

VersaDev

Delivering Business Software Solutions

versaSRS HelpDesk Quick Start Guide

Version 4.0.0

Note: The reference terms and labels in this document may differ from your installation. If so, please change this document accordingly to suit your business purposes.

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


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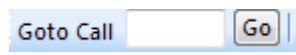
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



Useful Main Screen Icons

Primary Application Menu Icons

	Contact list
	Create a new Call
	Search
	Call load per person
	Refresh Call information










 Go directly to a Call

Case List Visual Icons

	Call is Locked by another Operator
	Action(s) Assigned to Call
	Email Update(s) to Call
	Call is linked to other Call (s)
	Attachment(s) exist against Call

Call Menu Function Tools

(Access by Right-Clicking on a Call)

	Details
	Update
	Reply
	Reply to Recent
	Reassign
	Watchers
	Link to child
	Printer Friendly
	Mark As Dead

Viewing Calls

- To view calls only assigned to yourself, select **View** from the drop down menu, then select **My Calls**
- To view call tasks only assigned to yourself, select **View** from the drop down menu, then select **My Tasks**
- To view all cases in a queue that you are a member of, select **View** from the drop down menu, then select the **Queue**
- To obtain a snapshot of your workload, select view from the drop down menu, then select **My Home**

Creating a New Call

Step 1: Click on the new call icon  on the **versaSRS main application screen**

Step 2: Complete the **Client Details** screen, following the steps below:

Select the customer details by clicking the **Contact List** icon .

The **primary requestor** is usually the person to whom the call relates.

The **secondary requestor** can be an interested party to the call.


Note: *It is not essential to enter secondary requestor details.*

After requestor details are accepted, the call details screen will default.

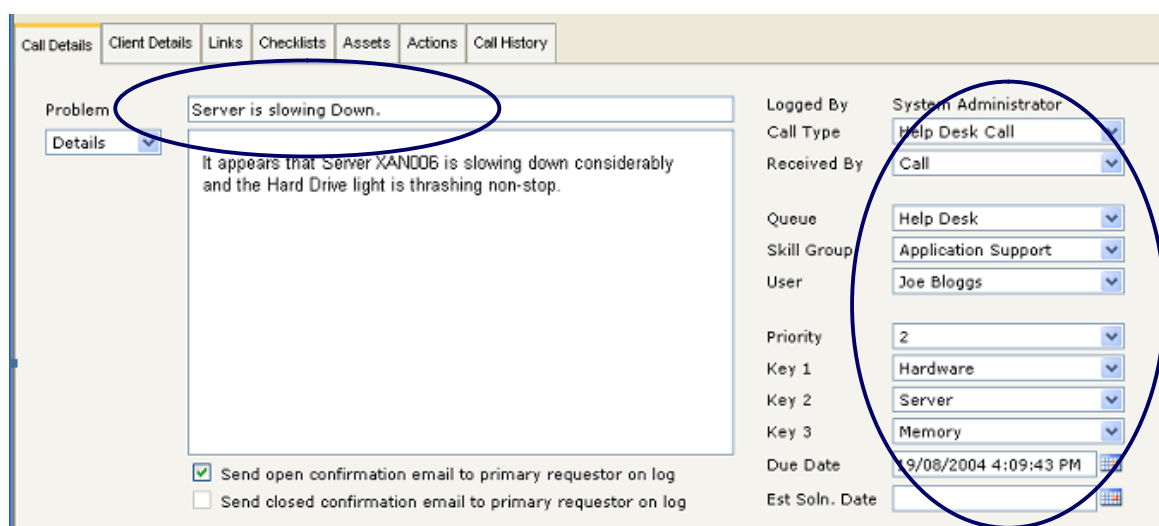
Step 3: Select the **Call Type, Received by, Queue, Skill Group** and **User**
The **User** field assigns the call to the person responsible to complete the work – could be yourself or another team member.

Step 4: Select the **Key 1, 2** and **3** fields (if applicable).

Step 5: Enter the **Problem** and **Details** of the call.

Step 6: Insert any relevant attachments. Click on the **Attachments** button .
Use the relevant attachment selection function to select the necessary file.
Attach the file by clicking on the **Add** button and select **Close**.

