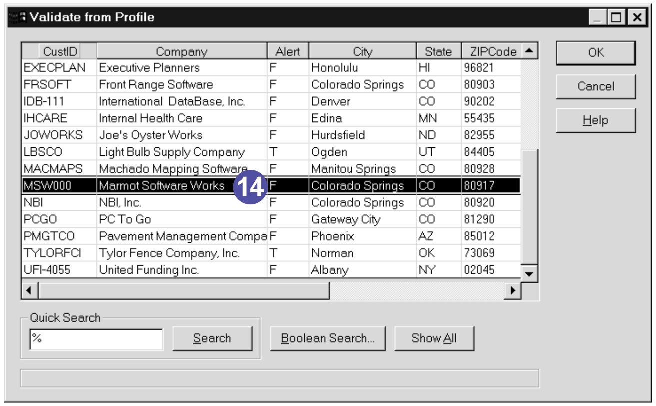
TIP

When the Insert button is active, you can use it to add information to the Call Record.

Update a Call Record

11. Select the **Subset** table.
12. Go to the first **field** for which you want to specify a value.
13. Click **Validate**, if available.
14. Double-click a **data value**, if available.
15. Select an **overwrite option** from the field's drop-down box. **Yes** overwrites existing values. **No** writes values in blank fields.
16. Repeat steps 12-15 for each desired field.
17. Select the **Detail**, **Assignment** or **Journal** table. Other options are available for Assignments and Journals.
18. Repeat steps 12-16 for any other fields you desire.
19. Click **OK**.





Editing Tasks and Actions

You can add more Actions to create a complex Task. A Task can contain a series of Actions. It performs each Action in order. The following scenarios illustrate AutoTask's power.

Follow-up Calls

You often schedule follow-up calls with your customers for a specific time frame, such as promising to call them after four hours. Define a four-hour alarm in AutoTask and associate the Task with a button on your toolbar. Include an activity log record so that each time you use the alarm, the Activity Log records the Action.

Form Letters

You can use a form letter to send a customer satisfaction survey to your customers. Design the letter with print options.

Remote Control

You use remote control software to take control of a customer's workstation for troubleshooting and repair. Track the IP address in the HEAT system and launch your remote control software with the proper arguments from the Call Logging screen. Track your use of remote control in the activity log, and you can report how many times you used remote control, and for which customers.

E-Mail

You often send similar e-mail messages to your customers, updating them on the status of their issues or giving them written solutions. Define the message to be sent, insert field data, send it to an e-mail ID from a customer profile, and have the activity log record when the message is sent. You can perform the entire Task with the touch of a button.

Paging

You often page your technicians to alert them to important issues. Use AutoTask with your server paging software tool to send the information they need. Have the activity log track when the page is sent.

Call Tickets

You need one type of printed Call Ticket to give to your internal technicians, and another type for a printed work order going to your vendor. Customize your output using Crystal Reports and associate it with a button on your toolbar.

Call Templates

Set up templates for calls that come in frequently, such as Password Change or Printer Jam.

Creating Complex Tasks

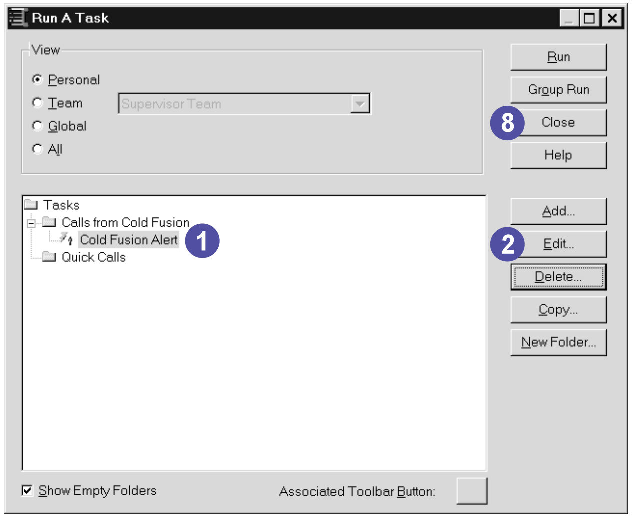
A complex Task contains two or more Actions. When you run the Task, it performs each of the Actions in serial order.

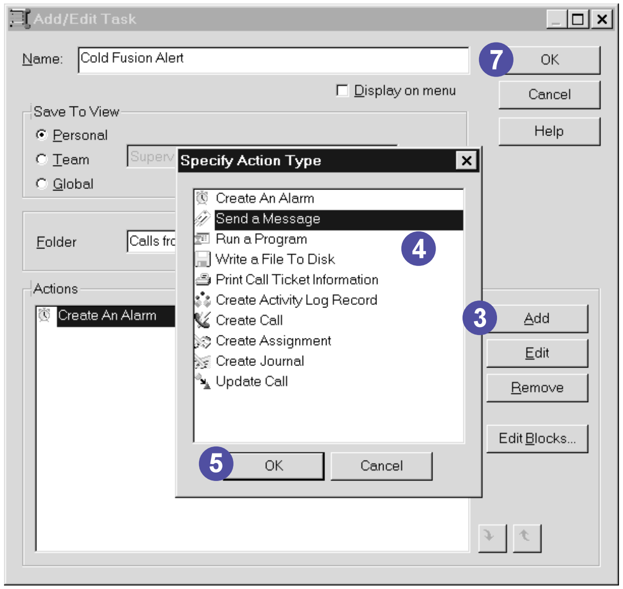
After you create a Task and add an Action, you can add another Action.

You can add many Actions to any Task.

Add an Action to a Task

1. Select a Task.
2. Click **Edit**.
3. Click **Add**.
4. Select an **Action**.
5. Click **OK**.
6. Repeat steps 2-5 for each action you want to add.
7. Click **OK**.
8. Click **Close**.



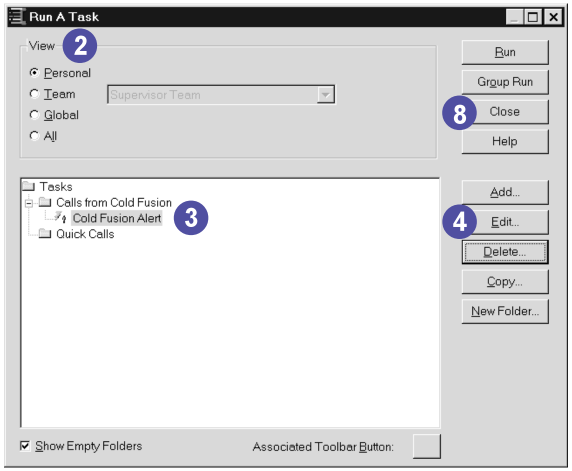


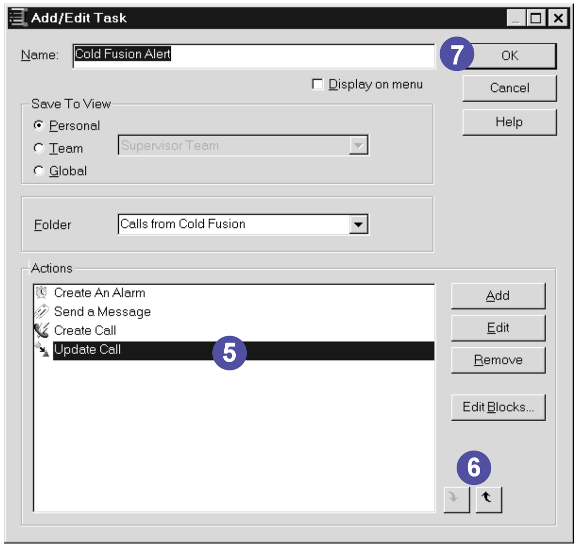
Changing Action Order

When you run a Task, it performs its Actions in the order they are listed in the Actions window. You can edit the order in which the Actions are performed.

Change Action Order

1. Select **Run/Edit a Task** from the **AutoTask** menu.
2. Select the **view** where the Task is saved.
3. Select the **Task**.
4. Click **Edit**.
5. Select the **Action** to be moved.
6. Click the **Up** or **Down** arrow to move the item up or down one level in the window.
7. Click **OK**.
8. Click **Close**.



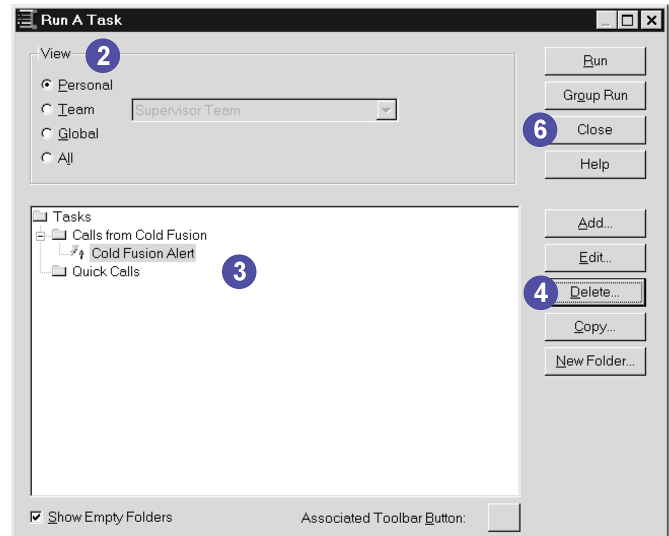


Removing Tasks

You can remove a Task from the Task List.

Remove a Task

1. Select **Run a Task** from the **AutoTask** menu.
2. Select the **view** where the Task is saved.
3. Select the **Task**.
4. Click **Delete**.
5. Click **OK**.
6. Click **Close**.



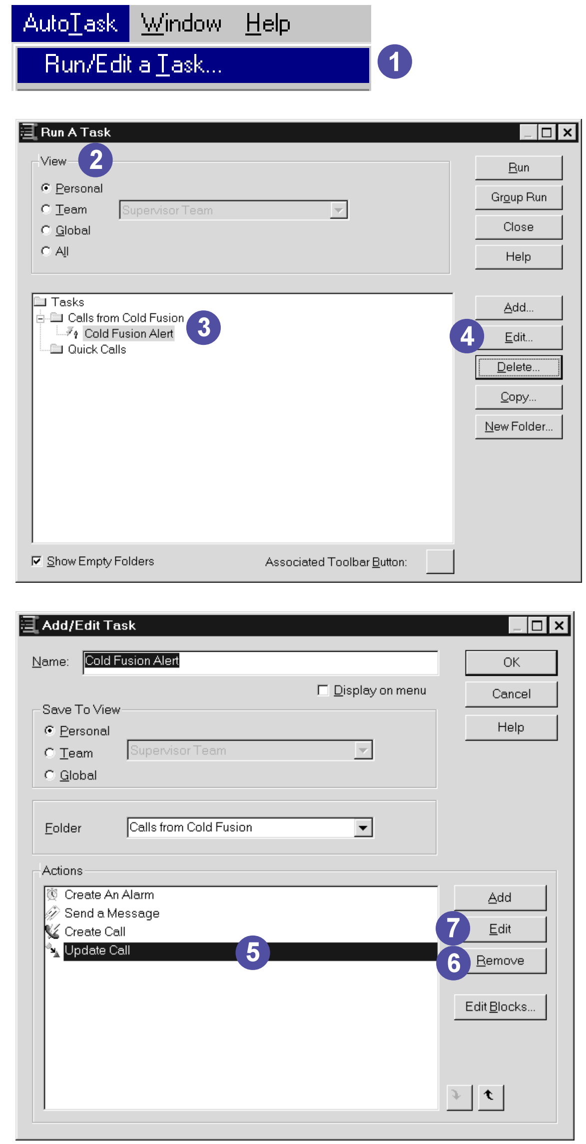
Editing Actions

You can edit an Action to change information or add new information.

You can also remove an Action.

Edit an Action

1. Select **Run/Edit a Task** from the **AutoTask** menu.
2. Select the **view** where the Task is saved.
3. Select the **Task** containing the Action to be edited.
4. Click **Edit**.
5. Select the **Action** to be edited.
6. To remove the Action, click **Remove**.
7. To edit the Action click **Edit**.
8. Go to next page.



SEE ALSO

Inserting Variables and Additional Information, in this chapter.

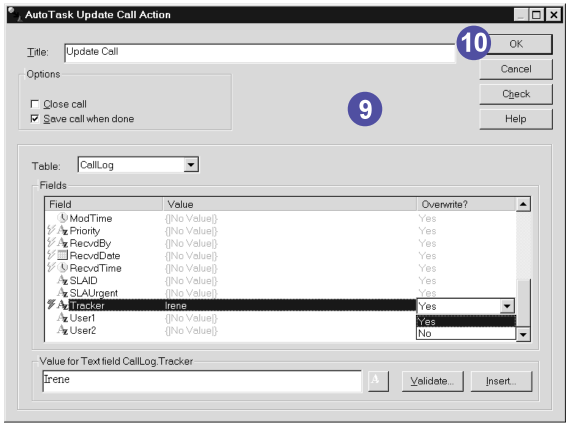
TIP

When the Insert button is active, you can use it to add information to the action.

Edit an Action

9 Edit the **Action.** (You can change any attribute in any field.)

10 Click **OK**.



Creating Toolbar Buttons to Run Tasks

You can create a toolbar button to run an AutoTask against the current Call Record.

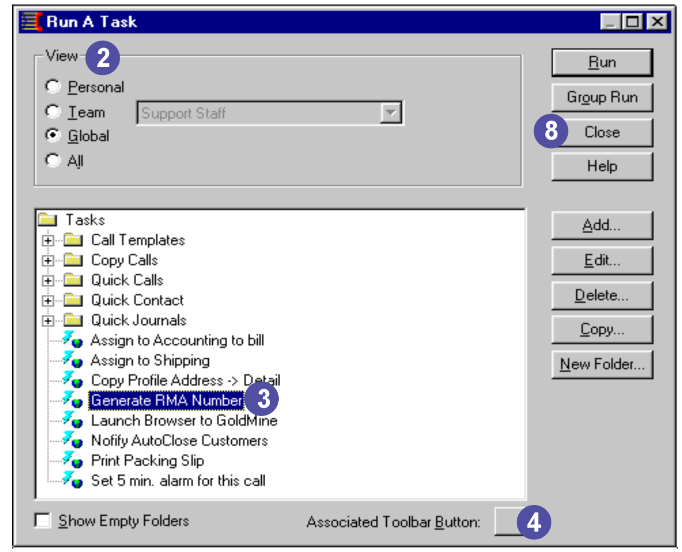
You can put the button on the toolbar or in the Update Tools collection. The Update Tools collection only adds the button to the Toolbar Customize window; it does not place the button on a toolbar. If you put the button in the Update Tools collection, you must select it from the Toolbar Customize window to put it on the toolbar.

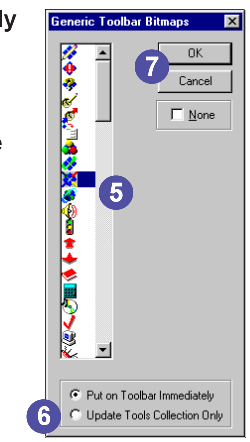
SEE ALSO

Customizing the Toolbar in "Call Logging," Chapter 2.

Create a Toolbar Button

1. Select **Run/Edit a Task** from the **AutoTask** menu.
2. Select the **view** where the Task is saved.
3. Browse through the **folders** to select the Task you want to put on the toolbar.
4. Click **Associated Toolbar Button**.
5. Select an **icon** to place on your toolbar button or click **None** to leave the toolbar button empty.
6. Select a toolbar option:
   - **Put on Toolbar Immediately** puts the button on the toolbar.
   - **Update Tools Collection Only** adds the button to the options in the **Toolbar Customize** window.
7. Click **OK**.
8. Click **Close**.



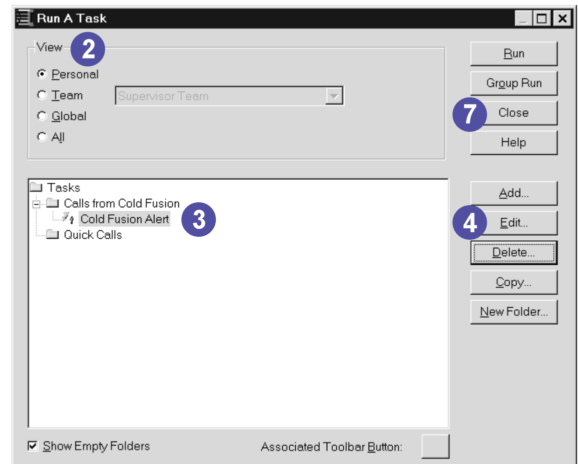


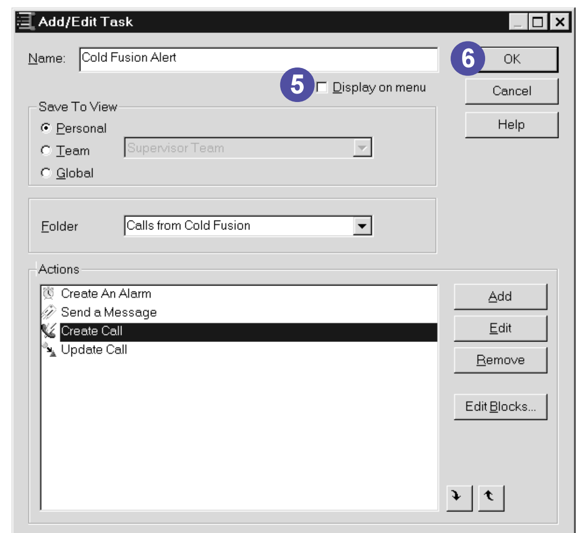
Creating Menu Items to Run Tasks

You can create a menu item that runs an AutoTask against the current Call Record.

Create a Menu Item

1. Select **Run/Edit a Task** from the **AutoTask** menu.
2. Select the **view** where the Task is saved.
3. Select the **Task** you want to put on the menu.
4. Click **Edit**.
5. Click **Display on Menu**.
6. Click **OK**.
7. Click **Close**.



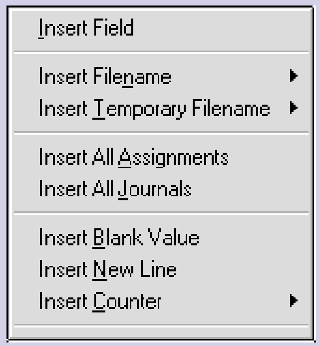


Inserting Variables and Additional Information into Actions

Several AutoTask windows have an Insert button which you can use to display the Insert menu. The button is unavailable until you activate certain fields, which differ from screen to screen. Use the Insert menu to add variables and additional information to an AutoTask Action.

Insert Button

Insert Menu



You can insert the following types of variables:

Field

The value of a field or an @function, such as the current date.

Filename

Inserts a file name variable, which will be replaced with a real file name.

Temporary Filename

Inserts a temporary file name, which will be replaced with a permanent file name.

All Assignments

Inserts all assignments from the Call Record.

All Journals

Inserts all journal entries from the Call Record.

Insert Blank Value

Inserts blank data to blank out empty fields. Be sure to set overwrite to Yes.

Insert New Line

Inserts a line break.

Insert Counter

Inserts an automatic number generator..

The procedures on the following pages show how to add each type of variable. Each procedure begins with the Insert menu.

Inserting Fields

Use Insert Field to add fields with variable information.

For example, you can set up a generic template to page assignees when calls are assigned to them. If your company has many assignees, any one of them can receive the message. If you insert a field in the template, the Action automatically pages the person listed as the assignee in the Call Record.

The Insert Field dialog box contains all table and field types in a Call Record, including Customer Profile data, and general functions for variables such as the current date.

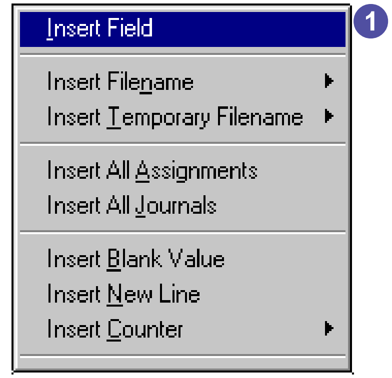
When running a task against a Call Group, you can elect to have information come from a master record (the currently selected Call Record of the current group) instead of the current Call Record.

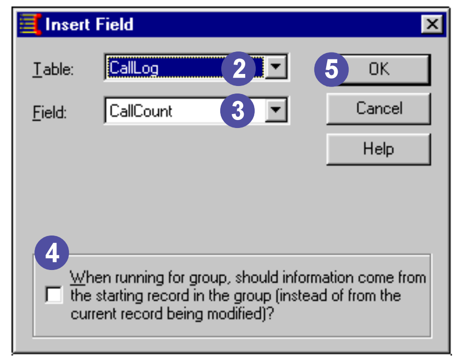
SEE ALSO

@Functions, in this chapter and in Appendix C.

Insert a Field

1. Select **Insert Field**.
2. Select a **Table**.
3. Select a **Field**. (If you select **@Function**, you may need to select a format or prompt. See next page.)
4. If you will run this task against a group, click the **check box** to use information from the group's starting record instead of the current Call Record.
5. Click **OK**. The table type and field type appear in the field.





Inserting @Functions

@Functions are fields that let you customize data based on variable criteria. For example, you can set up an AutoTask to insert the current date (see example).

Select from the following @Functions:

- @Current Date
- @Current Time
- @Prompt()
- @TrackerSupervisor
- @UserID()
- @DateAdjust()
- @DDERequest()
- @TimeAdjust()
- @ReadFile()

TRY THIS

Use the @TrackerSupervisor function to automatically notify a supervisor of an upcoming deadline.

TRY THIS

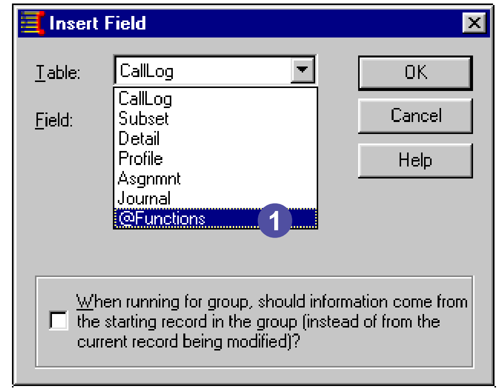
Use the @Prompt() function to automatically notify you of a call that needs updating.

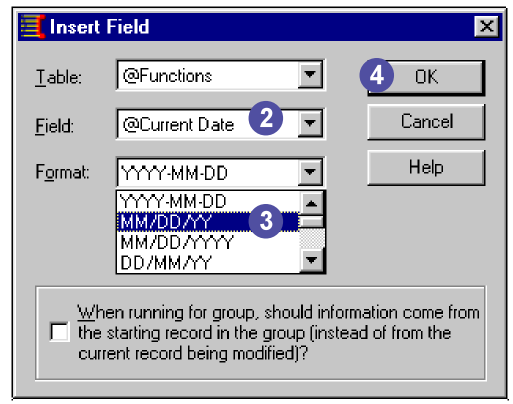
SEE ALSO

@Functions, Appendix C.

Format a Date Field

1. Select **@Functions** from the **Table** drop-down box.
2. Select **@Current Date** from the **Field** drop-down box.
3. Select a **date format** from the **Format** drop-down box.
4. Click **OK**.





Inserting File Names

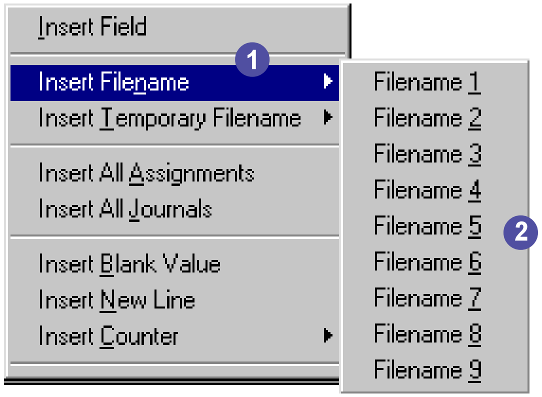
The Insert Filename feature is used to insert file names that are common within several Actions for an individual Task. For example, if you want to run a particular text file, you could set up the field as follows:

{|Filename1}.TXT

The file names are assigned by HEAT and are unique (for example, HFW1234, HFW 1235, etc.). The file names are stored locally and remain the same for all Actions within an AutoTask item.

Insert a File Name

1. Select **Insert Filename**.
2. Select a generic **file name** from the list.



Inserting Temporary File Names

You can use this feature when you run a program that requires a temporary file. For example, when you run the pager utility, assign a temporary file name to the message.

After the AutoTask item is run, the temporary file name is deleted. The temporary file name appears like this:

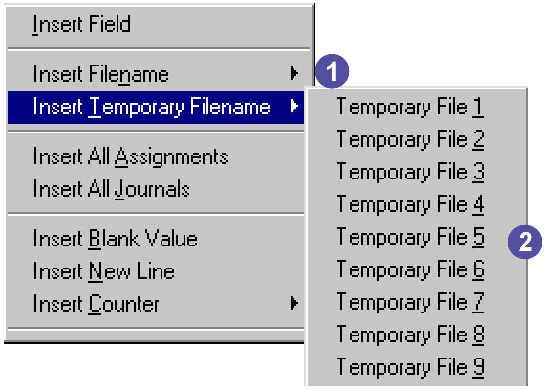
{|Temporary file1}

Temporary file names are unique and have full paths, such as:

C:\temp\hfw1237.tmp

Insert a Temporary File Name

1. Select **Insert Temporary Filename**.
2. Select a generic temporary **file name** from the list.



Inserting Assignments and Journals

Select Insert All Assignments to display the information for all Assignment records in a call. The field appears as:

{|All Assignments}

Select Insert All Journals to display the same information for all Journal records in a call. The field appears as:

{|All Journals}

TIP

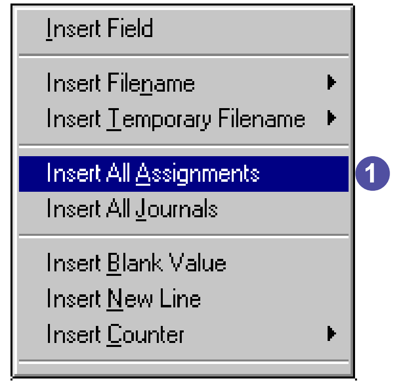
Before inserting Assignments or Journals, establish the format by clicking "Edit Blocks."