Step 7: To commit and save the Call, click on  **Save and Close**.
Note: *Remember to assign the call to a User, before clicking **Save and Close**.*




The **Call Details** area allows system users to record the request and assign the appropriate Call Type, Received By type, Queue, Skill Group and User who will be the owner of the call.

The **Key 1, Key 2, Key 3** fields allow you to build up Key Combinations which can assist with call logging and filtering in the main versaSRS Call Panel screen.

The **Due Date** field will be automatically calculated based on the Queue selected and the Priority; it can be manually overwritten by the operator if required.

Updating an existing call and sending an e-mail

Step 1: From the **versaSRS Main Application Screen** **Right-Click** on a Call then select the **Update** icon 

Step 2: On the **Update Screen** select an update type.  Update Type
You can choose from **Comments, Confidential Comments, Response to Requestors, Send Email, Resolve and Close, and Telephone Call**

Step 3: Enter your comments and details and press 

Step 4: If you wish to send an email select the update type of either **Response to Requestors** or **Send Email**
Optionally Click the Cc... and/or Bcc... buttons to add additional recipients

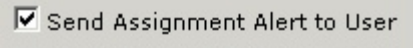
Step 5: Write your email and click .

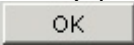
This e-mail and comments will be recorded and logged appropriately against the versaSRS call and is viewable via the Audit Logs at the bottom of the Call record screen.

Reassigning a call

Step 1: On the **versaSRS Main Application Screen** **Right-Click** on a Call then select the **Reassign** icon .

Step 2: Within the **Re-assign Screen** select the category and user to whom you wish to reassign the call.

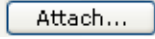
Step 3: Depending on your System Setup versaSRS may default to .

Step 4: Add any applicable Comments in the "Comments" box (optional) to send to the person you are reassigning the Call to then click  to commit the change.

Attaching files to an existing call within versaSRS

This function will be useful if you need to add word documents or other attachments after the call has been raised.

Step 1: On the **versaSRS Main Application Screen** **Right-Click** on a Call then select the **Update** icon .

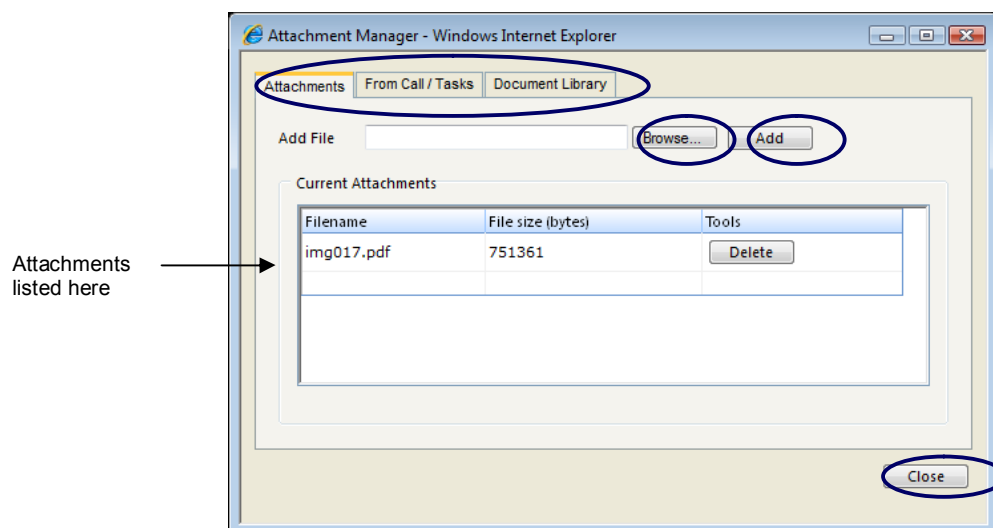
Step 2: On the **Update Screen** click on the **Attach ... button** . Use the **browse, From Call/Tasks** or **Document Library** function to select the appropriate file.

Step 3: Attach the file by clicking on the **Add** button.

Step 4: Select **Close** when you have completed the attachments.

Step 5: Select **Update** to update the call and return to the **versaSRS Main Application Screen**.

Note: Remember to click on the **Add** button. If the file name is not listed it means it has not been attached correctly. The above process can also be used to attach documents to an *Update* which is to be sent as an email.



Closing a Call

Step 1: On the **versaSRS home page** **Right-Click** on a Call then select the **Update** icon 

Step 2: Select **Update Type** **Resolve and Close** or use the "Status" option to define "Closed".

If you want to add comments to the notes field in the call details screen, type your notes and click ☒ **Add comments to Notes**

If you want to send an email to the primary requestor confirming the call is closed click ☒ **Send closed confirmation email**

Step 3: When you have completed the appropriate steps click "Update" or "Send" depending on the "Update Type" chosen.

Note: A call can be reopened and have its status changed after it has been closed – calls are never permanently closed, removed or deleted from versaSRS.

Searching for Calls


Step 1: Within the **versaSRS home page** is a **Call Search** window. If you cannot see this window, click on the Search icon. 

Step 2: In the **Search for** field, type your search word or words.
Narrow your search by selecting applicable Search criteria.

Step 3: Click on **Search**.

Your findings will be displayed below the Call Search window.

Case Search

Search for **Search Criteria** 




Using Date Field

Search within Start Date Day Month Year

Team End Date Day Month Year

Status

Page 1 of 1 [# Records: 3]

Tools	Case Number	Status	Priority	Due Date	Requestor(s)	Subject	Assigned To	Category	Logged By	Logged
	56914	Duplicate	2	16/02/2004 1:12:00 PM	Frances Lata Frances Lata	TEST	Frances Lata	Intranet	Frances Lata	09/02/2004 10:15:13 AM
	56999	Duplicate	4	27/02/2004 3:15:00 PM	Stacey Savranaki Luc Dierickx	Test for Web CoP	Frances Lata	Extranet	Frances Lata	10/02/2004 12:18:56 PM
	57020	Duplicate	3	23/02/2004 1:48:00 PM	Frances Lata	40 hours work due by Friday	Andrew Hunt	Intranet	Frances Lata	10/02/2004 2:58:10 PM

System Menu Bar & Tool Bar

Menu bar



The versaSRS HelpDesk menu options consist of **File, Tools, View, Administrator** and **Help**. Clicking these will display sub menu options, many of which are also available within the Toolbar.

Toolbar

This is displayed directly underneath the versaSRS HelpDesk menu bar and has the following buttons:



New Browser Window – enables you to access the Internet within a new Internet Explorer window.



Web Mail – Site Configurable option to access Webmail.



Events - displays in the lower half of the screen a "Events view" which alerts versaSRS HelpDesk users of any key Events. In addition this area could display planned and unplanned system down times and general points of interest.



Knowledge Base – enables you to search for documentation and information that may assist in problem resolution.



Contacts – gives access to contact information for internal &/or external requestors.



Hot News Board – displays in the lower half of the screen a "bulletin board" which alerts versaSRS HelpDesk users of any problems and their solutions. In addition this area could display planned and unplanned system down times and general points of interest.

When publishing information to Hot News you are able to specify the duration of its display.



HTML Editor - can be used in conjunction with the Knowledge Base when entering formatted text.



New Call – enables a new call to be logged into versaSRS HelpDesk. Please refer to the section entitled 'Logging a New Call' for further information.



Show / Hide Call Search – displays in the lower half of the screen search capabilities for all calls. Please refer to the section entitled 'Searching for Calls' for further information.



Refresh Calls – refreshes all the calls for the queue you are currently viewing. All screens will automatically refresh every few minutes. When you make changes to call information and wish to view these changes, you can manually refresh using this button or by pressing **F5**.



Please be aware that this will display the 'top level' of the Queue you are viewing and you may need to re-select the particular area you were viewing prior to the manual refresh. Automatic refreshing will leave you in your current position.

Queue Filtering

At the left-hand side of the versaSRS HelpDesk main screen all the Skill Groups and Users will be listed for the Queue you are viewing.

Clicking on a Skill Group or specific User will show all the calls assigned to that particular area.