SEE ALSO

Editing Blocks, in this chapter.

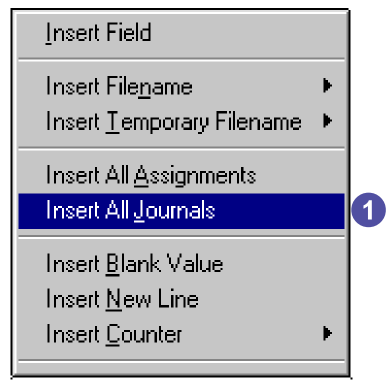
Insert All Assignments

1. Click **Insert All Assignments**. The **All Assignments** expression appears in the selected field.



Insert All Journals

1. Click **Insert All Journals**. The **All Journals** expression appears in the selected field.

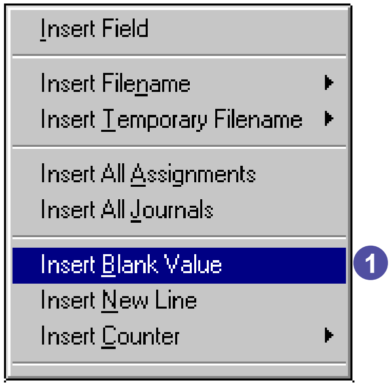


Inserting Blank Values

Select Insert Blank Values to overwrite empty fields with blank data. Be sure to set the overwrite option to Yes in the Specify Action dialog box.

Insert Blank Value

1. Click **Insert Blank Value**.

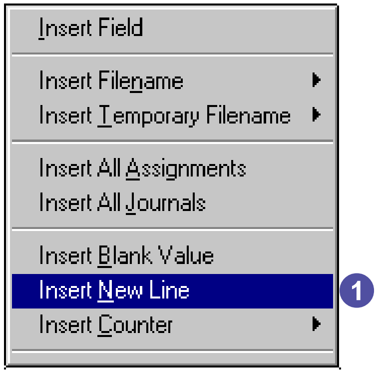


Inserting New Lines

Select Insert New Line to insert a line break in the body of text.

Insert New Line

1. Click **Insert New Line**. A line break appears in the selected field.



Inserting Counters

Select Insert Counter to automate number generation. For example, use a counter to automatically generate an RMA number in a Quick Call.

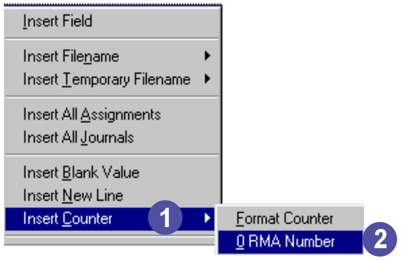
Counters are set up by your system administrator. Your ability to modify counters is based on your security role, but you can modify some parameters within Call Logging.

SEE ALSO

Formatting Counters, in this chapter.

Insert Counter

1. Click **Insert Counter**.
2. Select a **counter** (an RMA counter is used in this example).



Formatting Counters

You can format counters to display numbers differently.

Your ability to modify counters is based on your security role.

TIP

Use "Increment the number when used" option to prevent a number from being used twice.

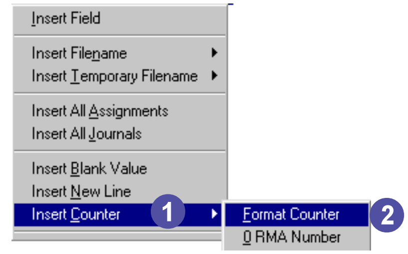
TIP

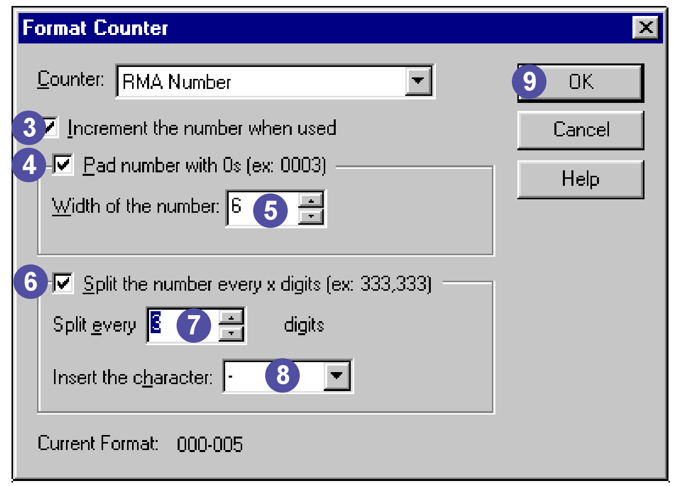
Use a splitting character such as a hyphen to break up a long number.

For example, 123456 becomes 123-456.

Format Counter

1. Click **Insert Counter.**
2. Select **Format Counter**. The Format Counter dialog box appears.
3. Click **Increment the number** when used to automatically increment the number after it has been used.
4. Click **Pad number with 0s** to place 0s before the number.
5. Select the total **width** of the number. (For example, if you choose 6 as the width of the number, the generated number will be a total of 6 digits.)
6. Click **Split the number every x** digits to insert a character between digits.
7. Select a splitting **number.**
8. Select the splitting **character**.
9. Click **OK**.



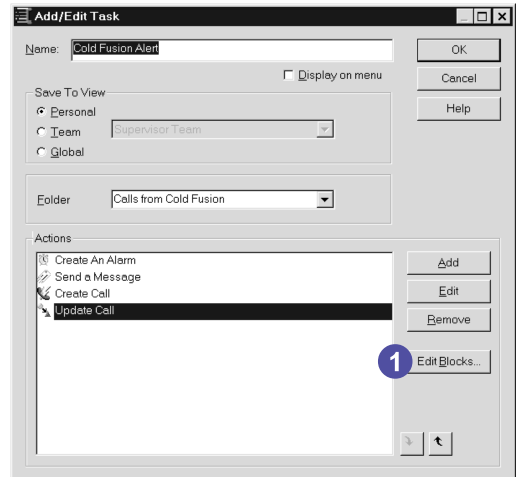


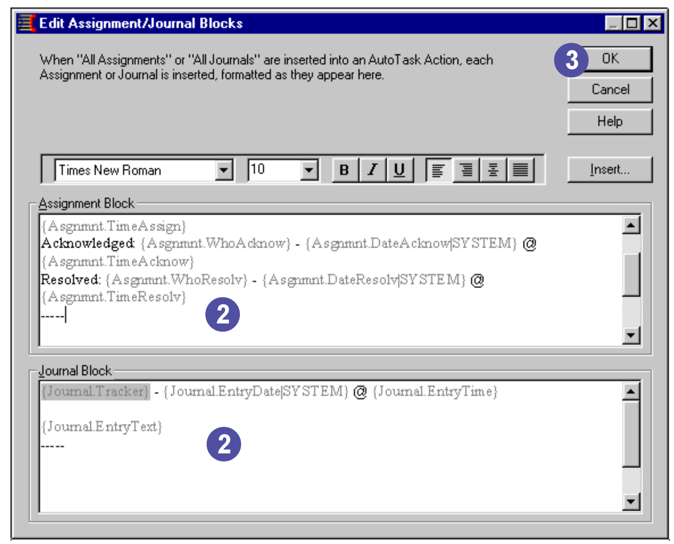
Editing Blocks

Use the Edit Blocks to specify the text and formatting of All Assignments and All Journals. You can change formatting preferences, edit text, insert fields, and change alignment.

Edit a Block

1. Click **Edit Blocks**.
2. Type **text** or insert **variables** in the **Assignment Block** or **Journal Block**.
3. Click **OK**.





9

Sharing Information

IN THIS CHAPTER

HEAT contains numerous ways to share information. Alert Monitor lets you set up alerts to notify you each time you get a call or assignment. SupportMail lets you exchange information with other support center workers.

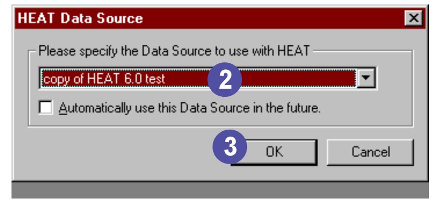
- **Alert Monitor —** Tell Alert Monitor when, where, and how to alert you and others about new calls or assignments.
- **SupportMail —** Exchange e-mail messages with others on internal or external mail systems. You can also send broadcast messages to everyone on your mail system.

Logging on to Alert Monitor

You can start Alert Monitor from a desktop icon or from the Start menu.

Log on to Alert Monitor

1. Select **Programs>> HEAT>>Alert Monitor** from the Start button.
2. Select the **data source** from the drop-down list.
3. Click **OK**.
4. Enter your **User ID** and **Password**.
5. Click **OK**. The start-up menu appears.



Using the Startup Menu

Alert Monitor's start-up menu displays the module components, explains their purpose, and lets you access them quickly.

You can enable and disable the startup menu.

Run an Alert Monitor Task

1. Highlight a **task**. An explanation of the task appears in the text pane.
2. Click **OK** to run the highlighted task.

Show or Hide the Start Menu

1. To hide the start menu, click **Do not show this start-up menu again**.
2. Click **Close**.
3. To display the start menu, click the **Start Menu** icon.

Defining Call Group Alerts

Alert Monitor can notify you when certain events occur in selected Call Groups. The first setup step is to define these Call Groups and the events to which you or others will be alerted.

Alert Monitor can notify you when it detects:

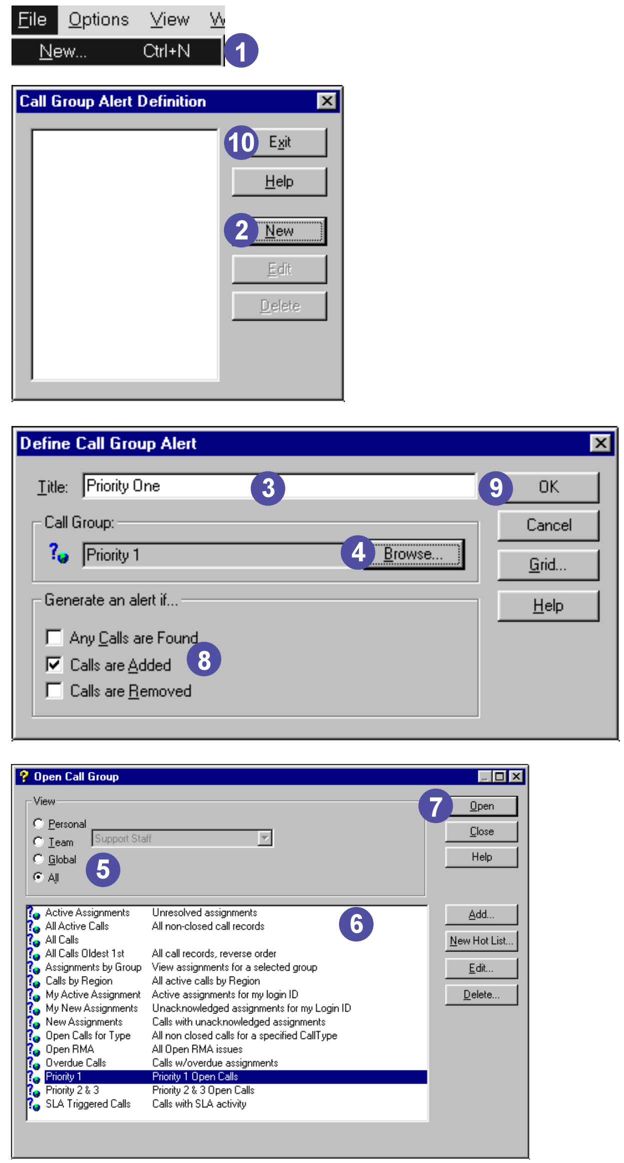
- A new call assigned to you or your group.
- A new SupportMail, or VIM or MAPI e-mail.
- An alarm is tripped.

SEE ALSO

Creating a New Call Group in "Call Groups," Chapter 4.

Define a Call Group Alert

1. Select **New** from the **File** menu.
2. Click **New**.
3. Type a **title** for this new Call Group Alert. The default title is the call group name.
4. Click **Browse**.
5. Select the **view** where the Call Group is stored.
6. Select the **Call Group**.
7. Click **Open**.
8. Select the conditions that you want to be notified of:
   - **Any calls are Found** in the selected Call Group.
   - Any **Calls are Added** to the selected Call Group.
   - Any **Calls are Removed** from the selected Call Group.
9. Click **OK**.
10. Click **Exit**. The new Call Group Alert appears in the Alert Monitor window.



Defining What Alert Monitor Does

The second setup step is to define what Alert Monitor does when your selected events occur in your selected Call Group.

You can receive notification of events when you are at, or away from, your desk.

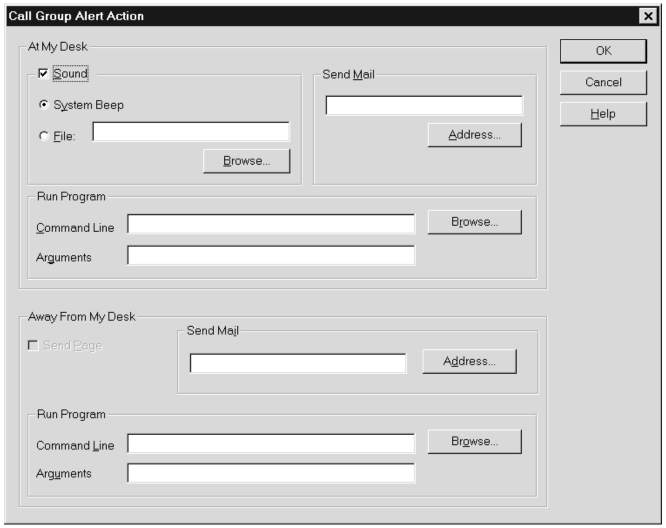
Alert Monitor can send a message to a computer or pager. It can:

- Sound an alert on a computer running Alert Monitor.
- Send an e-mail message.
- Page someone using third-party paging software.

Go to the Call Group Alert Action Screen

1. From the Call Group Definition Window, select **Define>>Call Group Alert Action**. The **Call Group Alert Action** screen appears.

Note: The procedures on the next four pages show how to fill in this screen.

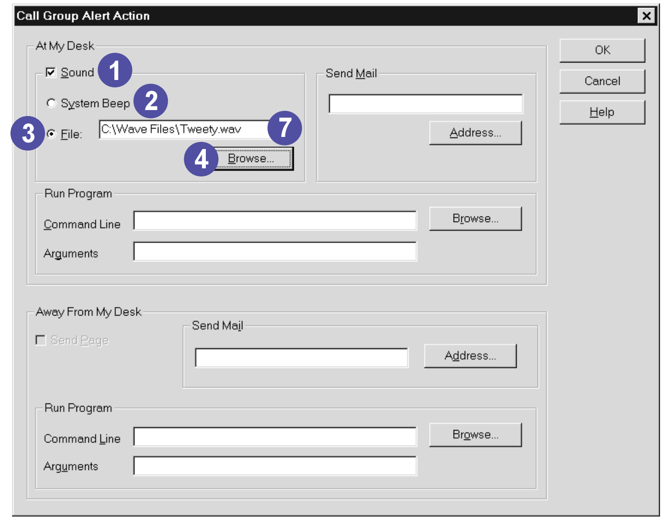


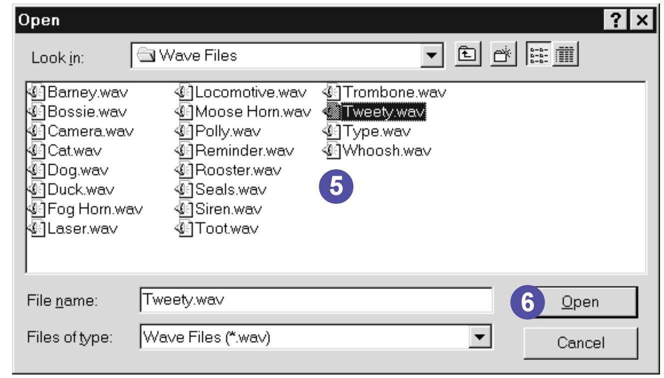
TIP

If you have a sound card, select a unique sound file, so you will know the message is from Alert Monitor.

Set up Alert Monitor to Make a Sound on Your Computer

1. Click the **Sound** check box.
2. To produce a system beep, click the **System Beep** radio button.
3. To produce another sound, click the **File** radio button.
4. Click **Browse**.
5. Select a **.wav** file.
6. Click **Open**.
7. The **.wav** file appears in the **File** field.





TIP

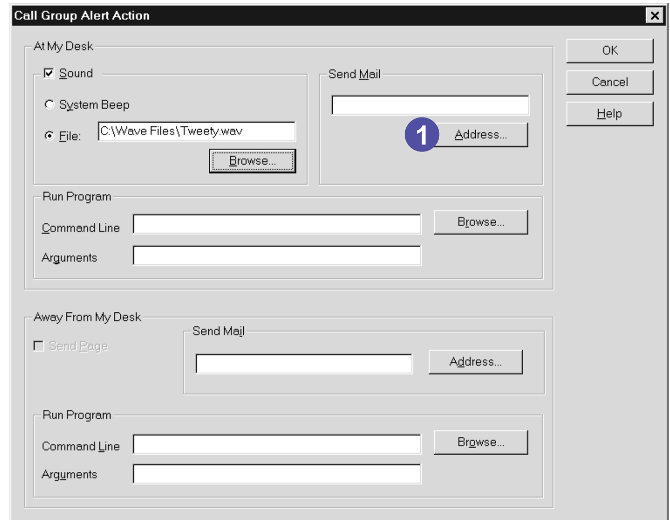
Be sure to set your e-mail program to alert you when new e-mail arrives.

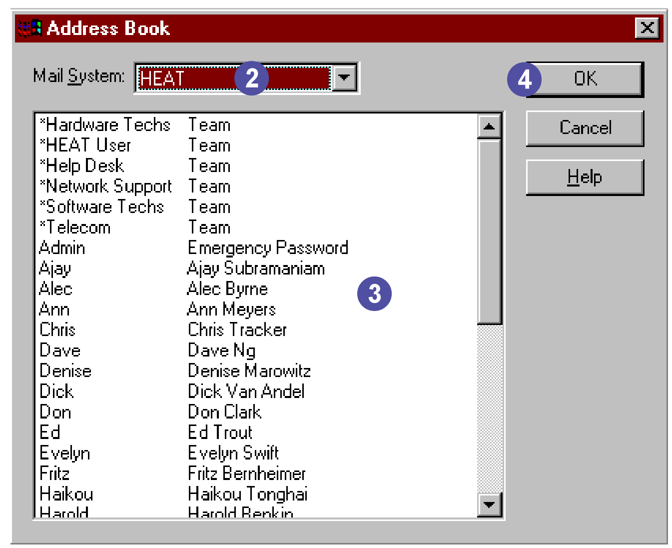
SEE ALSO

Setting Up External E-mail in "User Preferences," Chapter 10.

Set up Alert Monitor to Send an E-Mail Message to Your Computer

1. Click **Address**.
2. Select a **mail system** from the **Mail System** drop-down box.
3. Click your **name**.
4. Click **OK**.



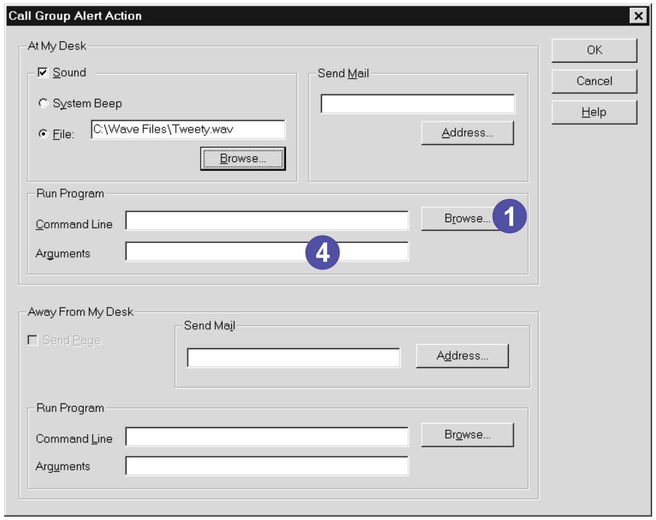


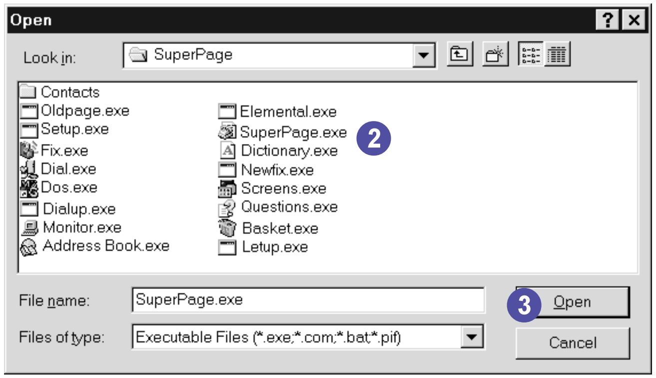
SEE ALSO

Sending a Page, in this chapter.

Set up Alert Monitor to Run a Program on Your Computer

1. Click **Browse**.
2. Select an executable **file** to launch as an alert. For example, you can launch your paging utility.
3. Click **Open**.
4. Define **arguments** to pass to the program in the command line. For example, you can enter your pager number.



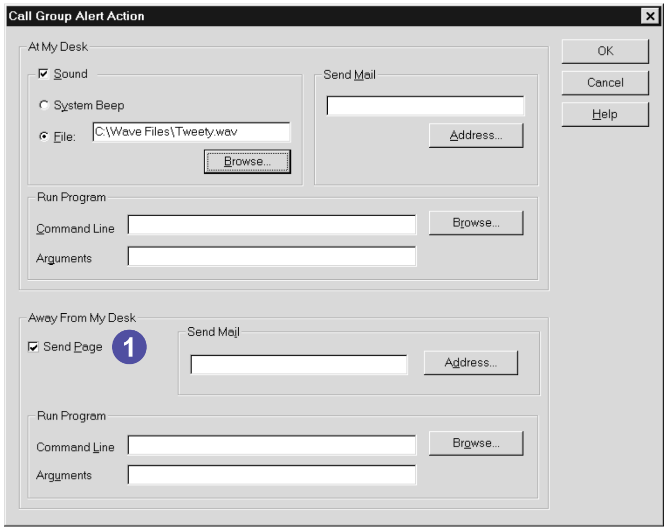


SEE ALSO

Sending a Page, in this chapter and "User Preferences," Chapter 10.

Set up Alert Monitor to Page You

1. Click the **Send Page** check box. Note that the **Send Page** check box is enabled only if you have previously defined the paging command line in the User Preferences dialog box.

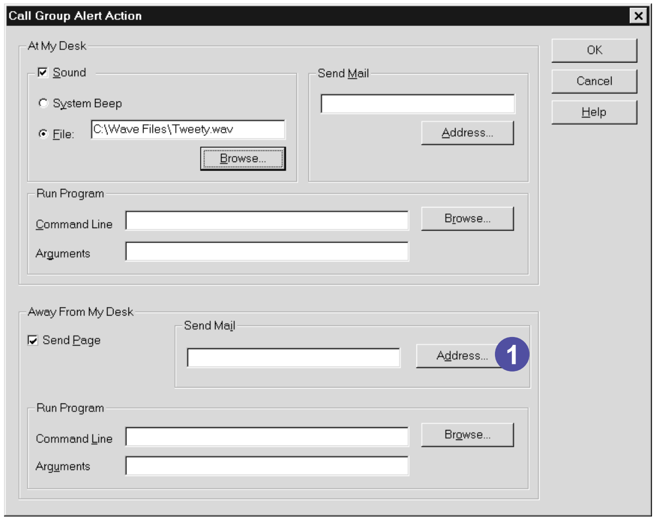


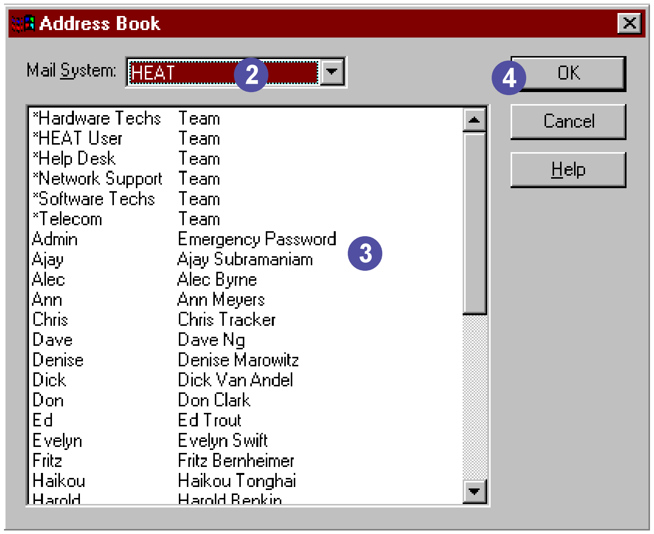
SEE ALSO

Sending a Page, in this chapter.

Set up Alert Monitor to Send an E-Mail Message to a Pager

1. Click **Address**.
2. Select a mail system from the **Mail System** drop-down box.
3. Click the **name** of the person to be paged.
4. Click **OK**.



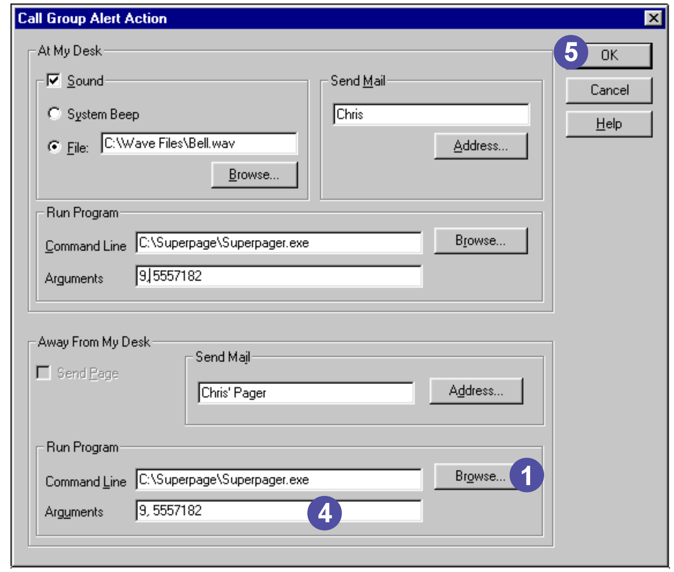


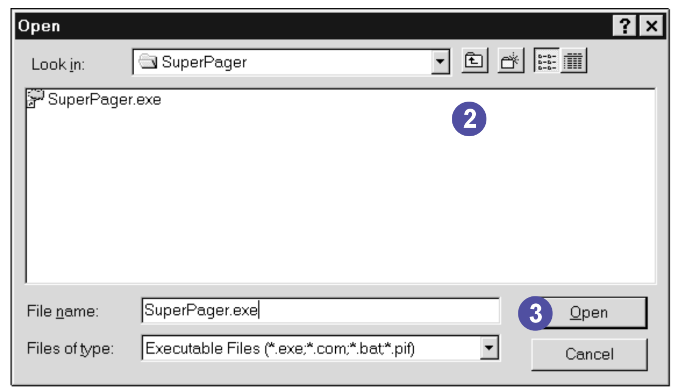
SEE ALSO

Sending a Page, in this chapter.

Set up Alert Monitor to run a Program as an Alert

1. Click **Browse**.
2. Select an executable **file** to launch as an alert. For example, you can launch your paging utility.
3. Click **Open**.
4. Define **arguments** to pass to the program in the command line. For example, you can enter your pager number.
5. Click **OK**.



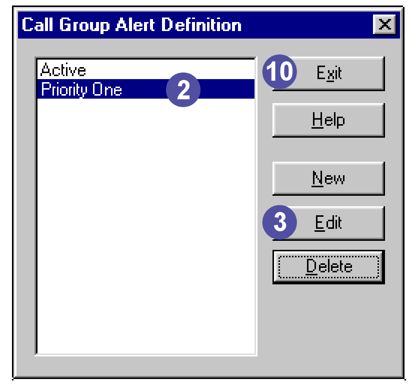


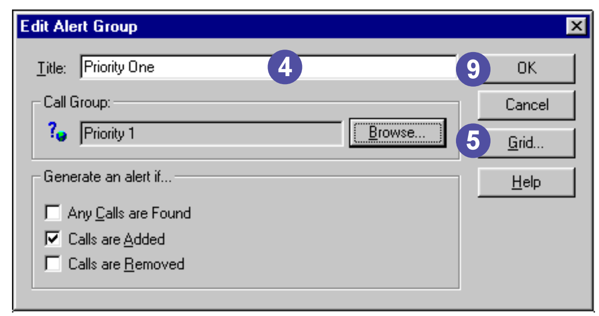
Editing Call Group Alert Definitions

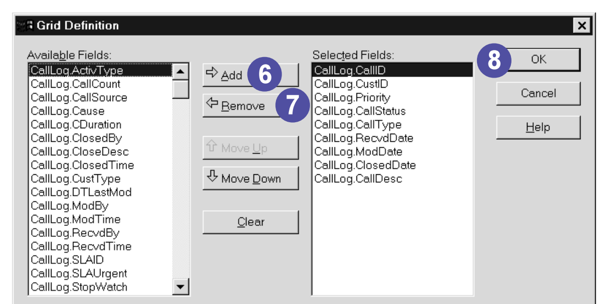
You can edit the attributes of a Call Group Alert Definition.

Edit a Call Group Alert Definition

1. Select **Call Group Alerts** from the **Define** menu.
2. Select a **Call Group Alert Definition.**
3. Click **Edit**.
4. Edit the **attributes** of the Call Group Alert Definition.
5. To modify the fields in grid view, click **Grid**.
6. To move an available field to the list of selected fields, highlight the field and click **Add**.
7. To remove a selected field from the list of selected fields, highlight the field and click **Remove**.
8. Click **OK**.
9. Click **OK**.
10. Click **Exit**.







Deleting Call Group Alerts from the List

You can delete a Call Group from the Alert Definition list.

Delete a Call Group Alert from the List

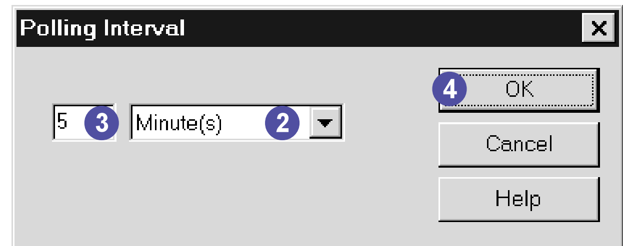
1. Select a **Call Group**.
2. Click **Delete**.
3. Click **Yes**.
4. Click **Exit**.

Defining How Often Alert Monitor Checks for Calls

The polling interval determines how often Alert Monitor checks the database for Call Group or messaging changes.

Define the Polling Interval

1. Select **Polling Interval** from the **Define** menu.
2. Select the **type of interval** (in minutes or hours) from the drop-down box.
3. Enter the **numerical interval** in the number field.
4. Click **OK**.



Starting and Stopping Polling

When you have set up Alert Monitor, you can start polling the database for alert messages. When you start polling, HEAT waits for the prescribed polling interval, then polls the database.

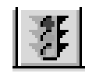
You can also poll the database on command.

SEE ALSO

Defining How Often Alert Monitor Checks for Calls, in this chapter.

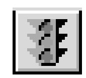
Start Polling

1. Select **Start** from the **Options** menu. A green light on the signal icon means that polling is active.



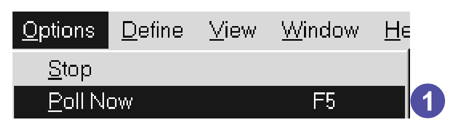
Stop Polling

1. Select **Stop** from the **Options** menu. A red light on the signal icon means that Alert Monitor is not polling.



Poll Now

1. Select **Poll Now** from the **Options** menu.

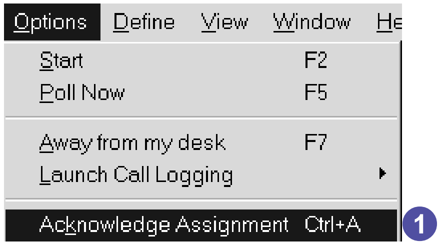


Acknowledging Alert Monitor Assignments

You can acknowledge an assignment while running Alert Monitor. The control is enabled only if an assignment exists.

Acknowledge an Assignment

1. When Alert Monitor announces a new assignment, select **Acknowledge Assignment** from the **Options** menu.



Telling Alert Monitor When You are Away From Your Desk

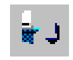
When you set up Alert Monitor, you defined how you will be notified of alerts, both at and away from your desk. With this procedure, you can tell Alert Monitor when you are at or away from your desk.

SEE ALSO

Defining what Alert Monitor Does, in this chapter.

Tell Alert Monitor You are away from Your Desk

1. Select **Away from my desk** from the **Options** menu. The **Away from My Desk** icon shows an empty desk.



Tell Alert Monitor You are back at Your Desk

1. Select **Away from my desk** from the **Options** menu. The **At My Desk** icon shows a person at the desk.

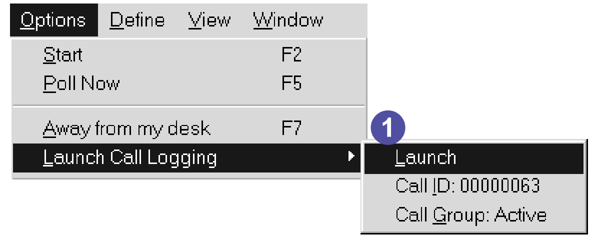
Launching Call Logging from Alert Monitor

From Alert Monitor, you can launch Call Logging in one of three modes:

- **Launch Call Logging** launches Call Logging.
- **Launch Call Logging for Call ID** launches Call Logging open to the Call Record currently selected in the Alert Monitor window.
- **Launch Call Logging for Call Group** launches Call Logging open to the Call Group of the Call Record currently selected in the Alert Monitor window.

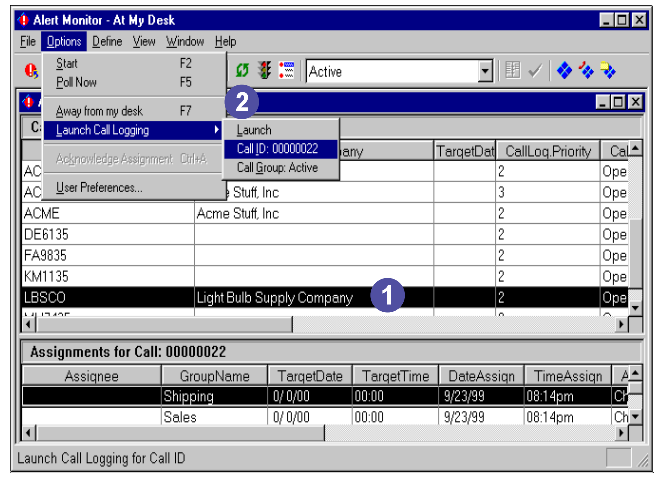
Launch Call Logging

1. Select **Launch Call Logging>>Launch** from the **Options** menu.



Launch Call Logging Open to the Current Call Record

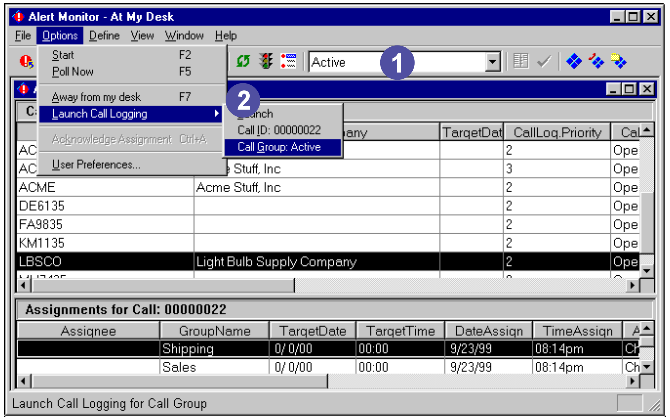
1. Select the **Call Record** you want to view from a **Call Group Details** window.
2. Select **Launch Call Logging>>Call ID** from the **Options** menu.



TIP

This procedure launches Call Logging with the highlighted Call Record displayed.

Launch Call Logging Open to a Call Group



1. Select the **Call Group** you want to view from the drop-down box.

2. Select **Launch Call Logging>> Call Group:** from the **Options** menu.

Saving Alert Monitor Definitions

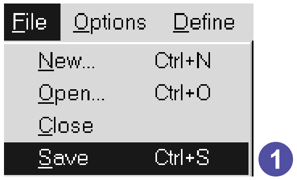
You can save Alert Monitor definition settings as separate files. This lets you have your own Alert Monitor definitions.

You can save multiple definition files. For example, you may have one set of call groups to monitor during the week and another set on the weekend.

Alert Monitor saves the file with the extension .alr.

Save Alert Monitor Definitions

1. Select **Save** from the **File** menu.
2. Type a **file name** in the **File name** field.
3. Click **Save**.



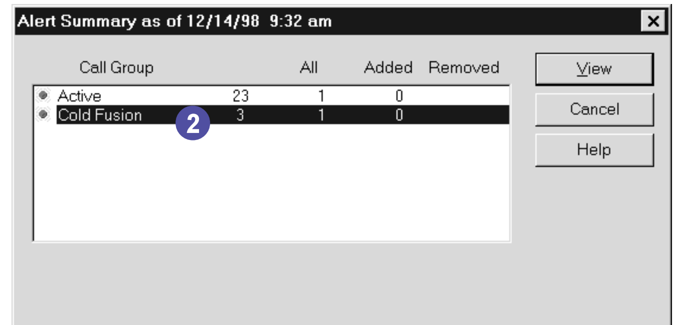
Viewing Alert Summaries and Details

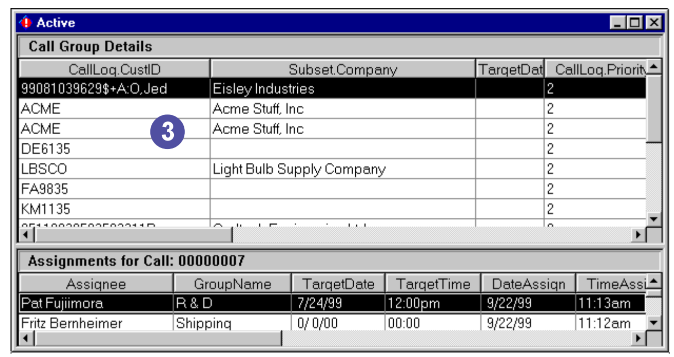
After a poll you can view the Alert Summary. The Alert Summary shows each Call Group and the number of alerts generated, added, and removed. A red bell icon appears for a current alert.

Each Call Group Details window displays the selected Call Group and all Call Records that meet the alert criteria. It displays all calls in the call group regardless of which ones tripped the alert.

View the Alert Summary and Details

1. Select **Alert Summary** from the **View** menu.
2. To view a Call Group's details, double-click the **Call Group.**
3. To view a Call Record in Call Logging, double-click the **Call Record**.





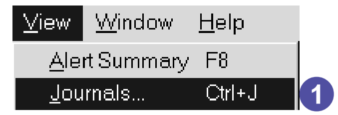
Viewing Lists of Journal Entries

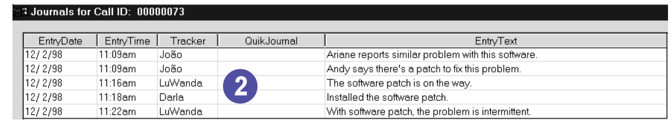
You can view a list of all Journal entries associated with a Call Record.

View a Call Record's Journal Entries

1. Select **Journals** from the **View** menu. A list of Journal entries for that Call Record appears.

2. Select the **Call Record** from the list of **Call Group Details**.





Setting Alerts for SupportMail

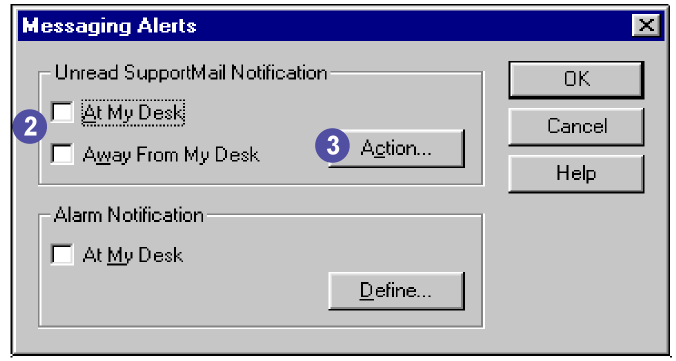
You can specify how Alert Monitor notifies you of SupportMail messages.

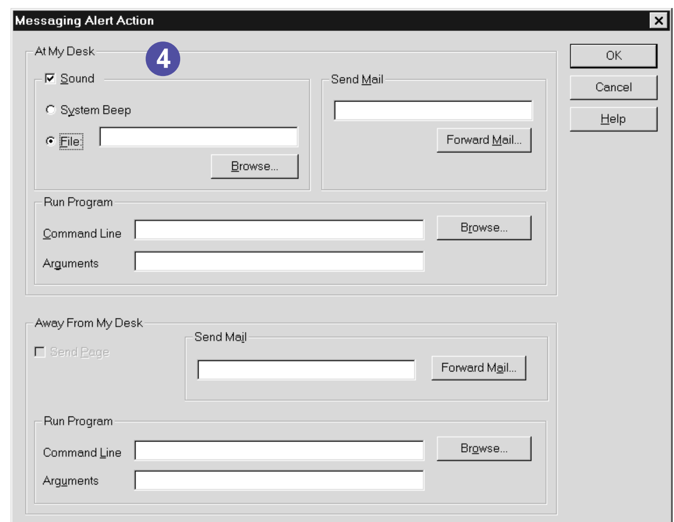
SEE ALSO

Defining What Alert Monitor Does, in this Chapter.

Set Unread SupportMail Notification

1. Select **System Message Alerts** from the **Define** menu.
2. To be notified of new SupportMail messages when you are at your desk, click the **At My Desk** check box. To be notified of new SupportMail messages when you are away from your desk, click the **Away From My Desk** check box.
3. Click **Action.**
4. Fill out this form as shown in **Defining What Alert Monitor Does**, in this chapter.





TIP

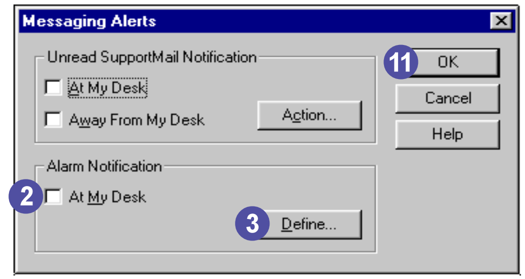
You may have alarms defined in Call Logging. You may use this procedure to add or edit them.

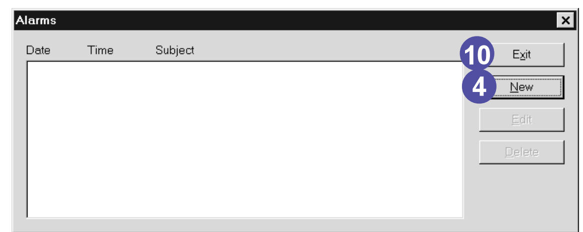
SEE ALSO

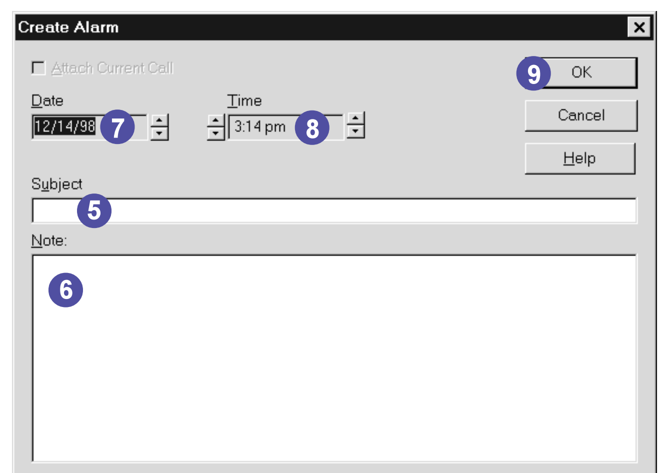
Defining what Alert Monitor Does, in this chapter.

Set Alarm Notification

1. Select **System Message Alerts** from the **Define** menu.
2. Click **At My Desk**.
3. Click **Define**.
4. Click **New**.
5. Type a **subject**.
6. Type a descriptive **note**.
7. In the **Date** field, click the up or down **arrows** to increase or decrease the alarm date by one day.
8. In the **Time** field, click the up or down arrows to increase or decrease the alarm time by one minute.
9. Click **OK**.
10. Click **Exit**.
11. Click **OK**.







Setting User Preferences for Message Alerts

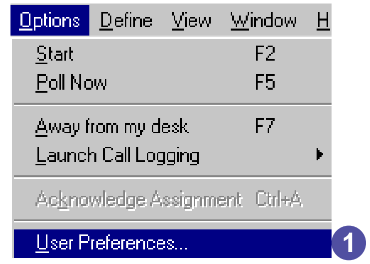
You can select the means of alert notification.

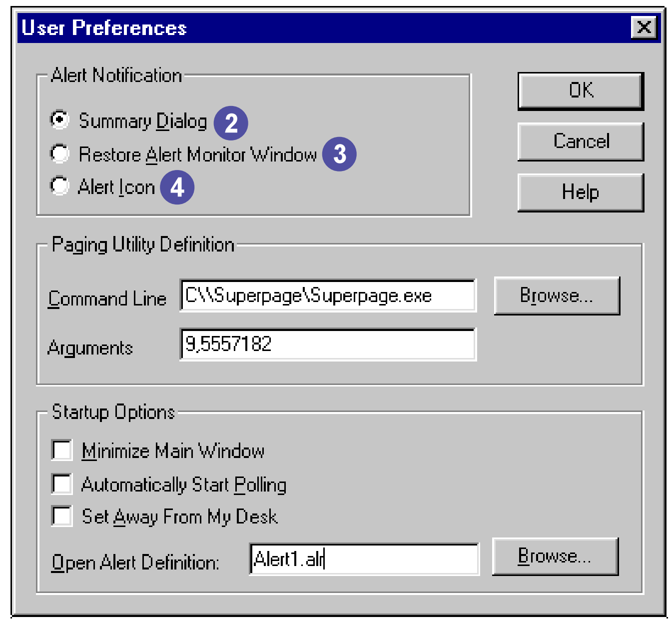
If you will use Alert Monitor to dial your pager, set the pager command line here.

Set the options for Alert Monitor at start-up.

Set Alert Notification

1. Select **User Preferences** from the **Options** menu.
2. To display the **Alert Summary** dialog box as an alert, click the **Summary Dialog** button.
3. To display the **Alert Monitor** window as an alert, click the **Restore Alert Monitor Window** button.
4. To display the **Alert Monitor** button in the taskbar, click the **Alert Icon** button.



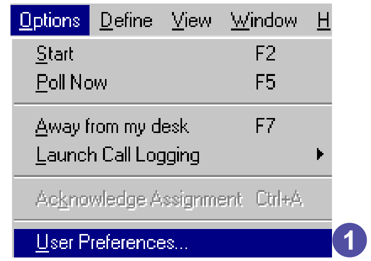


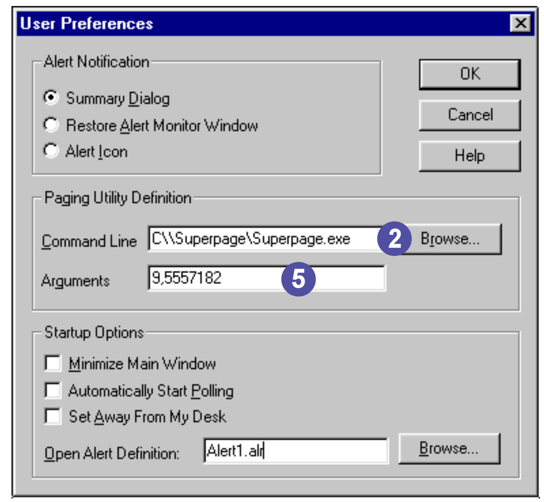
SEE ALSO

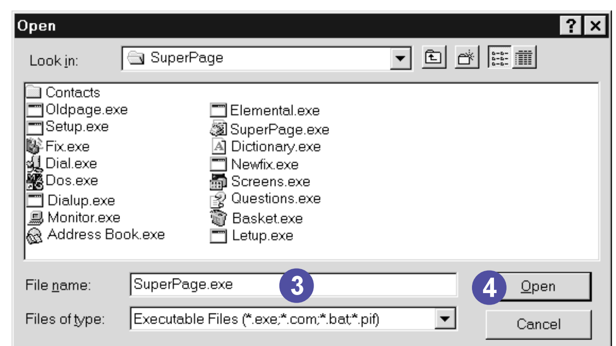
Set up Alert Monitor to Run a Program on Your Computer, in this chapter.

Specify Paging Utility

1. Select **User Preferences** from the **Options** menu.
2. Click **Browse**.
3. Select your paging utility's **executable file**.
4. Click **Open**.
5. Enter your **pager number**, or any other necessary conditions for launch, in the **Arguments** field.





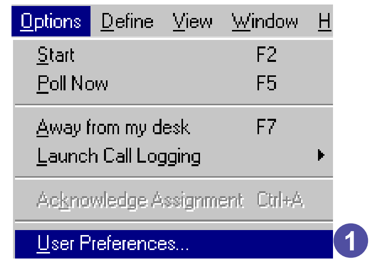


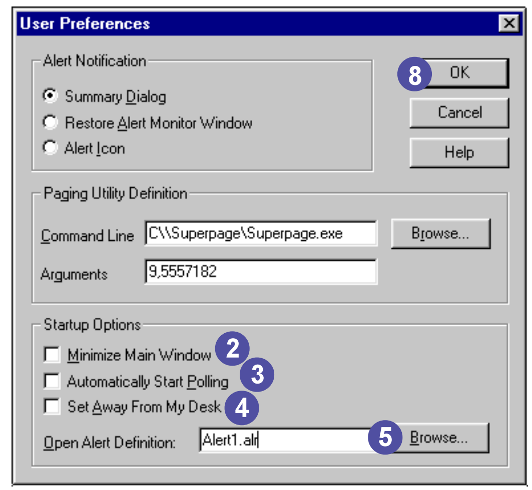
SEE ALSO

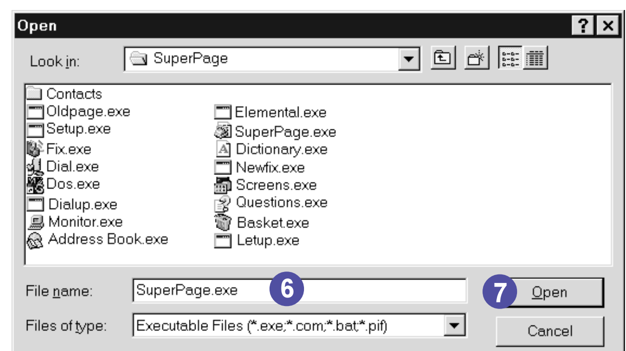
Starting and Stopping Polling, in this chapter.