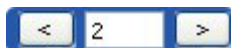
- Numbering beside a user identifies the number of calls assigned to that individual. For example, **(green)**.
- The numbers beside the Queue detail the total number of calls in the queue, for example **(red)**, and the total number of calls that have not been assigned to users **(blue)**, plus the number of unread emails **(purple)**.

When viewing filtered information, the system will automatically refresh the screen every so often to ensure you are viewing the latest information.

If you manually refresh by pressing **F5** or clicking the **Refresh** button, you will taken to the top level of the queue not to the skill group or user information you were previously viewing.



When many calls are listed they will be separated into 'pages'. The top right-hand corner of the screen will display the current page and show directional arrow buttons that enable to display the previous and next pages. The number of calls per page is defined by the Database Application Settings and can be changed through the versaSRS-SMC.



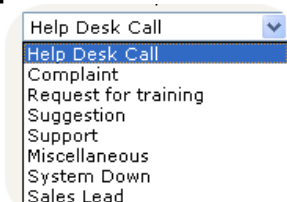
Call Details Screen

When logging calls the following fields are available for completion. To ensure you fill as many of the relevant fields as possible, refer to this section for guidance on the details required for each specific field:

Problem (mandatory field)

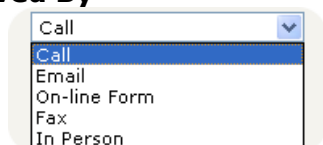
Brief description of the problem/request. This information is displayed on the main versaSRS HelpDesk screen and sent, as the Subject heading of an e-mail, to the Requestor/s when the call is successfully logged.

Call Type

A screenshot of a dropdown menu for 'Call Type'. The menu is open, showing a list of options: 'Help Desk Call' (selected), 'Complaint', 'Request for training', 'Suggestion', 'Support', 'Miscellaneous', 'System Down', and 'Sales Lead'.

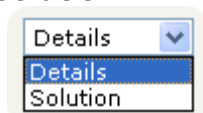
For you to allocate what type of problem/request has been made. Clicking the drop down button will display the options available. The Call Type List, as with all drop-down lists in versaSRS HelpDesk, can be configured via the *Administrator > System Tools > Manage System Tables* menu option.

Received By

A screenshot of a dropdown menu for 'Received By'. The menu is open, showing a list of options: 'Call' (selected), 'Email', 'On-line Form', 'Fax', and 'In Person'.

For you to allocate how the problem/request was placed by the Requestor. Clicking the drop down button will display the options available.

Details / Solution

A screenshot of a dropdown menu for 'Details / Solution'. The menu is open, showing a list of options: 'Details' (selected) and 'Solution'.

This field is for a more in-depth explanation of the problem/request &/or solution. Please provide as much detail as possible. This information can be enhanced by copying and pasting information or screen dumps of error messages. This area can be toggled between Details & Solution by the drop down selector.

The drop down options enables you to indicate if the problem was:

- 1 resolved over the phone when the call was being logged, or that
- 2 an interim measure has been made (workaround), or that
- 3 the problem is still outstanding and unresolved.



If resolving the call at the initial logging stage, please refer to the section entitled Logging and Closing a Call at the Same Time.



This button, located near the top of the Call Details panel, will give you access to the **Knowledge Base** and enable you to search on past problem resolutions using keywords – it will allow you to insert the knowledge base article or link into the solution field.

Attachments (button)

This enables you to attach files to the call. Please refer to the section entitled 'Working with Call Attachments' for further information.

Send open confirmation email to primary requestor on log

Placing a tick in this field will confirm, via e-mail to the Requestor/s, that a call has been logged. The e-mail will include the unique call number, and any other information you require based on the Queue templates that have been configured.

Call Details Screen (cont)

Send closed confirmation email to primary requestor on log

Placing a tick in this field will send, via e-mail to the Requestor/s, that a call has been closed. The e-mail will include the unique call number, and any other information you require based on the Queue templates that have been configured.

Queue

This enables a call to be allocated to a specific queue. Each user will have the default option displayed and calls can be assigned to different queues if necessary.



Once a call has been logged, this field can only be modified when in View mode or when using the Reassign button.

Skill Group

A Skill Group cannot be allocated prior to the Queue being selected. Each Queue can have different &/or similar Skill Groups. If you are unsure of the most relevant skill group, and want the Queue Watcher to delegate, do not complete this field.