Set Start-up Options

1. Select **User Preferences** from the **Options** menu.
2. To start Alert Monitor in minimized mode, click the **Minimize Main Window** check box.
3. To begin checking for alerts without a manual start, click the **Automatically Start Polling** check box.
4. If you will be away from your desk at start-up, click the **Set Away From My Desk** check box.
5. To open an alert definition at start-up, click **Browse**.
6. Select an **alert definition**.
7. Click **Open**.
8. Click **OK**.



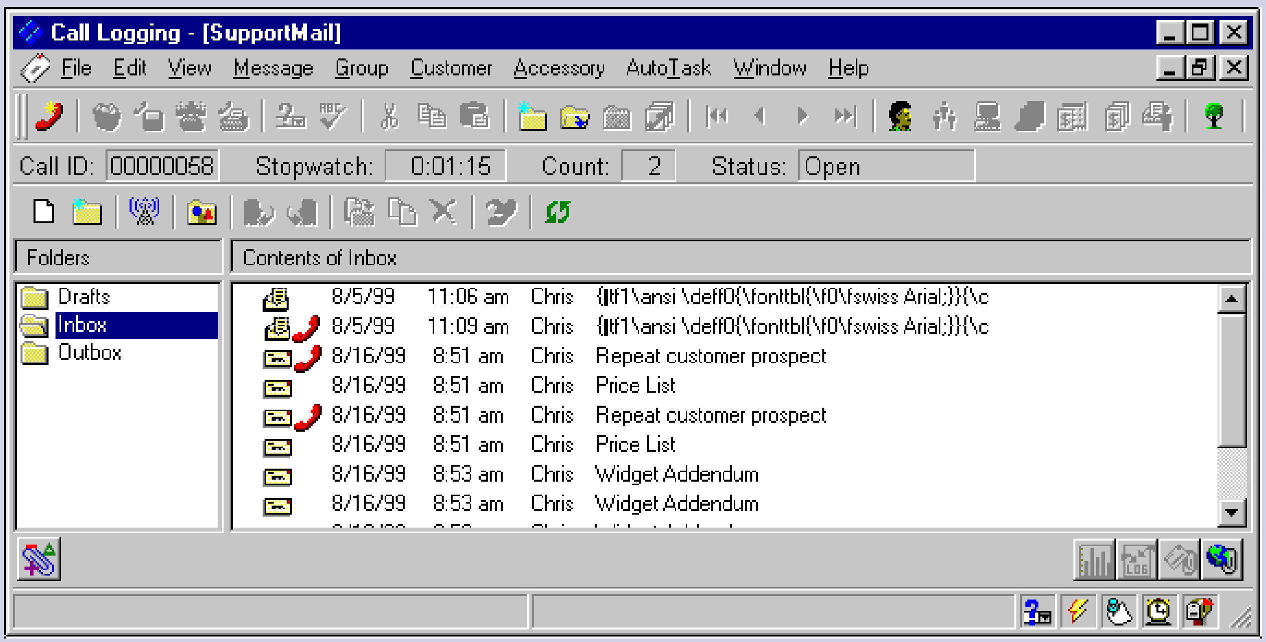




SupportMail

SupportMail is HEAT's e-mail system. You can use it to exchange e-mail with other HEAT users. You can also use it to send and receive external e-mail messages.

You can store sent and received messages in special folders. You can also send a broadcast message to every person on your mail system.



Starting SupportMail

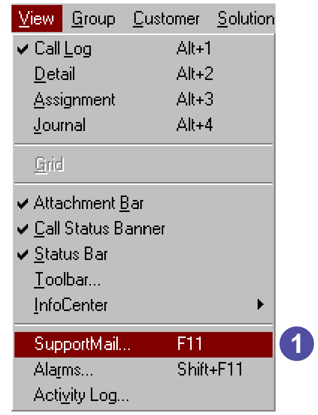
When you start SupportMail, the screen displays the messages in your in box. A closed envelope icon identifies an unread message. An open envelope icon identifies a read message. A telephone icon identifies a message with a Call Record attached.

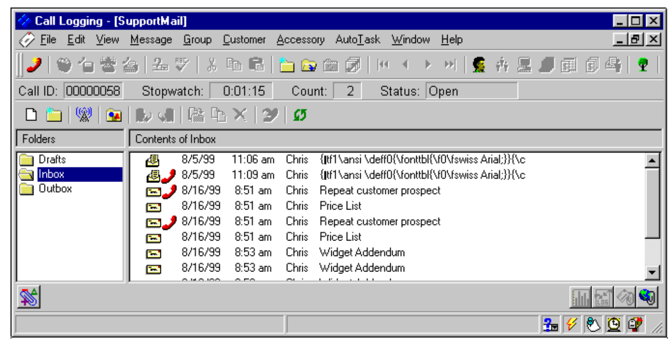
TIP

Add a SupportMail button  *to your toolbar for easy launching. See Customizing Toolbars in "Call Logging," Chapter 2.*

Start SupportMail

1. Select **SupportMail** from the **View** menu. The SupportMail screen appears.





Viewing E-Mail Messages

Your messages can come from coworkers or from automated tools like the Business Process Automation module. You can also receive messages from external e-mail sources.

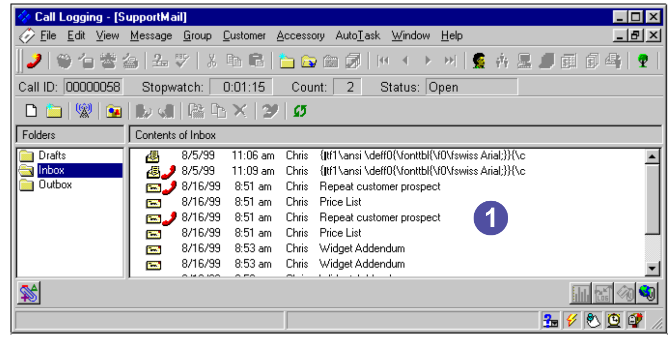
Your system administrator controls rights to send and receive external messages.

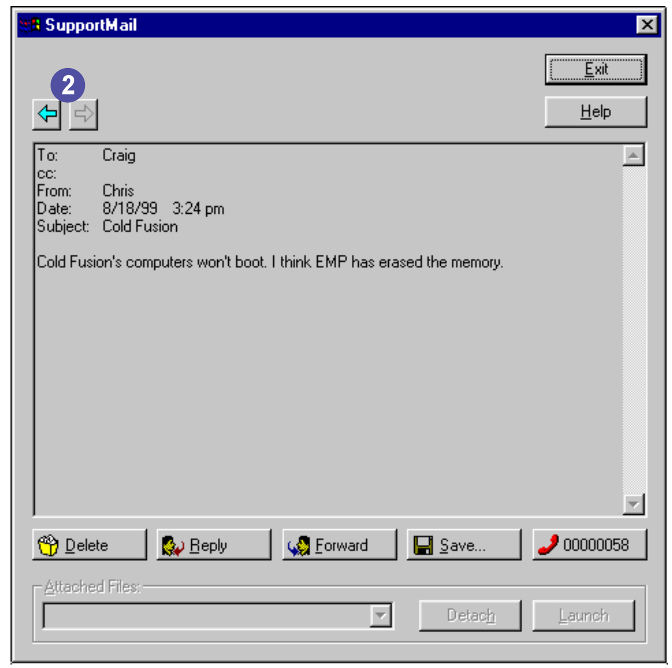
SEE ALSO

Setting Alerts for SupportMail, in this chapter.

View an E-Mail Message

1. Double-click an **e-mail message.**
2. Click the **Previous or Next arrow buttons** to view other messages.





Saving and Deleting E-Mail Messages

You can save and delete e-mail messages.

Save an E-Mail Message

1. Click **Save**. The message is saved.

Delete an E-Mail Message

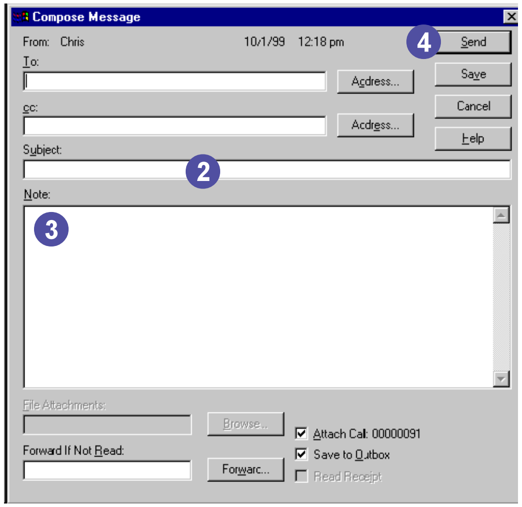
2. Click **Delete**. The message is deleted.

Replying to E-Mail Messages

When you reply to a message, SupportMail prepares a Compose Message screen with the recipient filled in.

Reply to an E-Mail Message

1. Click **Reply**.
2. Type a **subject** for the reply.
3. Type the **message** of the reply.
4. Click **Send**.

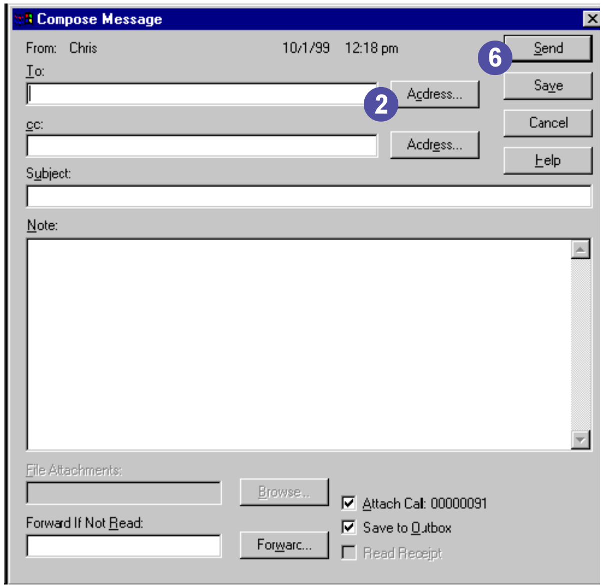


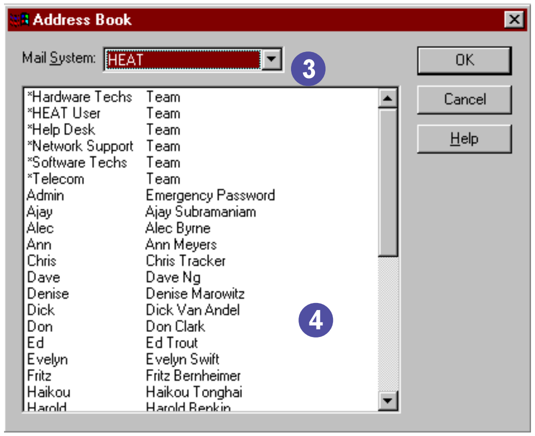
Forwarding E-Mail Messages

Use this feature to forward a received message to another person.

Forward an E-Mail Message

1. Click **Forward**.
2. Click **Address**.
3. Select a **Mail System**.
4. Double-click a **recipient**.
5. Repeat steps 2-4 for all recipients and cc recipients.
6. Click **Send**.





Sending E-Mail Messages

Use SupportMail to exchange e-mail with other HEAT users, and to send external e-mail messages. E-mail messages can be sent directly from SupportMail or from the Call Logging and Customer Windows.

TIP

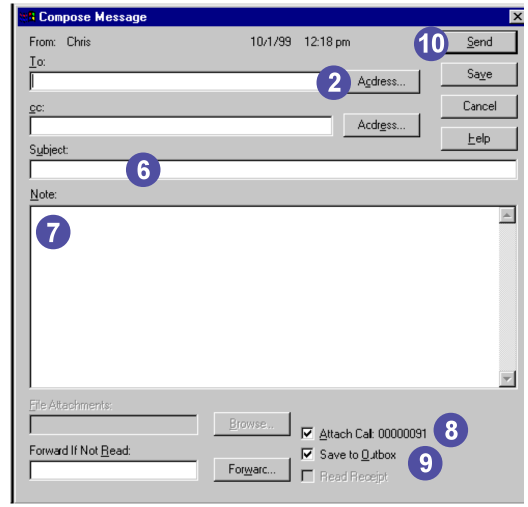
You can forward a message if it is not read. See Forward Unread Messages, in this chapter.

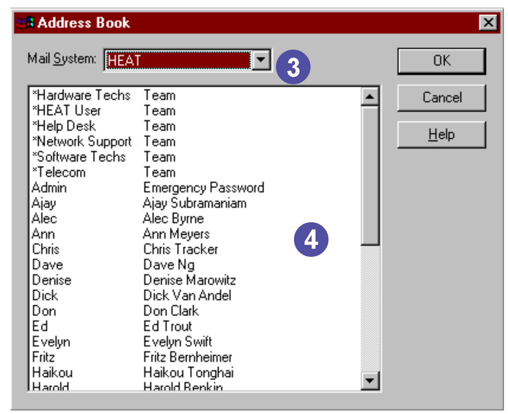
TIP

You can attach e-mail messages and Call Tickets. See Attaching E-Mail Messages to Call Tickets, this chapter.

Send an E-Mail Message from the SupportMail Window

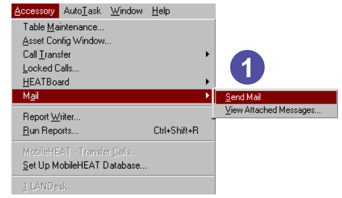
1. Select **New Message** from the **File** menu.
2. Click **Address** to view a list of recipients.
3. Select a **mail system**.
4. Double-click a **recipient**.
5. Repeat steps 2-4 for each recipient and cc recipient.
6. Type a **subject**.
7. Type the **message**.
8. Select the **Attach Call** check box to attach the currently displayed Call Record to a SupportMail message.
9. To save this message in your outbox to refer to later, click **Save in Outbox**.
10. Click **Send**.

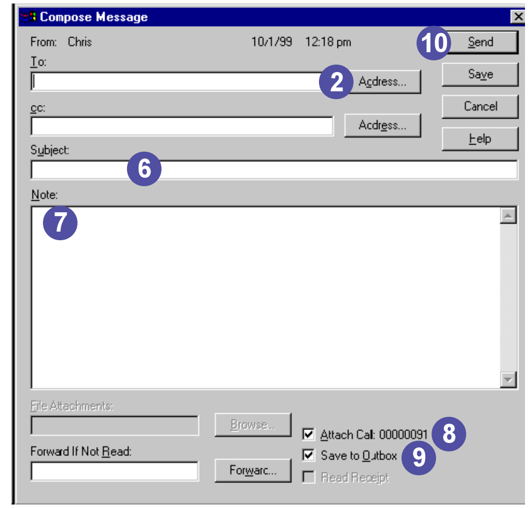


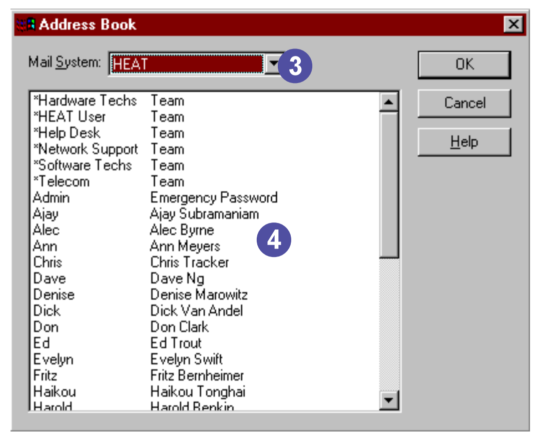


Send an E-Mail Message from the Call Logging Window

1. Select **Mail>>Send Mail** from the **Accessory** menu.
2. Click **Address** to view a list of recipients.
3. Select a **mail system**.
4. Double-click a **recipient**.
5. Repeat steps 2-4 for each recipient and cc recipient.
6. Type a **subject**.
7. Type the **message**.
8. Select the **Attach Call** check box to attach the currently displayed Call Record to a SupportMail message.
9. To save this message in your outbox to refer to later, click **Save to Outbox**.
10. Click **Send**.





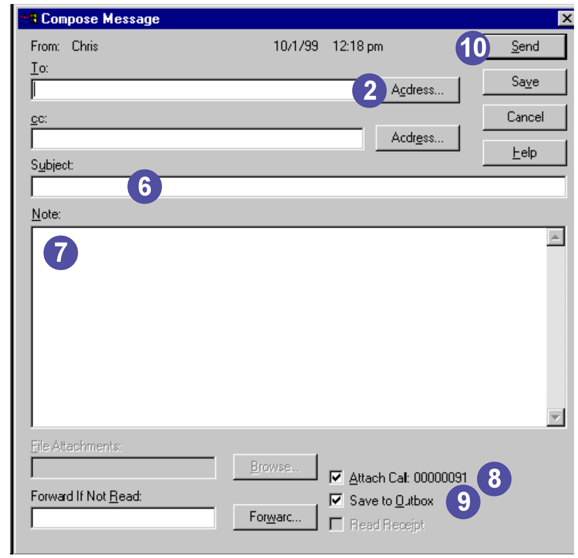


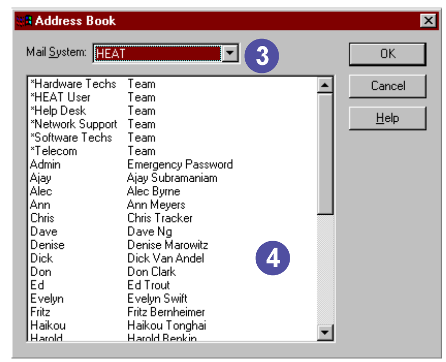
TIP

Type or select an address in the CC field to send a courtesy copy.

Send an E-Mail Message from the Customer Window

1. Select **Send Mail** from the **Mail** menu in the Customer window.
2. Click **Address** to view a list of recipients.
3. Select a **mail system**.
4. Double-click a **recipient**.
5. Repeat steps 2-4 for each recipient and cc recipient.
6. Type a **subject**.
7. Type the **message**.
8. Select the **Attach Call** box to attach the currently displayed Call Record to a SupportMail message.
9. To save this message in your outbox to refer to later, click **Save to Outbox**.
10. Click **Send**.





Attaching Call Records to E-Mail Messages

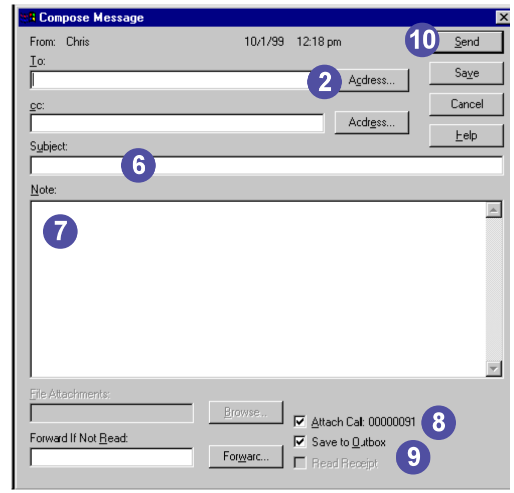
SupportMail allows you to link Call Records and e-mail messages. Use this feature to attach Call Records to important messages.

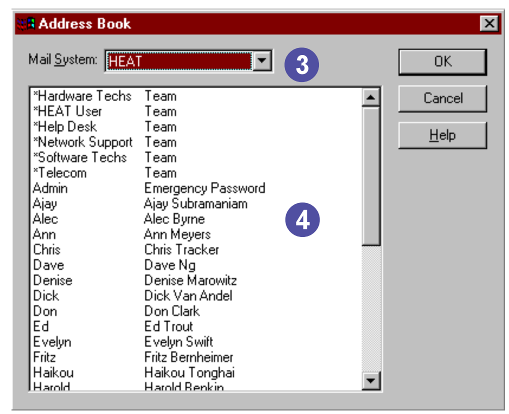
TIP

You can set up "Save to Outbox" and "Attach Current Call" defaults in the User Preferences dialog box. See "User Preferences," Chapter 10.

Attach a Call Records to an E-Mail Message

1. Select **New Message** from the **File** menu.
2. Click **Address** to view a list of recipients.
3. Select a **mail system**.
4. Double-click a **recipient**.
5. Repeat steps 2-4 for each recipient and cc recipient.
6. Type a **subject**.
7. Type the **message**.
8. Select the **Attach Call** box to attach the currently displayed Call Record to a SupportMail message.
9. To save this message in your outbox to refer to later, click **Save in Outbox**.
10. Click **Send**.



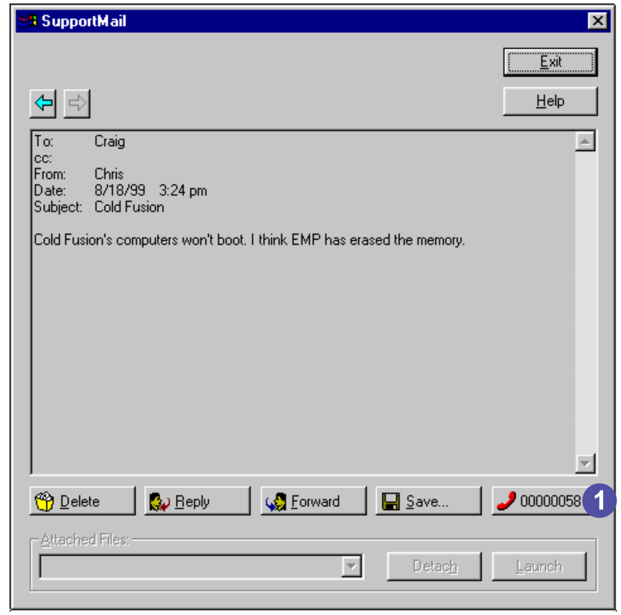


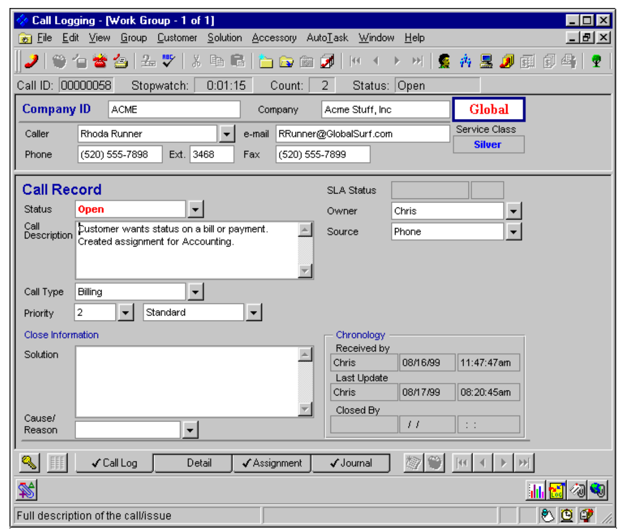
Viewing Attached Call Records

SupportMail lets you link Call Records and e-mail messages. You can view an e-mail from a Call Record or a Call Record from an e-mail.

View a Call Record Attached to an E-Mail Message

1. Click the **Attachment** button. The attached Call Record appears.





TRY THIS

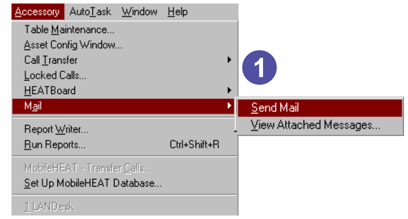
View a Call Record attached to an e-mail directly from a Call Ticket.

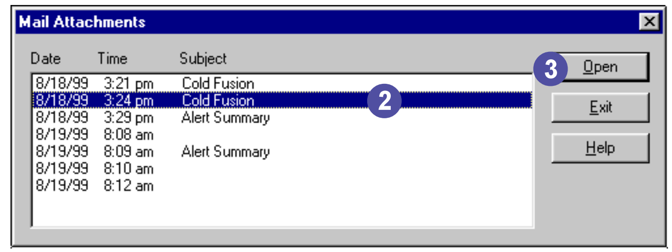
View an E-Mail Message Attached to a Call Ticket

1. Select **Mail>>View Attached Messages** from the **Accessory** menu.

2. Select the **message** you would like to view.

3. Click **Open**. The message appears.



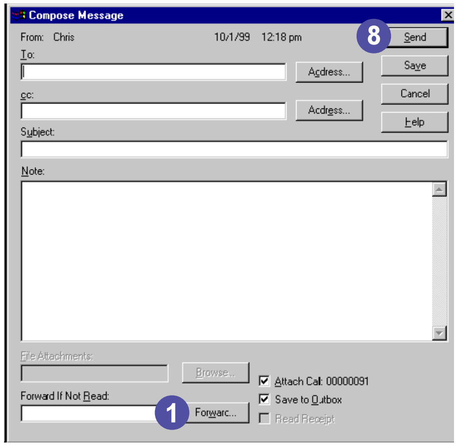


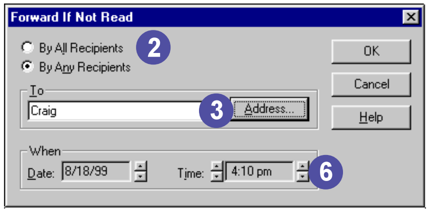
Forwarding Unread Messages

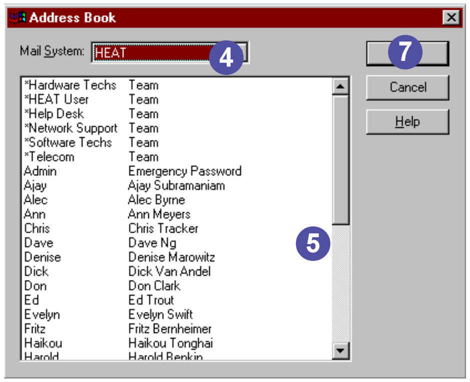
You can forward a message if it is not read by the original recipient within a specified timeframe.

Forward an Unread Message

1. Click **Forward** in the **Compose Message** dialog box.
2. To forward the message if not **all** recipients read it, click **By All Recipients.** To forward the message if no recipient reads it, click **By Any Recipients**.
3. Click **Address**.
4. Select a **mail system**.
5. Double-click a **recipient**.
6. Set the **time** and **date** that should elapse before the message is forwarded.
7. Click **OK**.
8. Click **Send**.







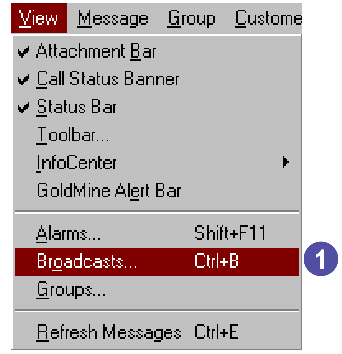
Sending Broadcast Messages

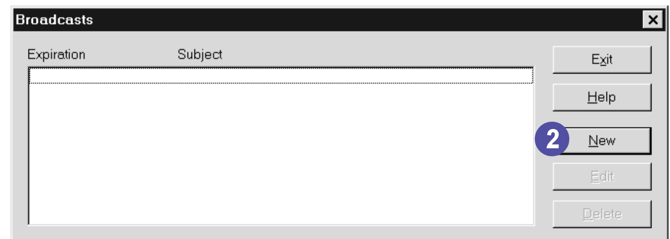
SupportMail can send a message to every person in your group.

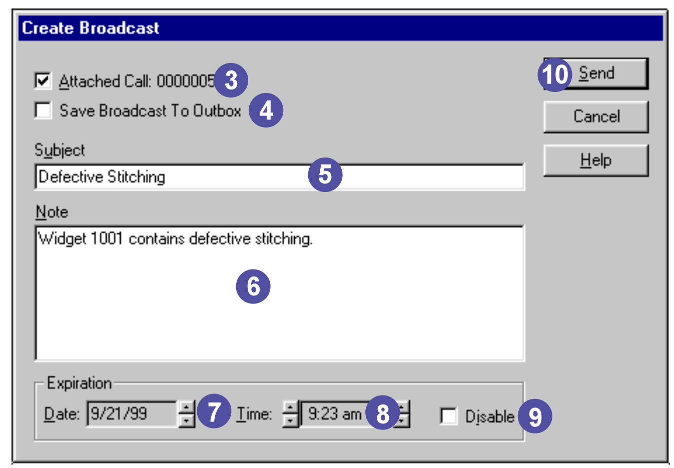
The message appears on every user's screen.

Send a Broadcast Message

1. Select **Broadcasts** from the **View** menu.
2. Click **New**.
3. To attach the current Call Record, click **Attached Call**.
4. To save this message in the Outbox to be reviewed later, click **Save Broadcast to Outbox**.
5. Type a **subject** in the **Subject** field.
6. Type the **text** of the message in the **Note** field.
7. Set a **time** and **date** for the message to self-delete. Any users who log in before the expiration time and date will see the broadcast.
8. Click the **up** or **down arrows** to set a time for the message to self-delete.
9. To prevent the message from self-deleting, mark the **Disable** check box.
10. Click **Send**.





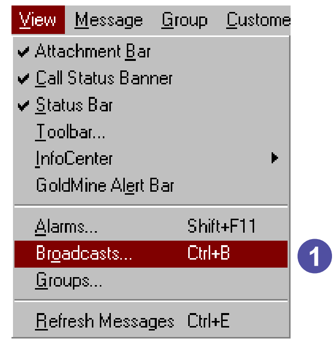


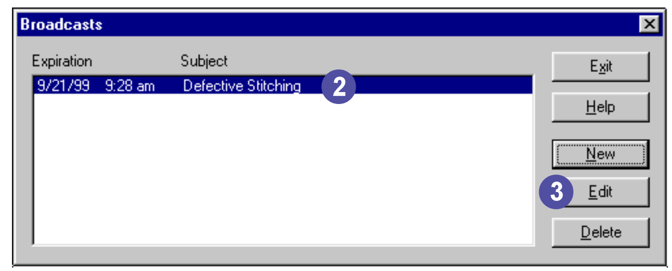
Editing Broadcast Messages

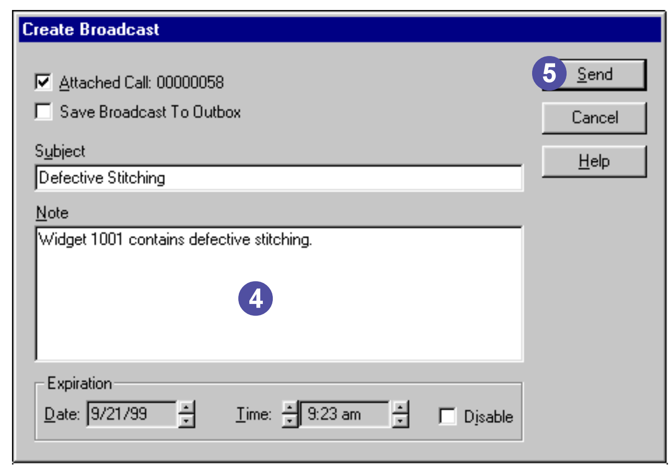
You can edit and resend a broadcast message. Recipients who have read the old message will not receive the new message. Recipients who have not read the old message will receive the new message.

Edit a Broadcast Message

1. Select **Broadcasts** from the **View** menu.
2. Select the **broadcast message** to edit.
3. Click **Edit**.
4. Edit the **fields** and **check boxes** as necessary.
5. Click **Send**.





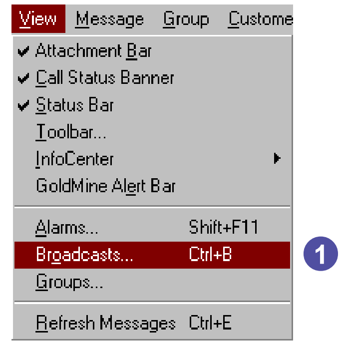


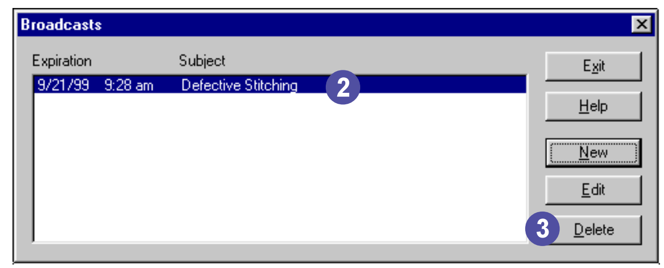
Deleting Broadcast Messages

You can delete a broadcast message from your workstation.

Delete a Broadcast Message

1. Select **Broadcasts** from the **View** menu.
2. Select the **broadcast message** to delete.
3. Press **Delete**. Any users who have not yet received the broadcast will not see it.





Organizing SupportMail

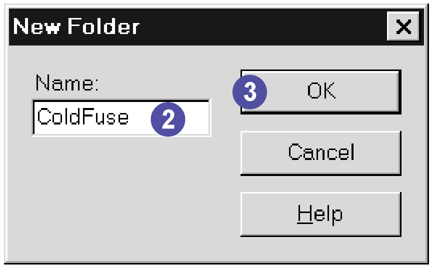
You organize your mail in folders. You can create a folder to hold incoming mail from a certain person, or copies of mail sent regarding a certain subject.

TIP

You can change the default names of mail folders. See Changing Folder Names in "User Preferences," Chapter 10.

Create a New Folder

1. Select **New Folder** from the **File** menu.
2. Type a **name** for the new folder in the **Name** field.
3. Click **OK**.

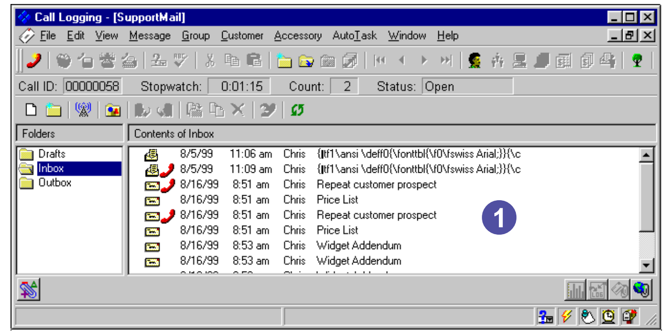


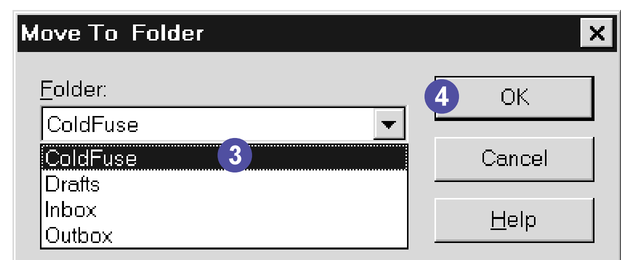
Moving Messages from One Folder to Another

You can move an e-mail message from one folder to another.

Move a Message from One Folder to Another

1. Select an **e-mail message** to move.
2. Select **Move** from the **Message** menu.
3. Select a **new folder** for the message.
4. Click **OK**.



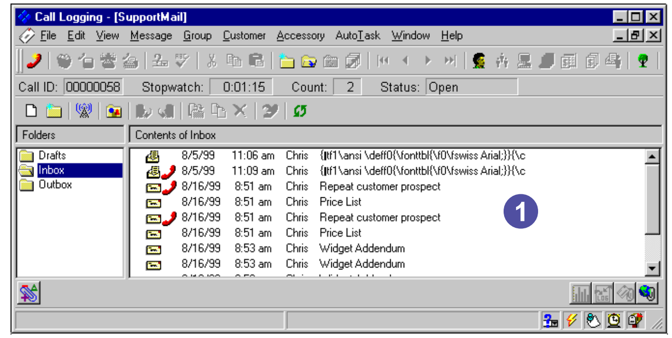


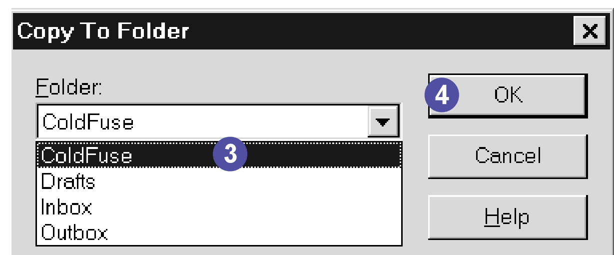
Copying Messages from One Folder to Another

You can copy an e-mail message from one folder to another.

Copy a Message from One Folder to Another

1. Select an **e-mail message** to copy.
2. Select **Copy** from the **Message** menu.
3. Select a **new folder** for the message.
4. Click **OK**.





10

User Preferences

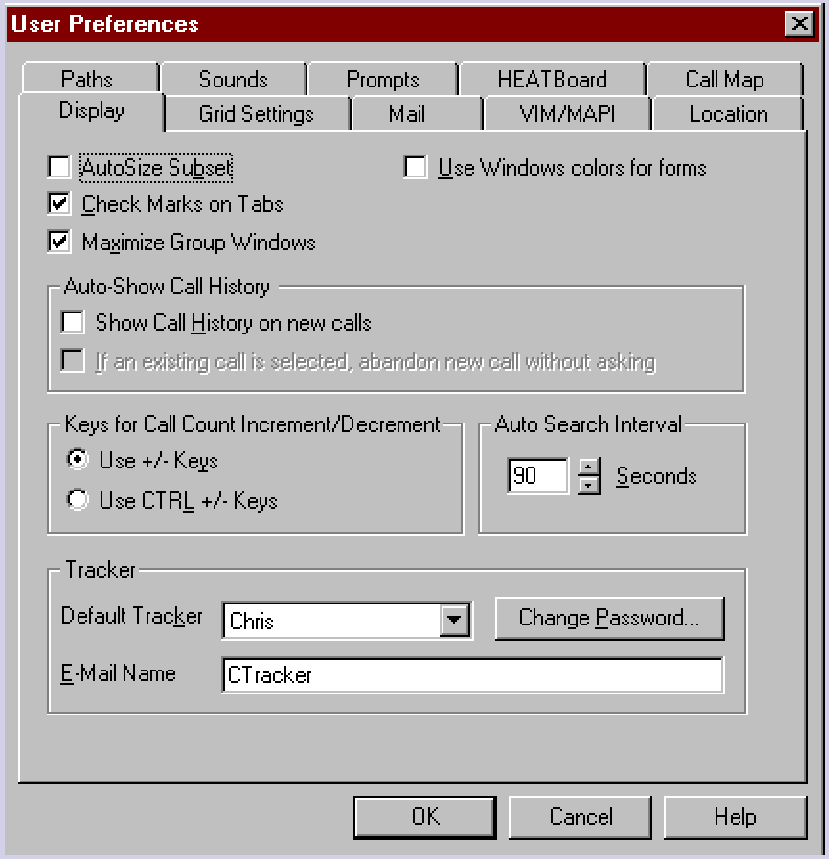
IN THIS CHAPTER

You can customize many settings that control the way HEAT operates. The settings affect only your workstation, not the entire HEAT system.

Your system administrator controls your access to many areas of HEAT, but you can customize many of the HEAT features to your personal preference. For example, you can show or hide the Information Center, set sounds associated with assignments, set external e-mail, etc.

The Display Tab

From the Display tab, customize the Call History display, the Call Counting Hot Keys, the Auto Search interval, and the Tracker's name, e-mail, and password



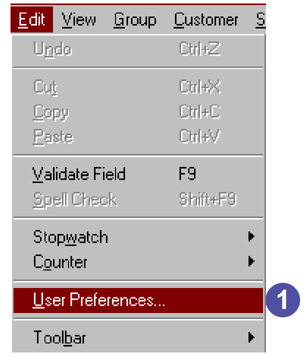
Customizing the Display

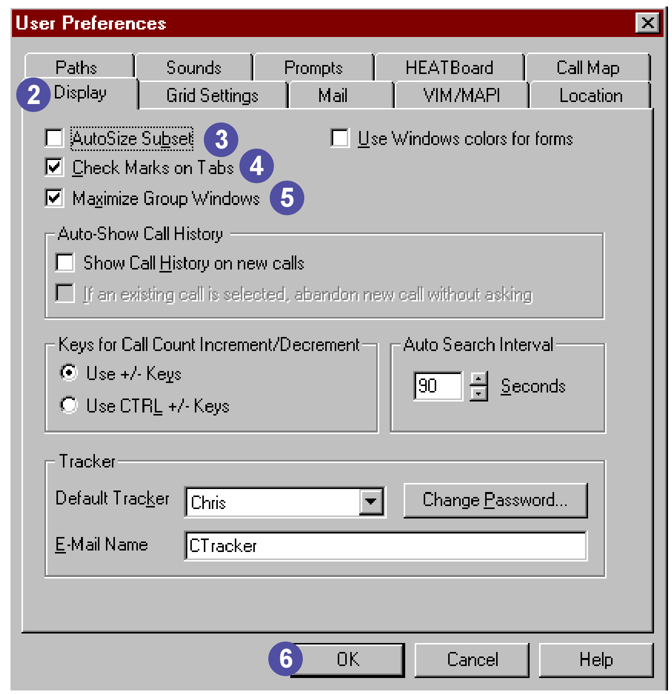
You can change the size of the Profile Subset to view as much or as little of the customer information as you like. HEAT can adjust the size of the Profile Subset to display all Profile Subset fields. It can also maximize Call Group windows automatically.

HEAT can put a check mark on the tabs of active tab screens (Call Log, Detail, Assignment, and Journal). A check mark on the tab identifies a screen that has information.

Customize Display

1. Select **User Preferences** from the **Edit** menu.
2. Click the **Display** tab.
3. Click the **AutoSize Subset** check box to display all Profile Subset fields.
4. Click the **Check Marks on Tabs** check box to put a check mark on active tab screens (Call Log, Detail, Assignment, and Journal).
5. Click the **Maximize Group Windows** check box to maximize the windows automatically.
6. Click **OK**.





Viewing Call History

HEAT can display a customer's Call History when you enter a Customer ID into a new Call Record. If a Call Record exists for this problem, you can update that record rather than begin a new one.

You can configure HEAT to display the customer's Call History or prompt you to go automatically to an existing Call Record.

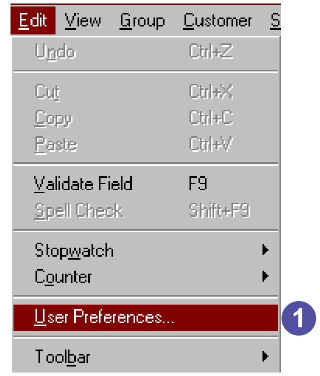
You can also configure HEAT not to show existing Call Records.

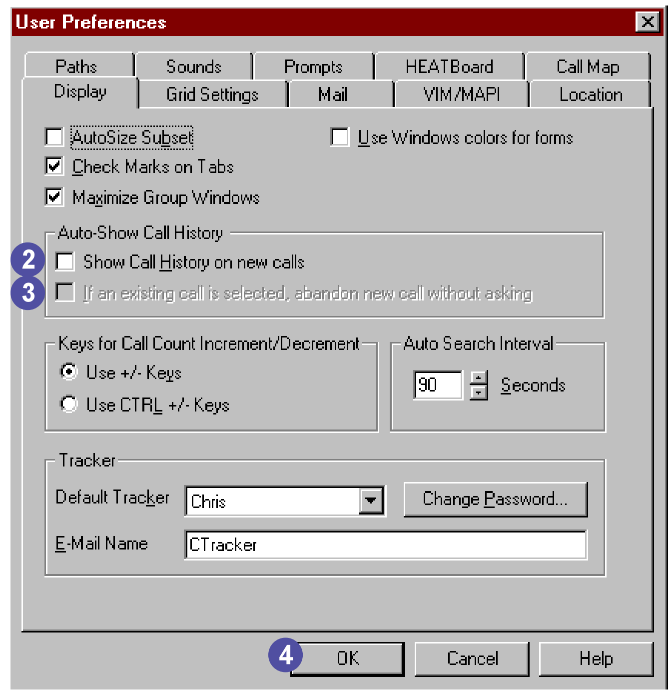
SEE ALSO

Setting Call History Chronology, in this chapter.

View Call History

1. Select **User Preferences** from the **Edit** menu.
2. Click **Show Call History on New Calls** on the Display Tab to show the Call History when you first select a customer for a new call.
3. To automatically abandon the new Call Record if you select an existing Call Record from the Call History, click **If an existing call is selected, abandon new call without asking**.
4. Click **OK**.





Counting the Number of Calls

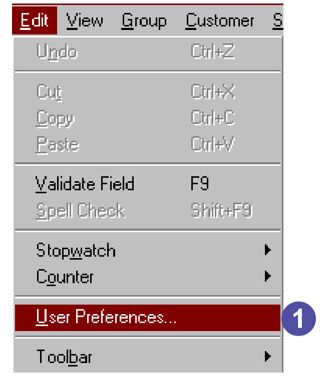
If several people call about the same problem, you do not have to open a new Call Record for each one. Instead, use the Call Counter to record the number of calls about the problem. You can increment or decrement the Call Counter by pressing hot keys on the keyboard. The Call Counter appears in the Call Status banner.

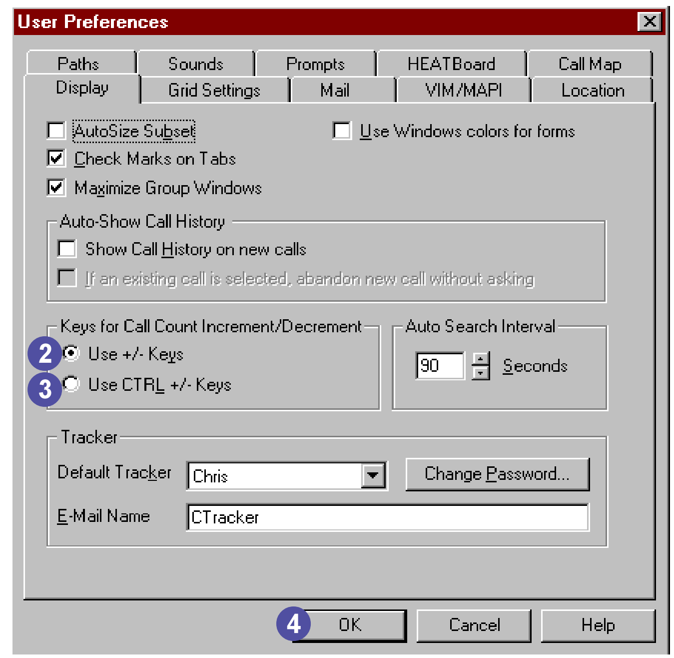
TIP

If you use the + and - keys to change the call count, you can't use the numeric keypad for data entry.

Change the Keys to Count Calls

1. Select **User Preferences** from the **Edit** menu.
2. In the Display Tab, click **Use +/- Keys** to use the + and – keys.
3. Click **Use CTRL +/- Keys** to use the CTRL, +, and – keys.
4. Click **OK**.



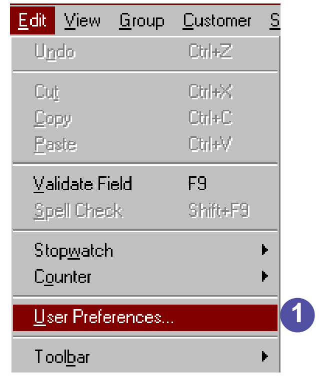


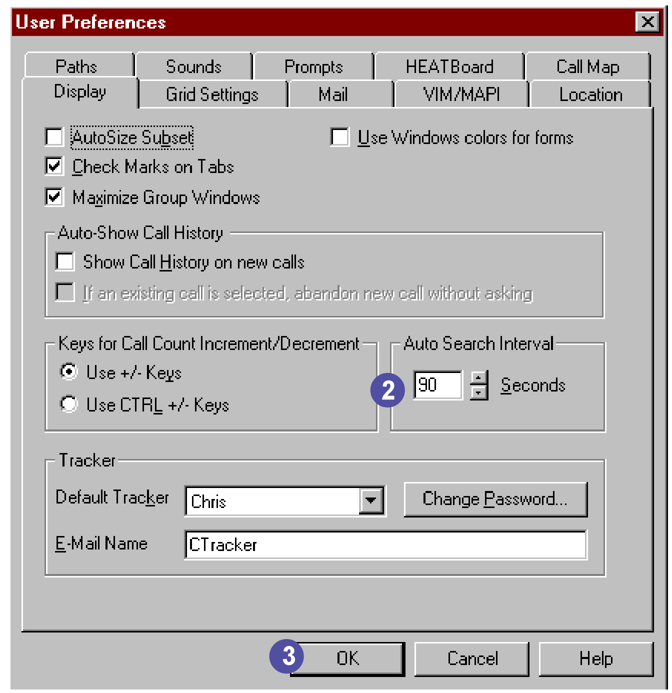
Changing Auto Search Intervals

You can set up HEAT to search a knowledge base automatically while you enter information into a Call Record. These searches must be defined in the Administrator module. Contact your system administrator to define these searches.

Change the Auto Search Interval

1. Select **User Preferences** from the **Edit** menu.
2. In the Display Tab, enter an **Auto Search interval** in seconds, or click the arrows to change the interval.
3. Click **OK**.





Changing Tracker Information

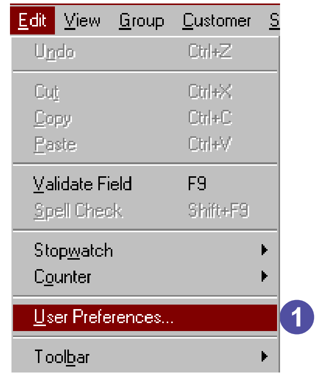
When you open a new Call Record, HEAT enters the default tracker's name into the Tracker field. You can change the default tracker name if you don't want to use your own. For example, if you want calls logged by Call Screener Dave to be owned by Technician Chris, then Dave would have a default tracker of Chris.

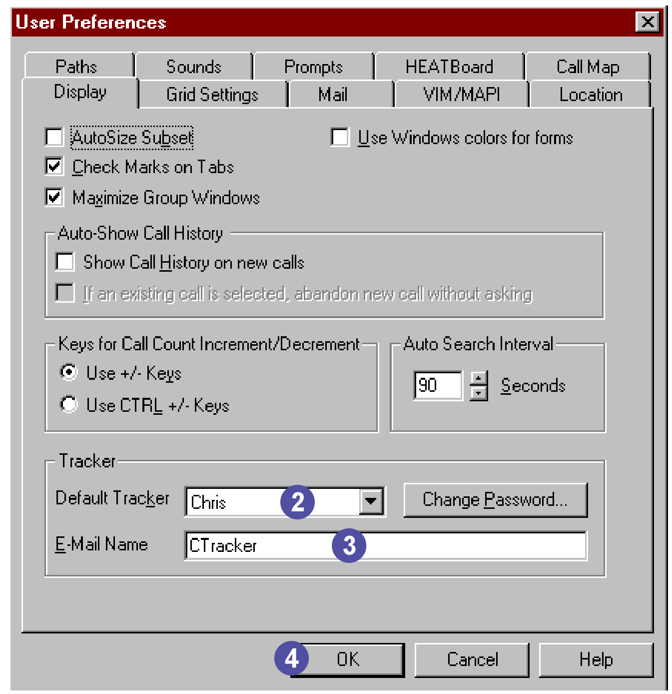
TIP

The e-mail address is used for the tracker in the Business Process Automation module.