User

A User cannot be allocated prior to the Queue and Skill Group being selected. Each Skill Group can contain different users.

Priority

This is the priority allocated to the call/problem. Default settings may automatically apply, for example a Help Desk default priority may be 2 (24-hours). When the priority has been allocated the **Due Date** field will be calculated accordingly.

Keys 1, 2 & 3

These fields enable you to further classify a call/problem by allocating categories. When the Key 1 field is completed, relevant options will be available within Key 2. Similarly when the Key 2 field is completed, Key 3 will display relevant options.

This information can assist the searching and reporting facilities within versaSRS HelpDesk. Please refer to the section entitled 'Updating a call'.

Due Date

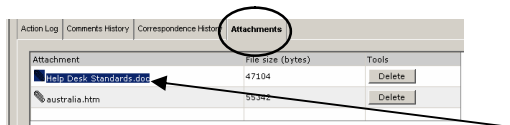
This field is automatically calculated when you assign a Priority but can be modified by clicking the Calendar Icon to the right of the Due Date field

Est Soln. Date

Optional - When you are able to estimate a Solution date, which may be different to the Due Date, use the Calendar Icon to the right of the Due Date field to set the date

Working with call attachments

Viewing files attached to logged calls



Any attachments can be stored with call information and can be listed when viewing that call. Attachments can be viewed and removed from the same screen.

- 1 View the relevant call information.
- 2 Click the **Attachments** tab to list all files attached.
- 3 Click on the hyperlink to view the file.



If a file is attached to a call and removed from the Network, it will still remain with the logged call (all attachments are stored in the versaSRS HelpDesk database).

Attaching a file to a previously logged call



- 1 Ensure you are **updating** the call information. Please refer to the section entitled 'Updating a Logged Call' for further information.
- 2 Click the **Attachment** Icon to display the Attachment Manager screen, or click the Attach ... button on the Update Screen.
- 3 Click the **Browse...** button or select an attachment already stored against the call, or a document stored in the Document Library.
- 4 Navigate to the relevant drive and folder where the file you wish to attach is stored.
- 5 Double click on the file you wish to attach. The filename will appear in the Add File field.
- 6 Click the **Add** button and the filename will be added to the **Current Attachments** area.
- 7 Click **Close** to return to the Update Call screen.
- 8 Click **Update** button at the top left of the Update screen to return to the main screen.


Working with call attachments (cont)

Attaching a file when logging a call



- 1 To display the relevant screen, click the **New Call** button.
- 2 Complete all the relevant fields as necessary.
- 3 Click the **Attachments** button.
- 4 The Attachment Manager screen will be displayed.
- 5 Click the **Browse...** button or select an attachment already stored against the call, or a document in the Document Library.
- 6 Navigate to the relevant drive and folder where the file you wish to attach is stored.
- 7 Double click on the file you wish to attach.

The filename will appear in the Add File field.

- 8 Click the **Add** button and the filename will be added to the **Current Attachments** area.
 - If you have added an incorrect file, the **Delete** button can be clicked to remove it.
 - You can attach multiple files if required.
- 9 Click **Close** to return to the Call Details screen.
- 10 Ensure all required fields are completed
- 11 Click the  **Save and Close** icon to log the call.

Support & Help Resources

Online Help	http://www.versadev.com/support/versasrs/online_help/
Knowledge Base	http://www.versadev.com/knowledgebasehome.aspx
FAQ	http://www.versadev.com/knowledgebasefaq.aspx
Screencasts & Video Demonstrations	http://www.versadev.com/kbview.aspx?kbaid=174
Forums	http://www.versadev.com/forums

Accessing Software Demonstration Screencasts via versaSRS HelpDesk

A wide range of Screencasts and Demonstrations, including interactive demonstrations, can also be directly accessed directly from within the application by clicking the '**Video Demonstrations**' button - located at the bottom-left of the application interface.

These Video Demonstrations graphically highlight and walk through much of the system setup, management and overall usage of versaSRS HelpDesk.

The Video Demonstration may also prove useful as a means of providing quick and easy training to your staff

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