Set the Default Tracker

1. Select **User Preferences** from the **Edit** menu.
2. In the Display tab, select a **tracker name** from the drop-down box.
3. Type your tracker's e-mail address in the **E-Mail Name** field.
4. Click **OK**.





Changing Your Password

You can change your HEAT password. For security reasons, your support center may require that you change your password periodically.

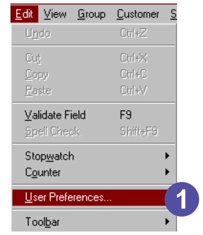
Your password may contain 1-8 letters, numbers, or spaces. Passwords are case-sensitive.

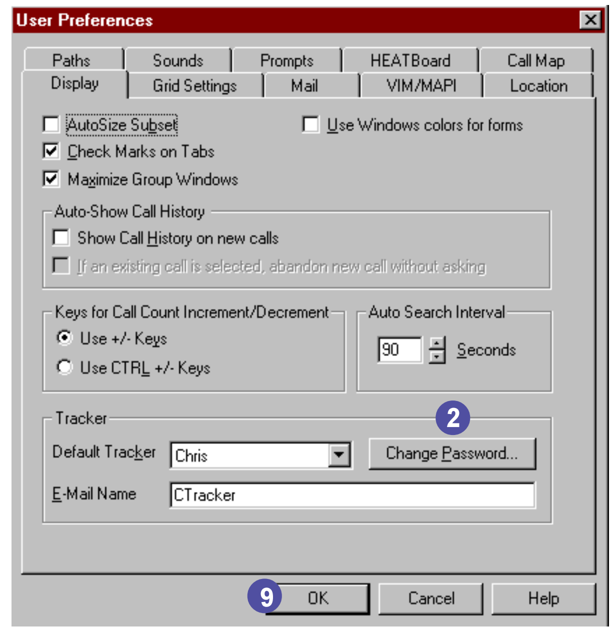
TIP

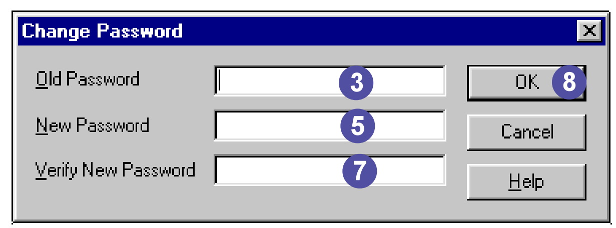
Your System Administrator can reset a forgotten password.

Change Your Password

1. Select **User Preferences** from the **Edit** menu.
2. Click **Change Password**.
3. Enter your old **password** in the **Old Password** field.
4. Press **Tab**.
5. Enter your new **password** in the **New Password** field.
6. Press **Tab**.
7. Enter your new **password** in the **Verify New Password** field.
8. Click **OK**.
9. Click **OK**.

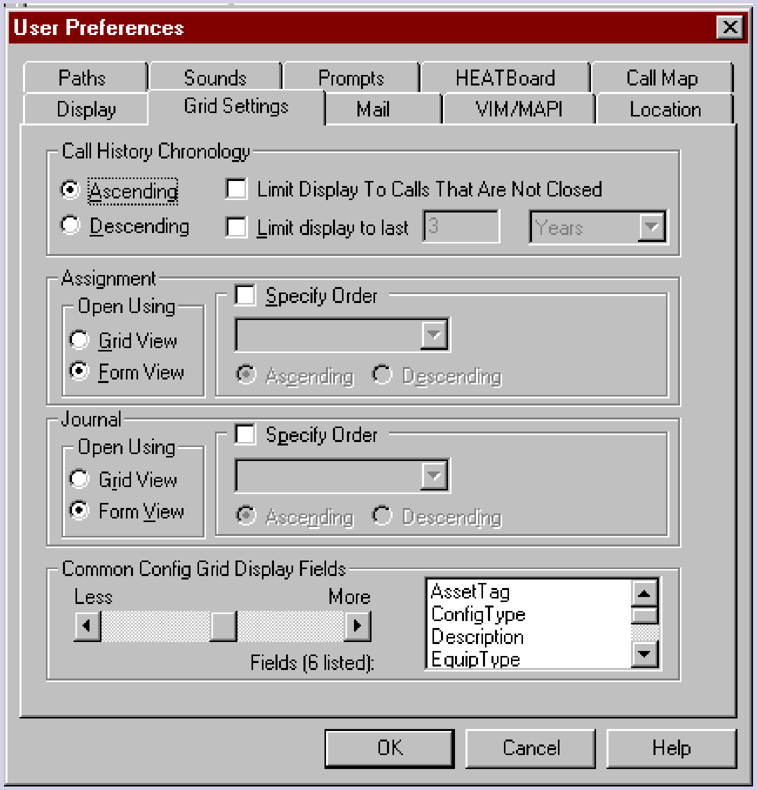






The Grid Settings Tab

From the Grid Settings tab, set Call History options, the Assignment and Journal view and sort orders, and the fields displayed on the Configuration screen.



Setting Call History Chronology

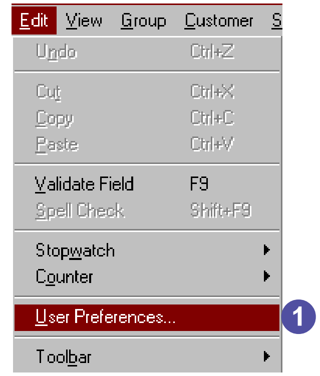
You can sort Call History from lowest to highest or highest to lowest values. You can exclude closed calls from Call History. You can limit Call History to a range of dates.

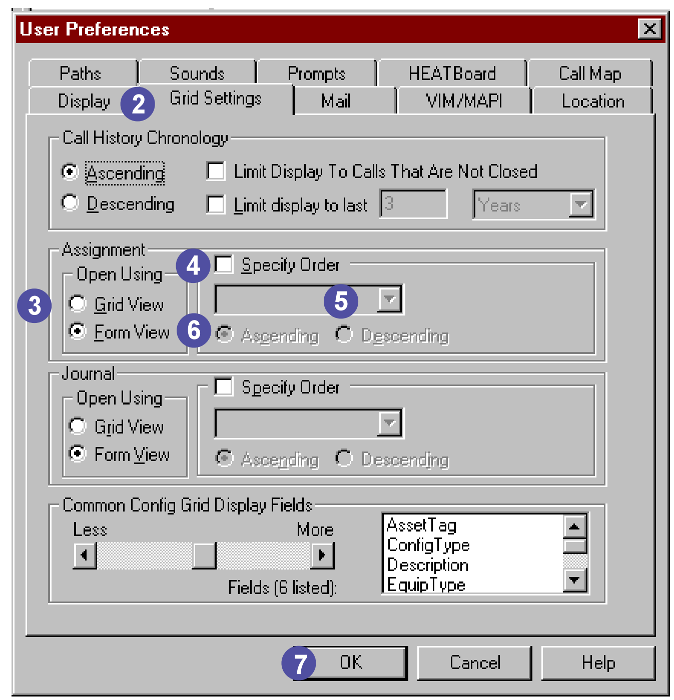
SEE ALSO

View a Customer's Call History in "Call Logging," Chapter 2.

Set Call History Chronology

1. Select **User Preferences** from the **Edit** menu.
2. Click **Grid Settings.**
3. Click **Ascending** or **Descending** to set the sort order.
4. To limit the display to a reasonable time period, click **Limit Display To Calls That Are Not Closed**.
5. To display the last call, click **Limit display to last**.
6. Enter a **number**.
7. Select a **time period** from the drop-down box. If you select a date field, the time field following will also be included.
8. Click **OK**.





Setting the Assignment View

A Call Record can have multiple assignments. You can set the default view as a grid list or as forms.

In grid view a grid displays a list of Assignments. Each row in the Grid represents one Assignment for the selected Call Record.

In form view each Assignment appears in its own full-screen form.

You can sort the assignments based on one of several fields and put them into ascending or descending order.

SEE ALSO

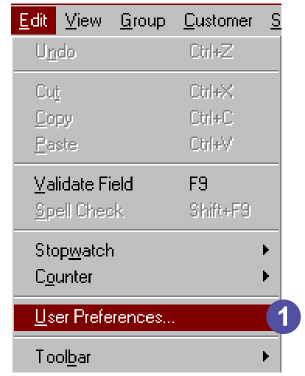
Viewing Assignments in "Call Logging," Chapter 2.

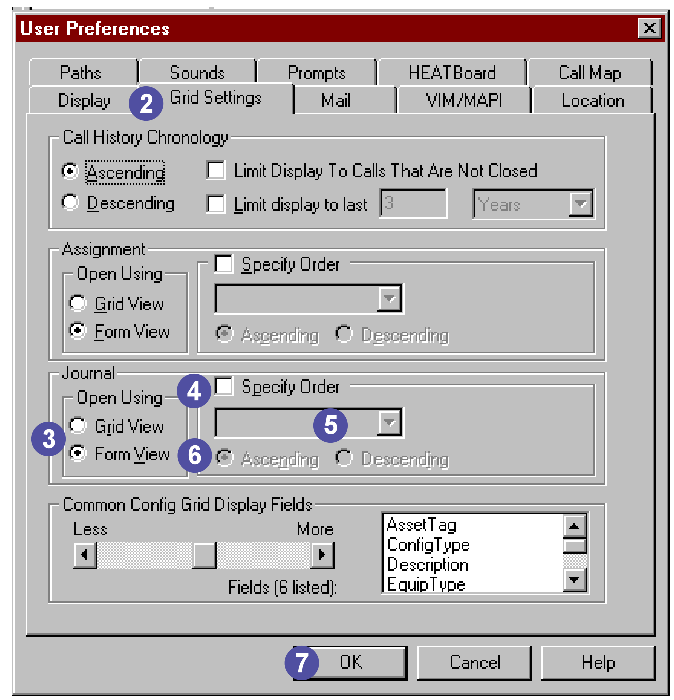
TIP

Sorting by date will also sort by the time.

Select Grid or Form View

1. Select **User Preferences** from the **Edit** menu.
2. Click **Grid Settings.**
3. Click **Grid View** or **Form View** to select the view.
4. Click **Specify Order**.
5. Select a **field** to sort by from the drop-down box.
6. Click **Ascending** or **Descending** to set the sort order.
7. Click **OK**.





Setting the Journal View

A Call Record can have multiple journals. You can set the default view as a grid list or as forms.

In grid view a grid displays a list of journals. Each row in the grid represents one journal for the selected Call Record.

In form view each journal appears in its own full screen form.

You can sort the journals based on one of several fields and put them into ascending or descending order.

SEE ALSO

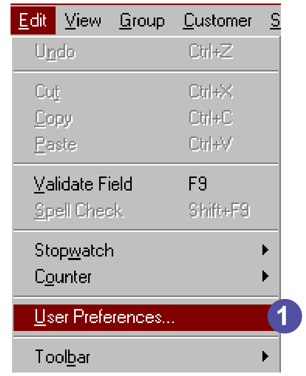
Viewing Journal Entries in "Call Logging," Chapter 2.

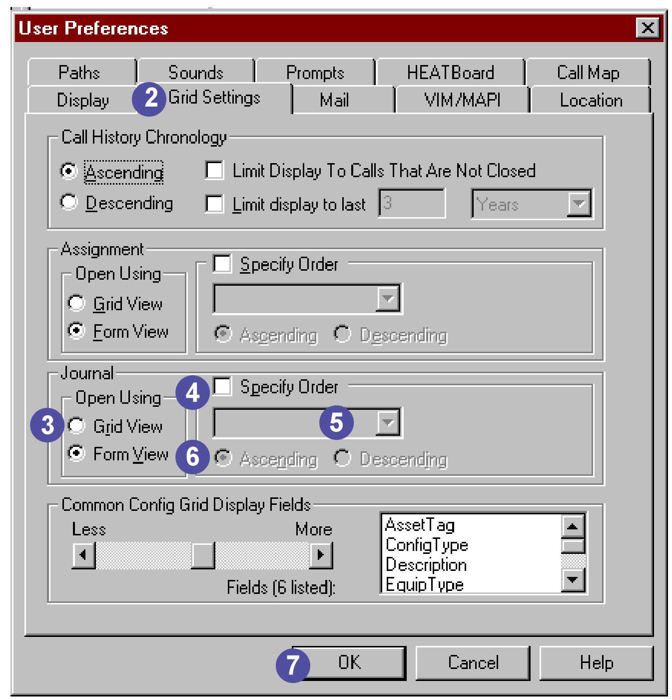
TIP

Sorting by date will also sort by the time.

Set the Journal View

1. Select **User Preferences** from the **Edit** menu.
2. Click **Grid Settings.**
3. Click **Grid View** or **Form View** to select the view.
4. Click **Specify Order**.
5. Select a **field** to sort by from the drop-down box.
6. Click **Ascending** or **Descending** to set the sort order.
7. Click **OK**.





Setting the Config Fields Displayed in Grid View

You can specify how many Common Configuration fields are displayed in the Configuration table grid.

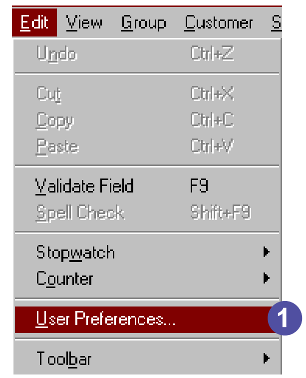
The list box displays the fields that will appear in the Configuration table's grid view.

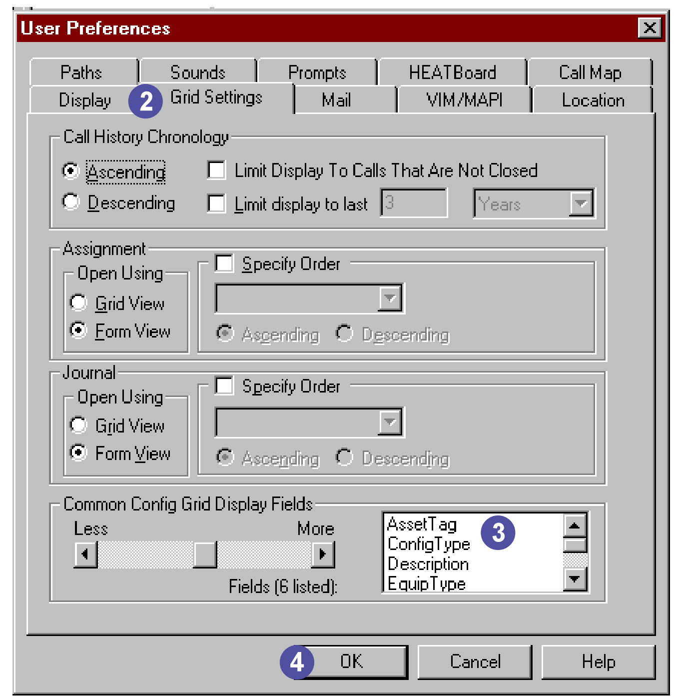
TIP

Fields are selected based on how many different configuration screens they appear on.

Set the Number of Fields Displayed in the Config Screen

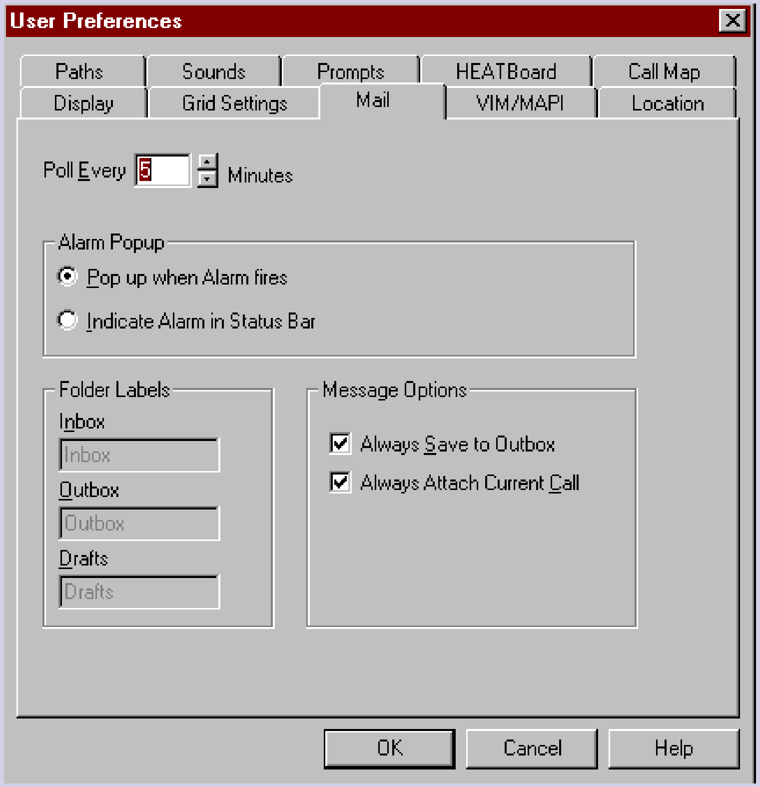
1. Select **User Preferences** from the **Edit** menu.
2. Click **Grid Settings**.
3. In the **Common Config Grid Display Fields** box move the slider left or right to select the number of displayed fields.
4. Click **OK**.





The Mail Tab

From the Mail tab, set the polling interval for e-mail messages and alarms, alarm options, e-mail options, and mail folder names.



Setting Polling Intervals for Notifications

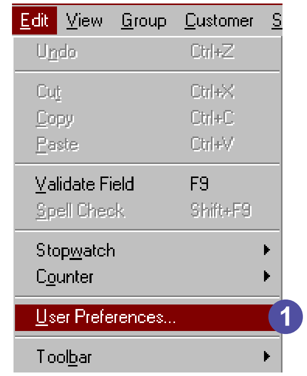
HEAT polls for mail and alarms at set intervals. From this screen you can set the polling interval.

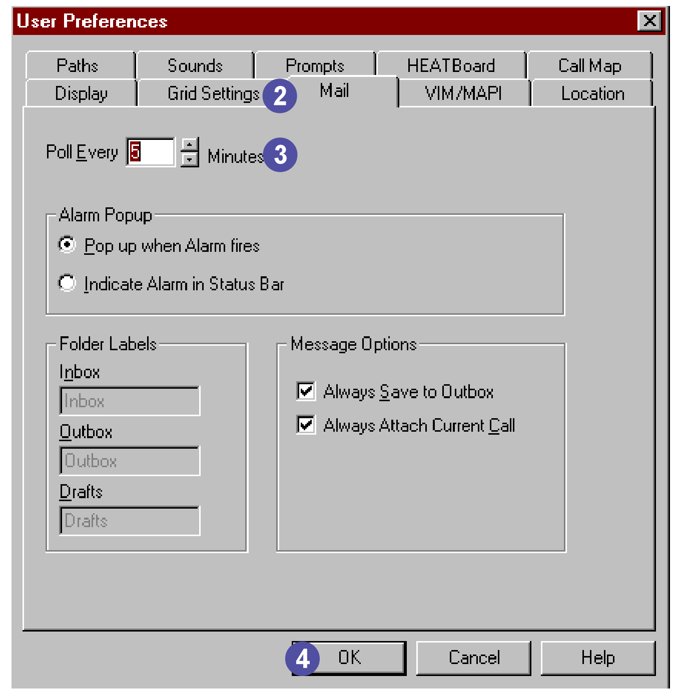
TIP

Your System Administrator may define boundaries for your polling order.

Set Polling Interval

1. Select **User Preferences** from the **Edit** menu.
2. Click **Mail**.
3. Type a **polling interval** in minutes, or click the arrow keys to set the polling interval.
4. Click **OK**.





Setting Alarm Options

When an alarm fires, HEAT can open the Alarm window or display an icon in the Status bar.

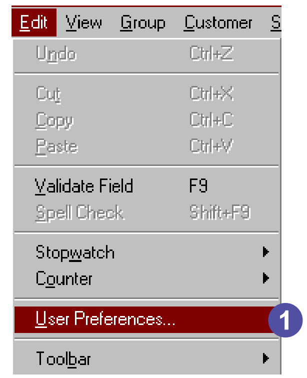
HEAT can also play a sound when an alarm fires.

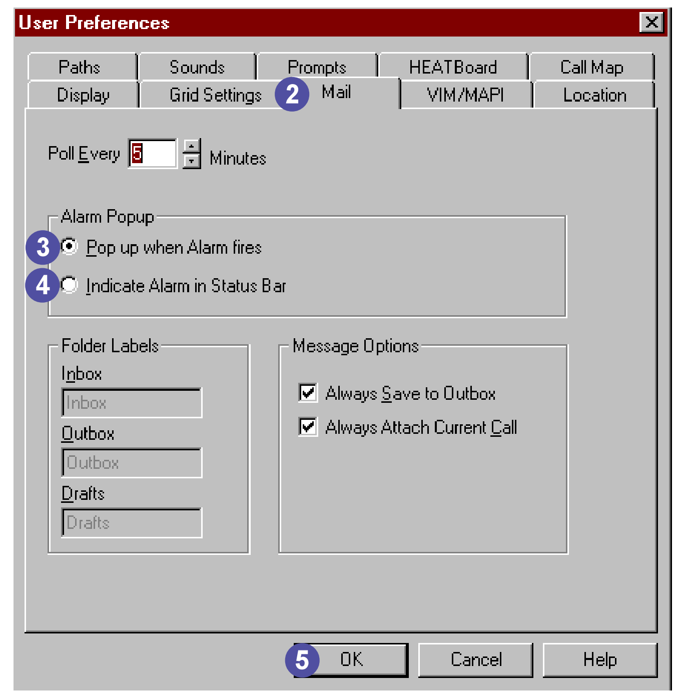
SEE ALSO

Setting Sounds, in this chapter.

Set Alarm Options

1. Select **User Preferences** from the **Edit** menu.
2. Click **Mail**.
3. Click **Pop up when Alarm fires** to set the alarm window to open.
4. Click **Indicate Alarm in Status Bar** to set only the icon to appear.
5. Click **OK**.





Setting E-Mail Message Options

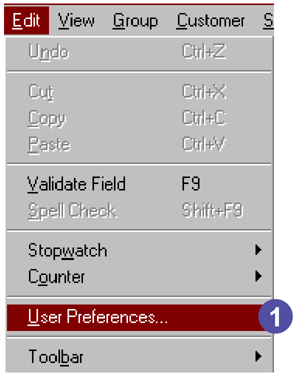
You can set up defaults for e-mail messages.

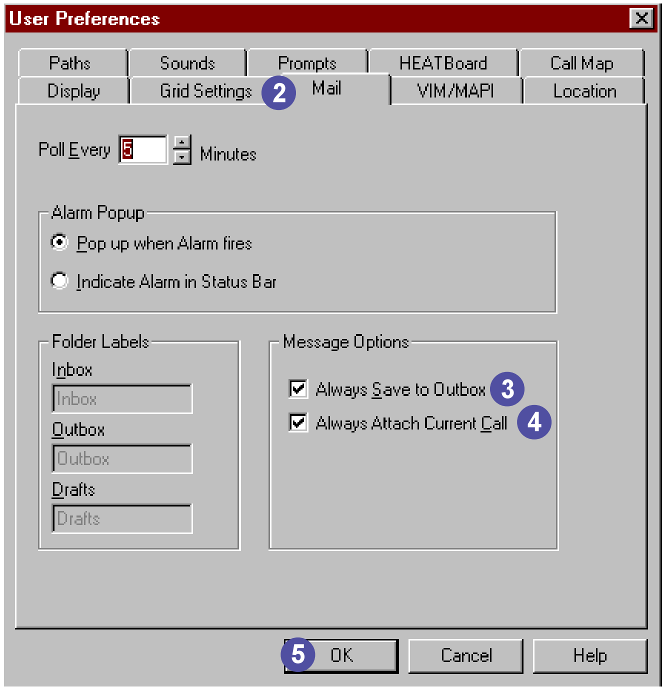
Select "Save to Outbox" to automatically save a copy of your e-mail message to your outbox for later reference. Select "Always Attach Current Call" to automatically attach a currently displayed Call Record to an e-mail message.

Both defaults may be overridden at any time from the e-mail message itself.

Set E-Mail Message Options

1. Select **User Preferences** from the **Edit** menu.
2. Click **Mail**.
3. Select the **Always Save to Outbox** check box to save this message in your outbox to refer to later.
4. Select the **Always Attach Current Call** check box to attach a currently displayed Call Record to a SupportMail message.
5. Click **OK**.



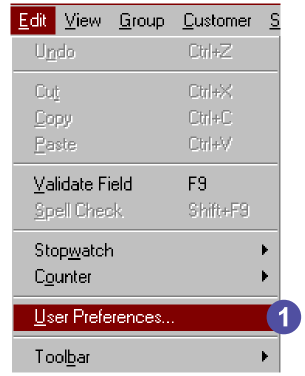


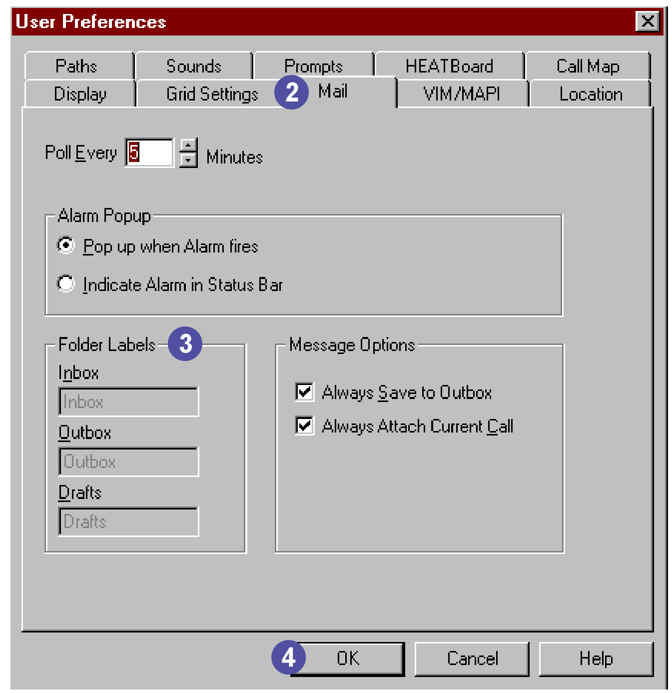
Setting Folder Labels

You can rename the three SupportMail mail folders.

Set Folder Labels

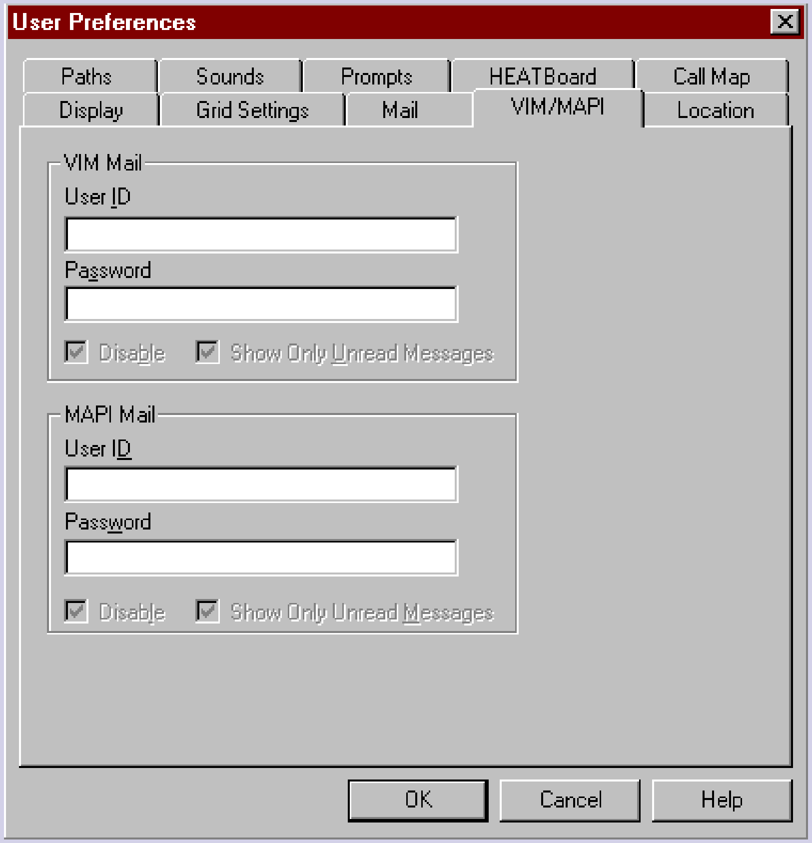
1. Select **User Preferences** from the **Edit** menu.
2. Click **Mail**.
3. Type the name of the **Inbox**, **Outbox**, and **Drafts** folders in their respective fields.
4. Click **OK**.





The VIM/MAPI Tab

From the VIM/MAPI tab, set up VIM and MAPI settings for external e-mail.



Setting Up External E-Mail

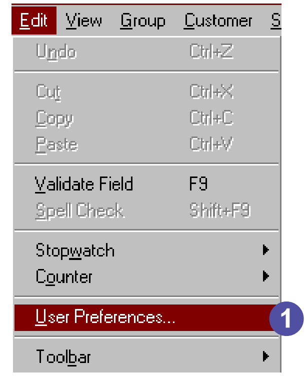
HEAT supports external e-mail systems using either VIM or MAPI formats. You can enable or disable either format. Both mail types are disabled by default.

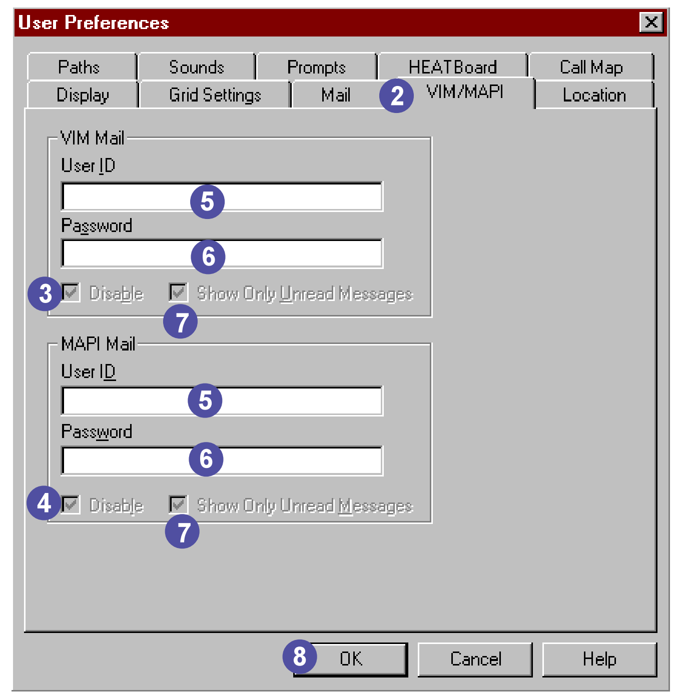
You can read all messages, or only unread messages.

A mail system may run faster when set to display only unread messages.

Set Up External E-Mail

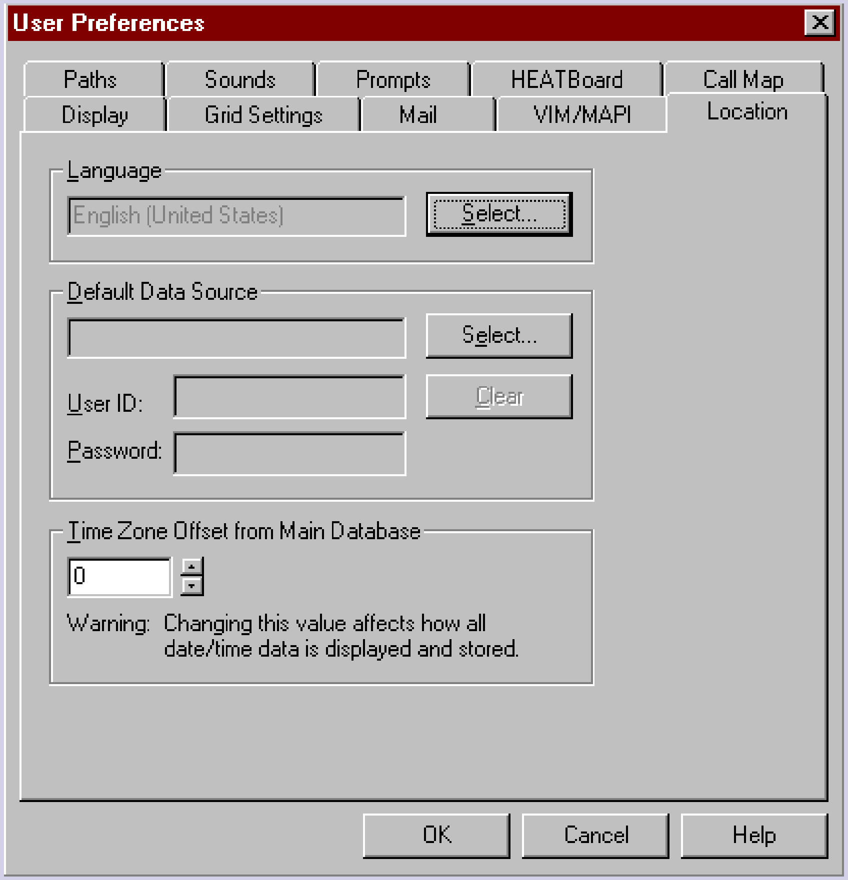
1. Select **User Preferences** from the **Edit Menu**.
2. Click **VIM/MAPI**.
3. To enable VIM, click the VIM **Disable** check box to remove the check.
4. To enable MAPI, click the MAPI **Disable** check box to remove the check.
5. Enter your **user name**.
6. Enter your **password**.
7. Click the **Show Only Unread Messages** check box to show only unread messages.
8. Click **OK**.





The Location Tab

From the Location tab, set the language used at your support center, the time zone offset between your support center and the main database, and the default data source.



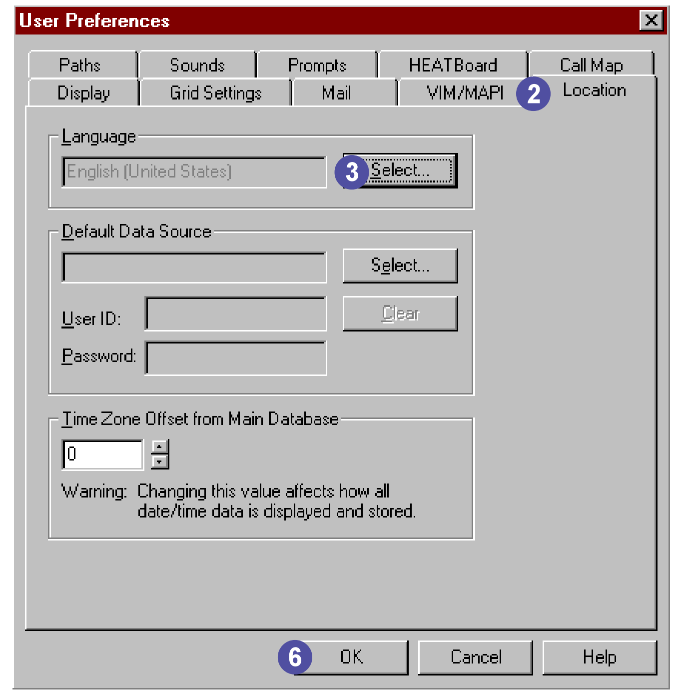
Selecting the HEAT Display Language

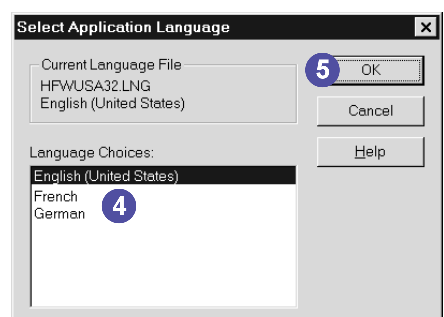
You can run HEAT in one of several languages. You can select the language to run at your support center.

To use this feature you must first install HEAT with the appropriate language. Only installed languages appear in the Select Application Language dialog box.

Select the Language

1. Select **User Preferences** from the **Edit** menu.
2. Click **Location.**
3. Click **Select.**
4. Select a **language.**
5. Click **OK.**
6. Click **OK.**





Setting the Default Data Source

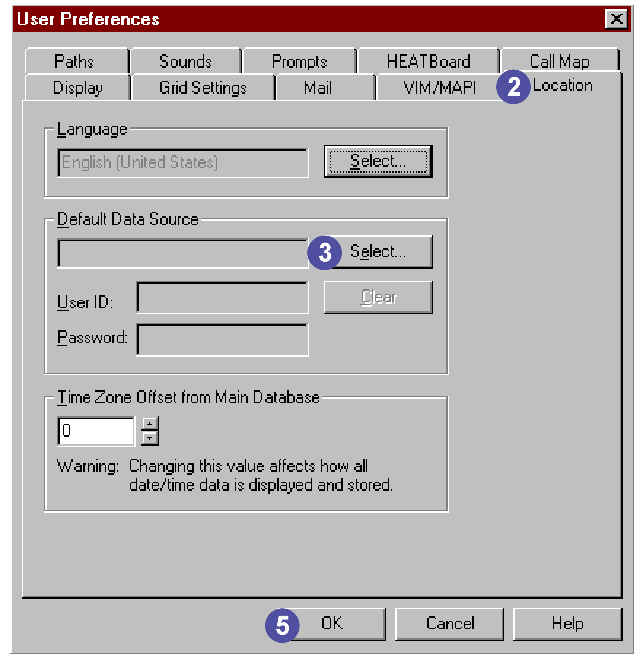
HEAT connects to your database via an ODBC data source that you select when you launch Call Logging.

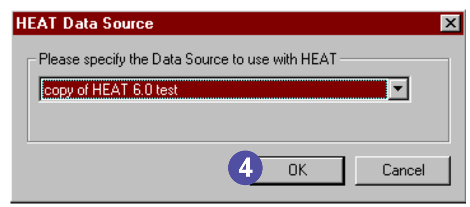
If you specify a default data source, HEAT will not prompt you to select a data source when you log in.

Select an existing data source by clicking the Select button.

Select a Default Data Source

1. Select **User Preferences** from the **Edit** menu.
2. Click **Location.**
3. Click **Select** in the Default Data Source field.
4. Select a **data source.**
5. Click **OK** to exit.





Setting the Time Zone Offset

When a support center and its database are in two different time zones, collecting and saving data with reference to a single time zone can be critical. You can set the time zone offset from the database, allowing your computer and the database to exchange data at the same numerical time.

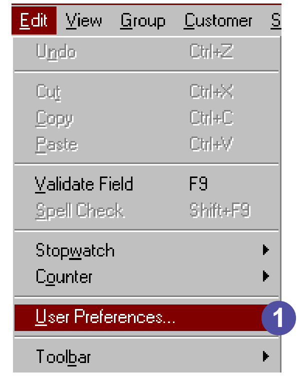
The Time Zone Offset shows the difference in hours between your time zone and the database's time zone.

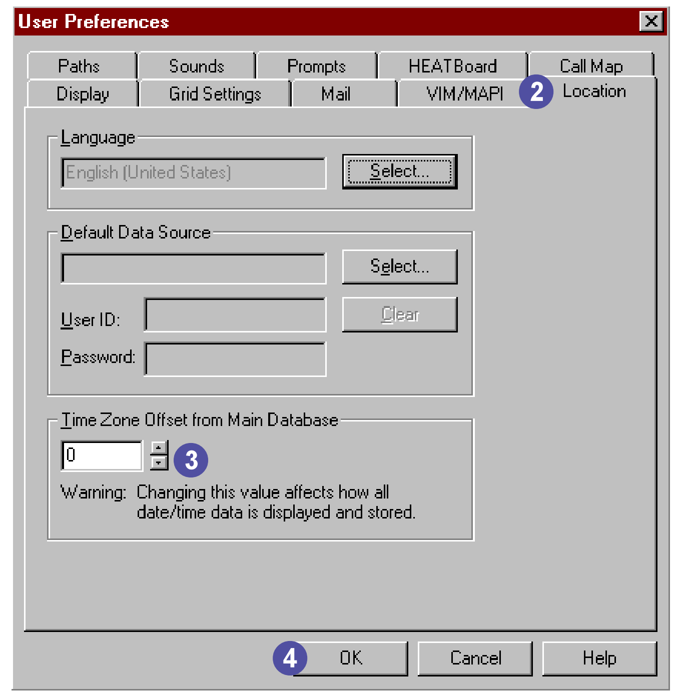
TIP

This feature must be enabled in the Administrator Module by your system administrator.

Set the Time Zone Offset

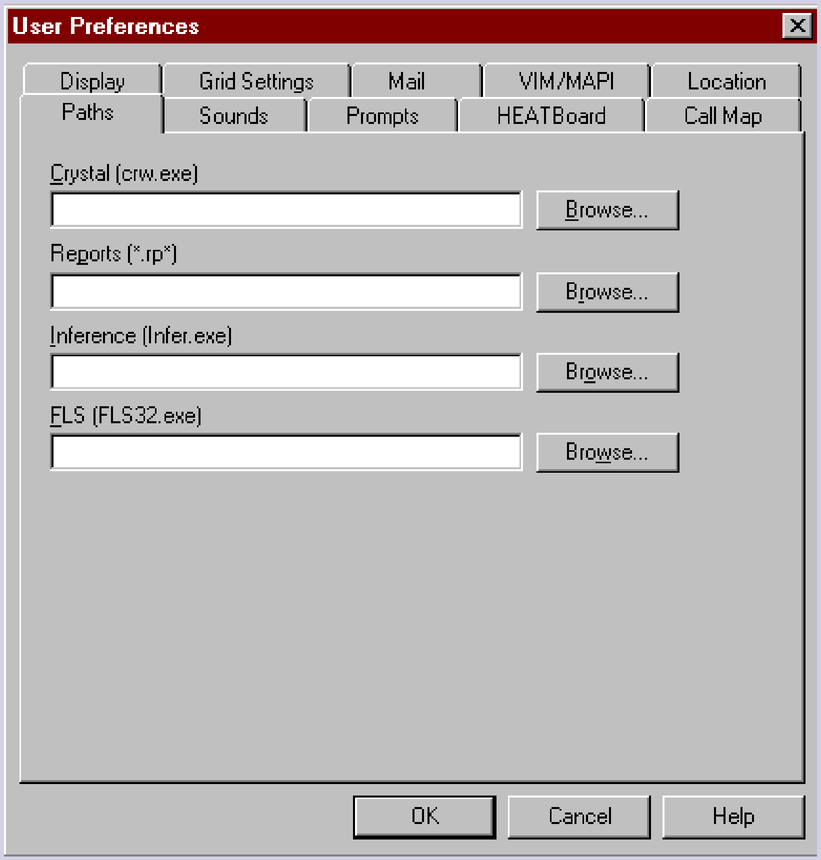
1. Select **User Preferences** from the **Edit** menu.
2. Click **Location**.
3. Set the **Time Zone Offset from Main Database**. The number should equal the difference in hours between your location and the main database.
4. Click **OK**.





The Paths Tab

From the Paths tab, set paths to Crystal Report Writer, and report and knowledge base executable files



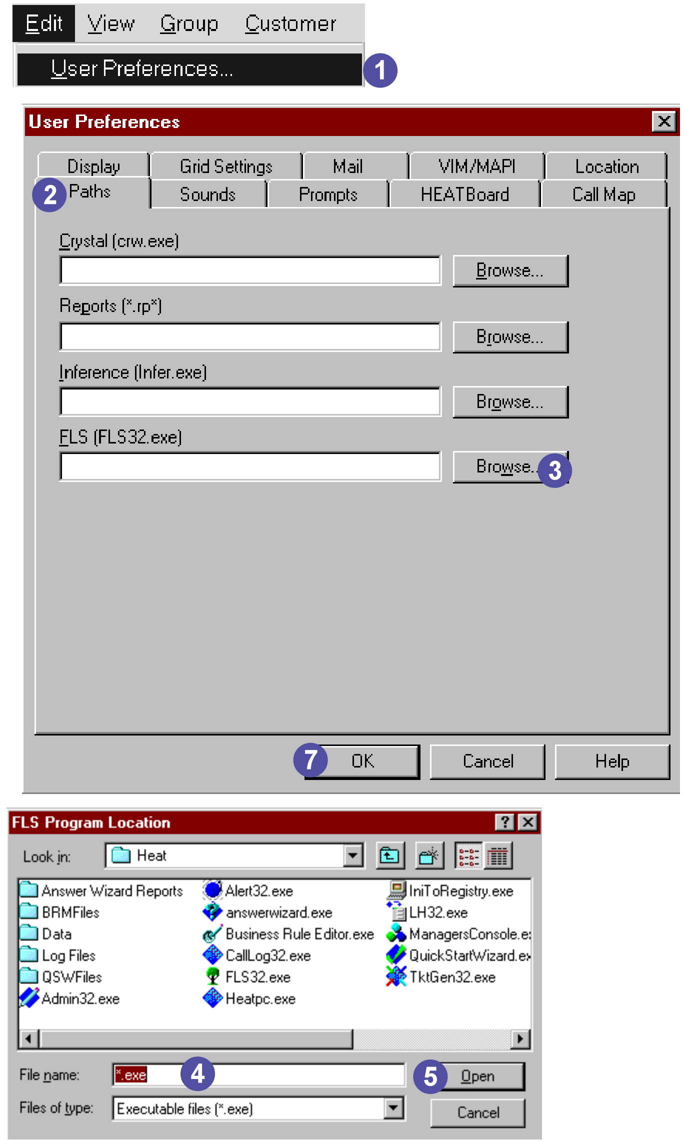
Setting Paths to Programs and Information

HEAT searches for the Crystal Report Writer application, its reports, and the Knowledge Base search engine in their assigned directories.

Use the same procedure to set each path. The example shows how to set a path to FLS.

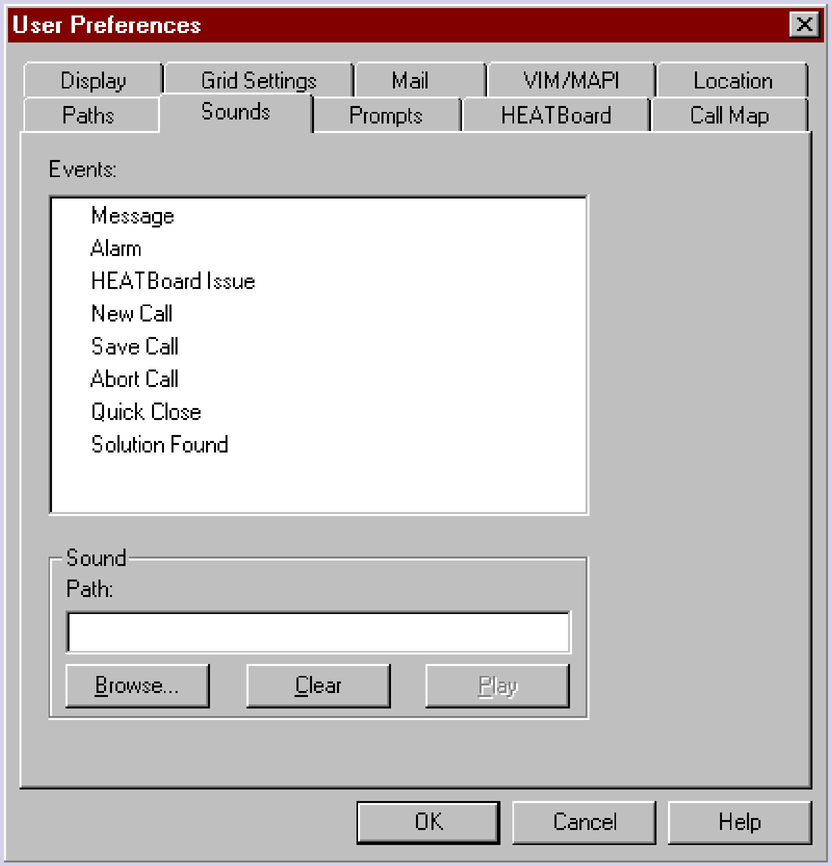
Set a Path

1. Select **User Preferences** from the **Edit** menu.
2. Click **Paths**.
3. Click **Browse** for the appropriate application.
4. Locate the **path** to the application.
5. Click **Open**.
6. Repeat steps 3-5 for each path.
7. Click **OK**.



The Sounds Tab

From the Sounds tab, set sounds to be associated with HEAT functions.



Setting Sounds

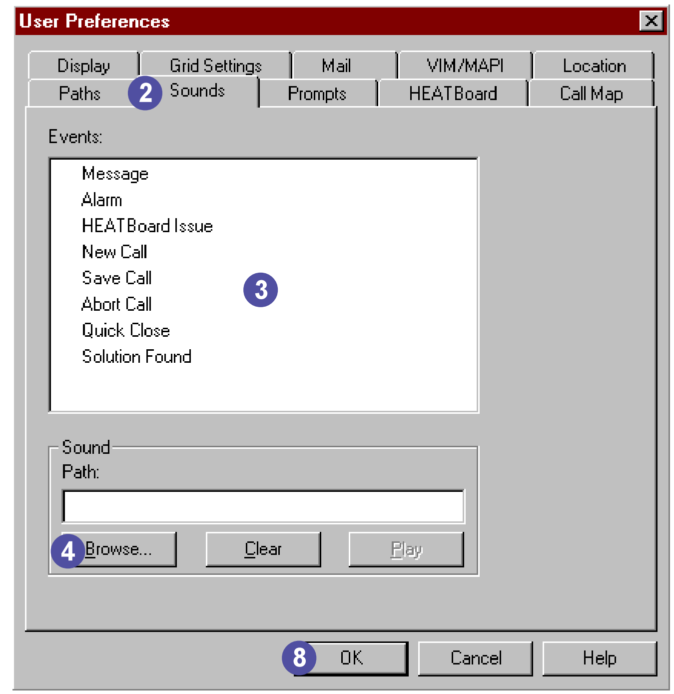
You can assign sounds to several HEAT tasks and functions. A sound can alert you or confirm that a task is done. You must have a sound card and speakers to play these sounds.

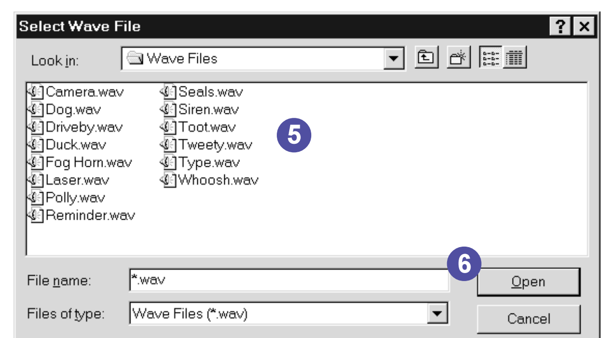
You can associate a sound with each of these events:

- **Message —** Incoming mail message.
- **Alarm —** Expired alarm.
- **HEATBoard Issue —** Issue has been posted to the IssueBoard
- **New Call —** Opening a new Call Record.
- **Save Call —** Saving a Call Record.
- **Abort Call —** Abandoning a Call Record.
- **Quick Close —** Quick-closing a Call Record.
- **Solution Found —** First Level Support finds a solution to the current problem.

Set a Sound

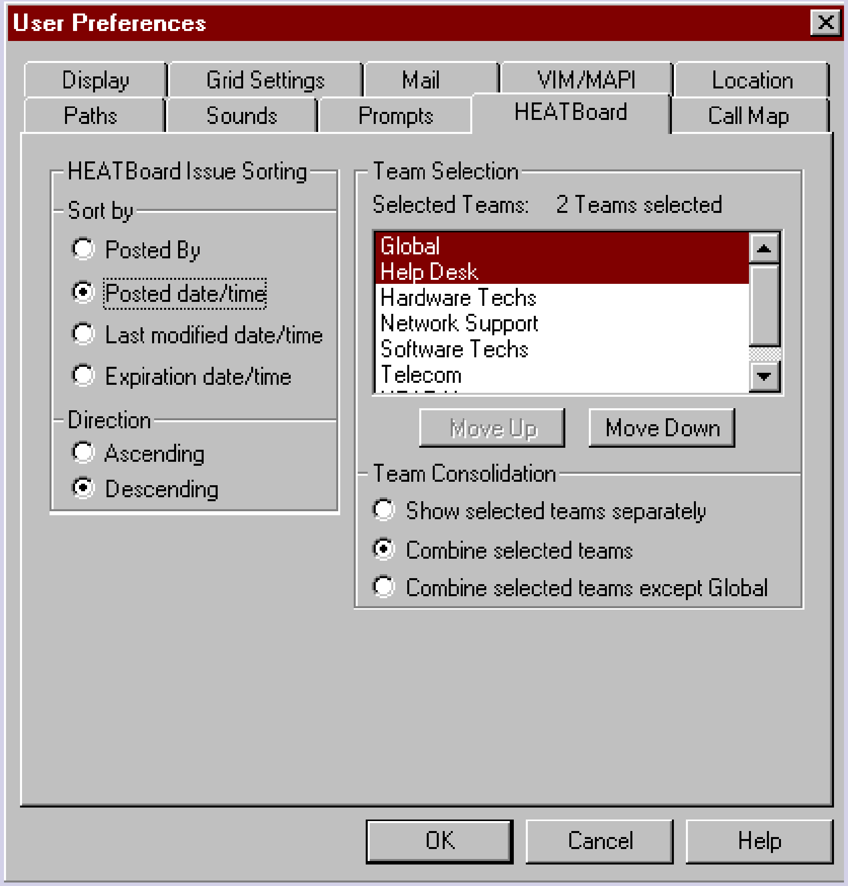
1. Select **User Preferences** from the **Edit** menu.
2. Click **Sounds**.
3. Click the **HEAT event** for which you want a sound.
4. Click **Browse**.
5. Select a **.wav** sound file.
6. Click **Open**. A speaker icon appears next to the event, indicating that the event has an associated sound.
7. Repeat steps 3-6 for each sound you want.
8. Click **OK**.





The HEATBoard Tab

From the HEATBoard tab, set HEATBoard Issue sorting options and HEATBoard teams.



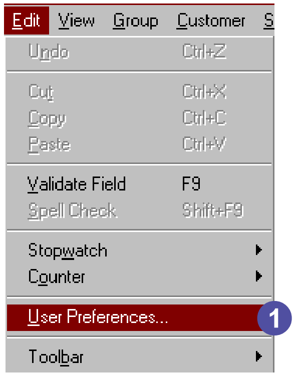
Sorting HEATBoard Issues

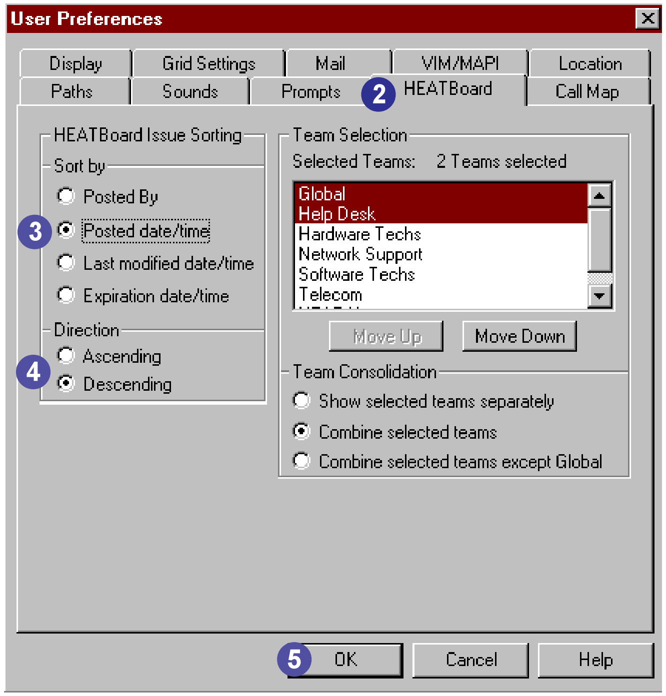
You can sort the issues displayed on the HEATBoard by:

- The person who posted the issue
- Posted date and time
- Date and time last modified
- Expiration date and time

Sort Issues

1. Select **User Preferences** from the **Edit** menu.
2. Click **HEATBoard.**
3. Click a **sorting criterion.**
4. Click a **sorting direction.**
5. Click **OK.**





Selecting IssueBoard Teams

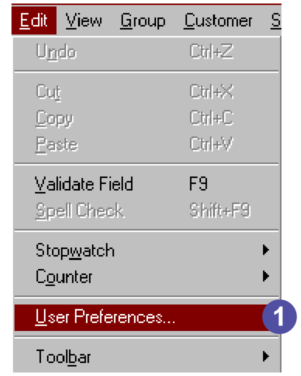
You can select the teams displayed on HEATBoard. By default, HEATBoard displays the teams of which you are a member.

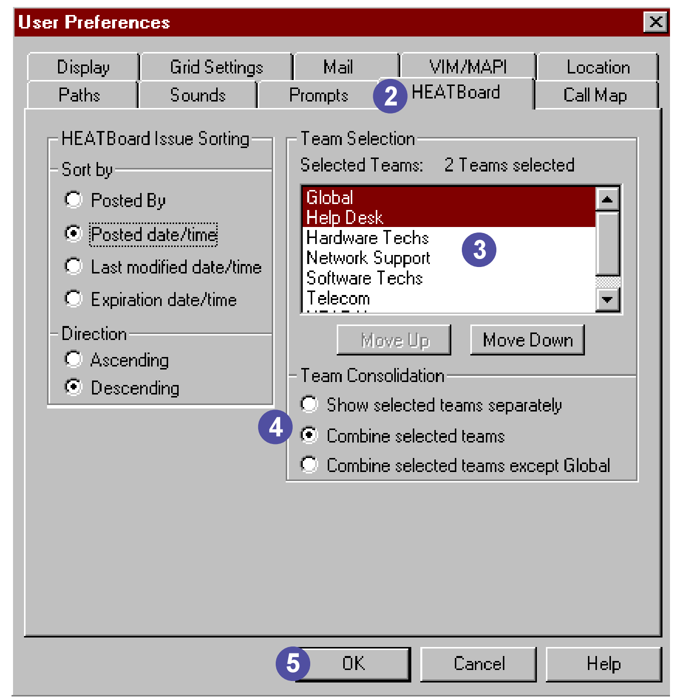
SEE ALSO

See Viewing HEATBoard Issues in "Call Logging," Chapter 2.

Select Teams

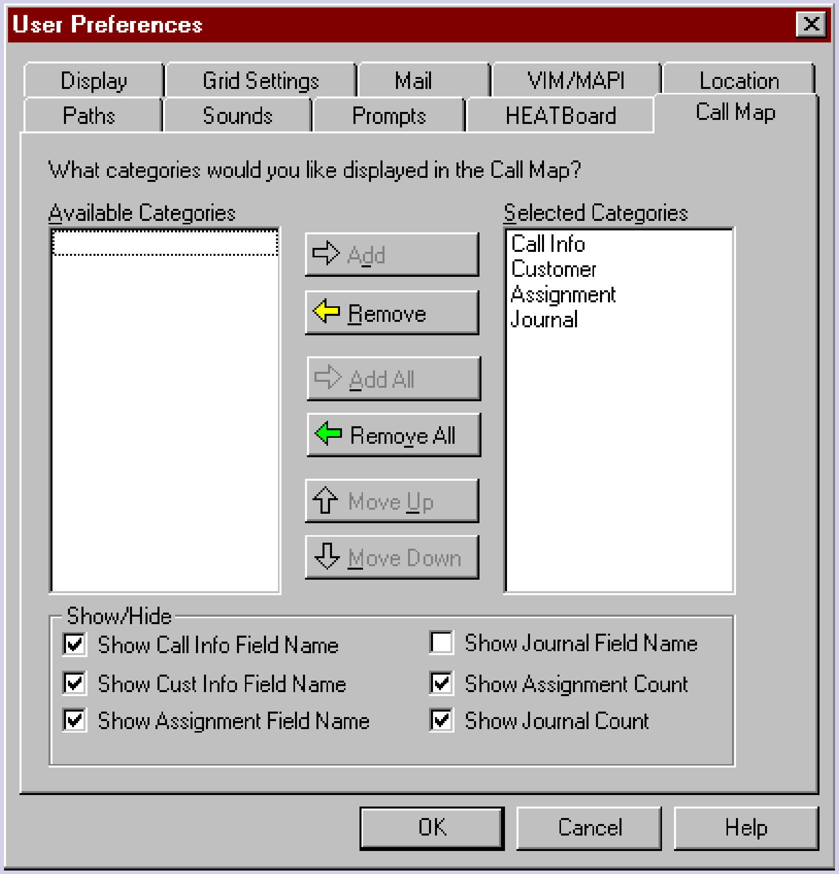
1. Select **User Preferences** from the **Edit** menu.
2. Click **HEATBoard.**
3. Select one or more teams. Click **Move Up** to move up the list. Click **Move Down** to move down the list.
4. Select a method of displaying team issues on the HEATBoard.
   - **Show selected teams separately** puts all issues pertaining to a team in a team bar.
   - **Combine selected teams** shows all issues in one bar.
   - **Combine selected teams except Global** shows all team issues in one bar, and all Global issues in a Global bar.
5. Click **OK**.





The Call Map Tab

From the Call Map tab, set the Call Map display and Call Map categories.

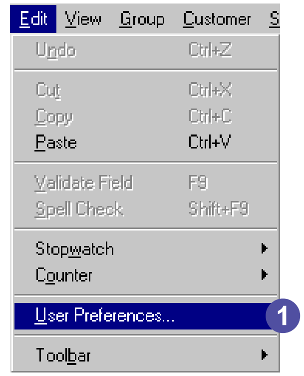


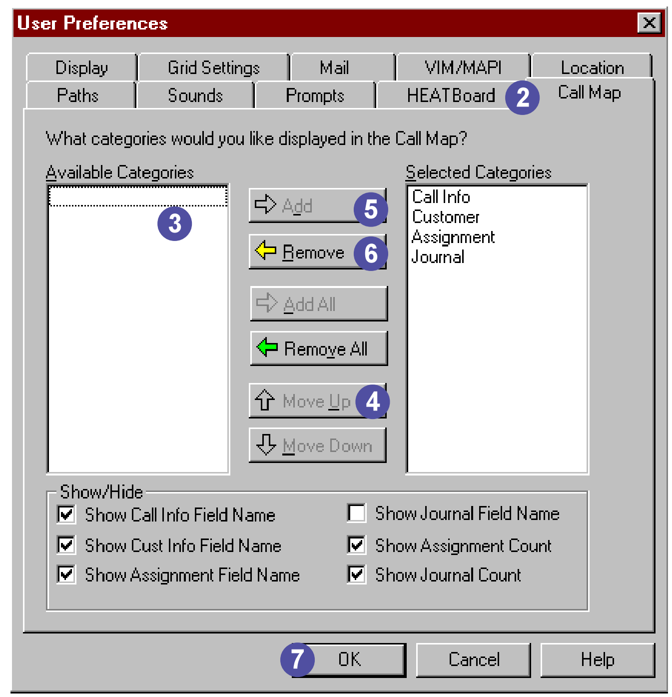
Setting Call Map Categories

You can set the categories displayed on the Call Map. The available categories are controlled by the system administrator.

Set Call Map Categories

1. Select **User Preferences** from the **Edit** menu.
2. Click **Call Map**.
3. Select an available **category**.
4. Click **Move Up** or **Move Down** to move the selected category higher or lower on the list.
5. Click **Add** to move the category from the **Available Categories** into the **Selected Categories** field for your Call Map.
6. Click **Remove** to remove a selected category from your Call Map to the **Available Categories** field.
7. Click **OK**.



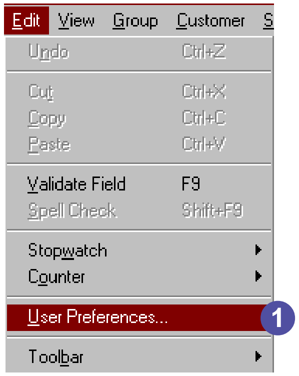


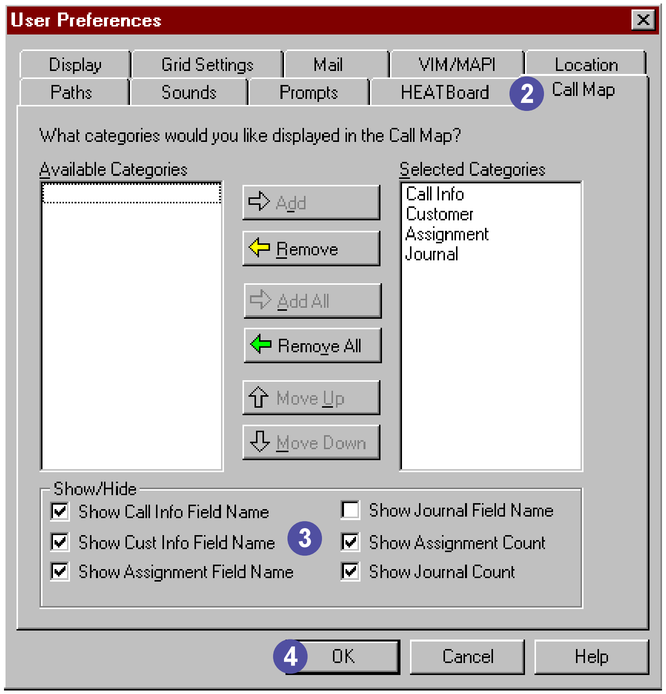
Setting the Call Map Display

You can set up the Call Map to display or hide fields such as names and call types. You can also set up the Call Map to display the number of journals.

Set the Call Map Display

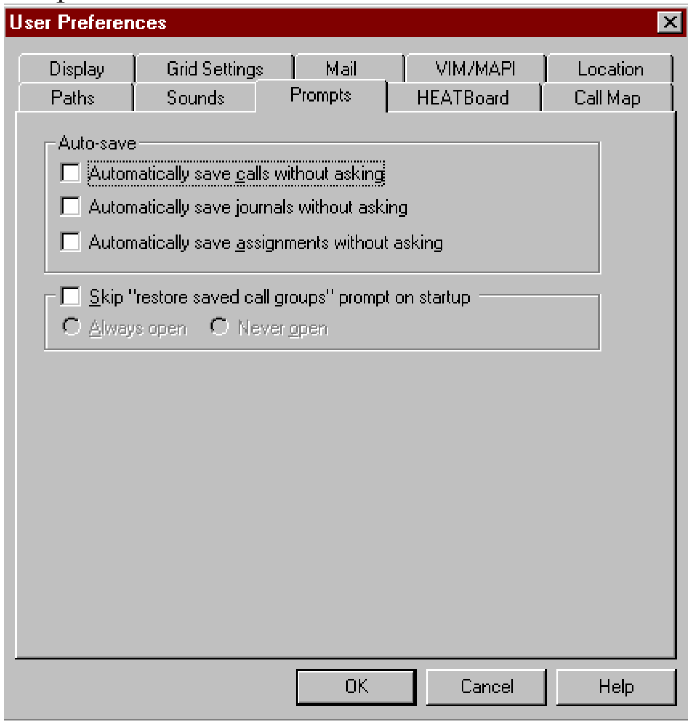
1. Select **User Preferences** from the **Edit** menu.
2. Click **Call Map**.
3. Choose what information to display in the Call Map by clicking the check boxes:
   - **Show Call Info Field Name** displays call information such as call type and status.
   - **Show Cust Info Field Name** displays customer info such as title and address.
   - **Show Assignment Field Name** displays assignments.
   - **Show Journal Field Name** displays journals.
   - **Show Assignment Count** displays the number of assignments available.
   - **Show Journal Count** displays the number of journals available.
4. Click **OK**.





The Prompts Tab

Use the Prompts tab to set preferences for prompts within the system. Set the preferences for saving calls, journals and assignments without asking or set the system to skip "restoring saved call groups" on startup.



Setting Prompt Options

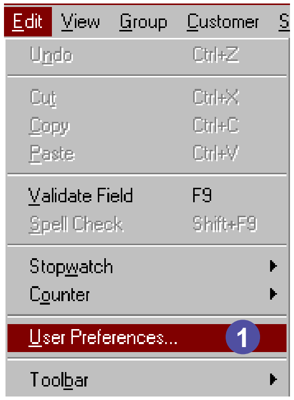
Use the Prompts tab in the User Preferences dialog box to define the prompts that Call Logging provides.

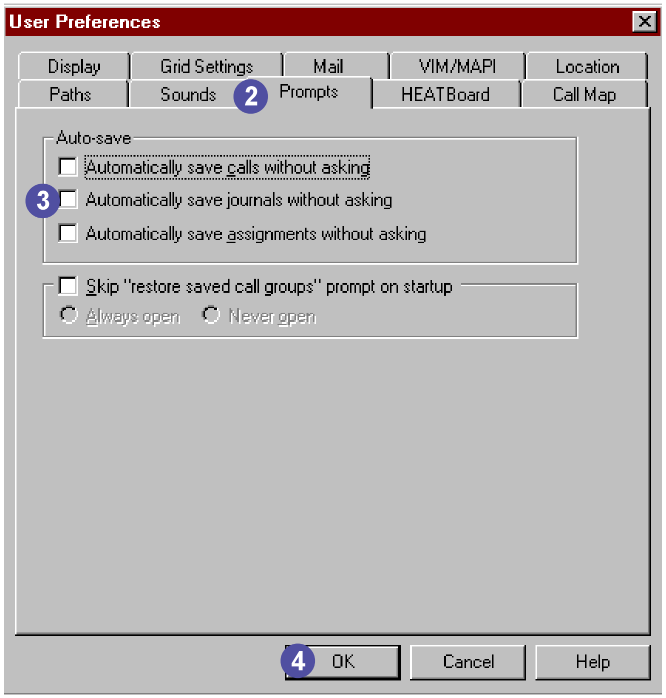
On this screen, you can define prompts to:

- Automatically save calls without asking.
- Automatically save journals without asking.
- Automatically save assignments without asking.
- Skip restore saved call groups prompt on startup.

Set the user prompts to repress

1. Select **User Preferences** from the Edit Meu.
2. Select the **Prompts tab** in the User Preferences dialog box.
3. Choose the **user prompts** that you would like to repress in the application.
4. Click **OK**.





Appendix A: Keyboard Shortcuts

Function Keys

Online Help	F1
Clear a date or time field	F2
Fill in System Date/Time	F3
Display Calendar in a date field	F4
Profile	F5
Switching Between Upper and Lower Panes	F6
Validations	F9
Quick Close	F10
SupportMail	F11
Alarms	Shift+F11
Autosize the Subset	F12
First Call	Shift+F7
Previous Call	F7
Next Call	F8
Last Call	Shift+F8

Navigation Keys

Call Log	Alt+1
Detail	Alt+2
Assignment	Alt+3
Journal	Alt+4
Current Call Information	Ctrl+Alt+C
Show InfoCenter	Ctrl+Alt+I
Go to Call Map	Ctrl+Alt+M
Go to HEATBoard	Ctrl+Alt+B
Moves cursor to next field	Tab
Move back one field	Shift+Tab
Moves Cursor within a field	← and →
Scrolls text in a memo field	↑ and ↓
Moves cursor one word to the left	Ctrl+←
Moves cursor one word to the right	Ctrl+→
Moves cursor to the beginning of the line	Home
Moves cursor to the end of the line	End
Moves cursor to the beginning of text field	Ctrl+Home
Moves cursor to the end of text field	Ctrl+End
Moves between call groups	Ctrl+Tab
First Assignment/Journal	Ctrl+Shift+PgUp
Previous Assignment/Journal	Ctrl+PgUp
Next Assignment/Journal	Ctrl+PgDn
Last Assignment/Journal	Ctrl+Shift+PgDn

Text Editing Keys

Deletes character to right	Delete
Deletes character to left	Backspace
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Undo	Ctrl+Z
Use Spell Checker	Shift+F9

Printing Shortcut Keys

Print	Ctrl+P
Print Active Call Group	Ctrl+Shift+P
Print by Call Type	Ctrl+Shift+B
Print Report	Ctrl+R

Mail Shortcut Keys

Reply to Sender	Ctrl+R
Forward Mail	Ctrl+F
Go to Attached Call	Ctrl+A
Broadcasts	Ctrl+B
Refresh Messages	Ctrl+E
Move	Ctrl+V
Copy	Ctrl+C

Other Shortcut Keys

New Assignment	Ctrl+A
New Journal	Ctrl+J
Displays the Call Record Browse Grid View	Ctrl+B
Refreshes the Active Call Group (except WorkGroup)	Ctrl+E
First Level Support	Ctrl+F
Perform a Search	Ctrl+Shift+S
Go to the Call ID	Ctrl+G
Put a Call on Hold	Ctrl+H
Lock Call Record	Ctrl+L
Add Call to My Hot List	Ctrl+M
New Call	Ctrl+N
Open an existing Call Group	Ctrl+O
Run Reports	Ctrl+Shift+R
Save	Ctrl+S
Switch Customer Types	Ctrl+T
Increment Counter Field	Numpad +
Decrement Counter Field	Numpad -

Appendix B:
Default Toolbar Buttons

Open New Call Record: Creates a new Call Record in the Call Log Screen.	CTRL+N
Abandon Changes: Closes the current Call Record without saving any of the information.	
Save Changes: Permanently records the information for the current Call Record.	CTRL+S
Quick Close: Closes the current Call Record and saves it immediately.	F10
Print Call Ticket: Prints the current Call Record.	CTRL+P
Validate Field: Opens a window which displays a list of legal values for the currently selected field.	F9
Run Spell Check: Checks spelling in the currently selected field.	SHIFT+F9
Cut: Cuts the selected information to the Clipboard, removing it from the field.	CTRL+X
Copy: Copies the selected information to the Clipboard.	CTRL+C
Paste: Inserts the information from the Clipboard into the currently selected field of the Call Record.	CTRL+V
New Call Group: Creates a new Call Group.	
Refresh Group: Adds calls that have been added to the database since the Call Group was opened.	CTRL+E
Open Call Group: Opens the Call Group selection window.	CTRL+O
Call Record Browse: Lists all calls in the current Call Group.	CTRL+B
First Call Record: Opens the first record of the active Call Group.	SHIFT+F7
Previous Call Record: Opens the previous record in the active Call Group.	F7
Next Call Record: Opens the next record in the active Call Group.	F8
Last Call Record: Opens the last record in the active Call Group.	SHIFT+F8
Customer Profile: Opens the Profile Record for the current customer.	F5
Customer Configuration: Opens the Configuration Record for the current customer.	
Show Caller History: Lists all calls for the current customer.	
First Level Support: Launches the First Level Support knowledge base.	CTRL+F
View Contacts: Lists all contacts for the current Call Record.	

@Functions

@Functions are fields that let you customize data based on variable criteria. For example, instead of using a new lookup for each Tracker, you can automatically use the current Tracker's ID.

How they work

The functions basically work by replacing the text of the function call with actual values before the SQL statement is sent to the ODBC data source.

@Function	Description	Available in
(@CurrentDate (in AutoTask) (@Date (in Boolean)	Inserts current date (from workstation clock)	AutoTask Boolean Search
(@CurrentTime (in AutoTask) (@Time (in Boolean)	Inserts current time (from workstation clock)	AutoTask Boolean Search
(@DateAdjust()	Inserts date adjustment (parameters defined by user)	AutoTask Boolean Search
(@DDERequest()	Inserts DDE request	AutoTask
(@MHTransferDate()	Returns the date the mobile unit was last synched	Boolean Search
(@MHTransferTime()	Returns the time the mobile unit was last synched	Boolean Search
(@NoAssignment()	Returns calls that have no assignments	Boolean Search
(@NoJournal()	Returns calls that have no journals	Boolean Search
(@Prompt()	Inserts prompt (prompt defined by user)	AutoTask Boolean Search
(@ReadFile()	Inserts the contents of a file (file defined by user)	AutoTask
(@TimeAdjust	Inserts time adjustment (parameters defined by user)	AutoTask Boolean Search
(@TrackerSupervisor	Inserts current tracker's supervisor	AutoTask
(@UnAcknowledgedAssignments-()	Returns calls that have unacknowledged assignments	Boolean Search
(@UnresolvedAssignments()	Returns calls that have unresolved assignments	Boolean Search
(@UserID()	Inserts current User's ID	AutoTask Boolean Search
(@ValidatedPrompt()	Inserts prompt that provides a list of values (validation information defined by user)	AutoTask Boolean Search

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Symbols

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