Evaluator's Guide

PC-Duo Enterprise HelpDesk v5.0

Getting Started

Logging On

Enterprise HelpDesk supports integration with Windows NT and Active Directory domains, and can be set up to authenticate users using their Windows credentials. This means that users can skip the logon screen. However, during evaluation you most likely will have to log on using a Enterprise HelpDesk account.

To log on to Enterprise HelpDesk, you need a user account, which consists of a user name (sometimes called a logon name) and an optional password. Enterprise HelpDesk includes several default user accounts that you can use to log on:

admin Has full administrative privileges. Password = admin.

demo Has full administrative privileges. No password.

guest Has limited privileges. No password.

analyst, group leader, employee Role-based accounts with different user permissions. Used to demonstrate the issue-tracking workflow of Enterprise HelpDesk. No passwords.

To log on:

1. Start your Web browser and go to the Web view logon page (typically **http://server/HelpDeskServer**, where **server** is the computer name of your Web server).

   To log on to the default Web views: on the **Start** menu, click **Programs > PC-Duo Enterprise > HelpDesk** > **HelpDesk Web.**
2. In the **Logon Name** box, type a user name.
3. In the **Password** box, type the password.
4. Click **Log On**.

   After you log on, you will see a list of projects (in bold) and Web views (hyperlinks). Access to Web views is controlled by user permissions, so you see only the Web views you have permission to open.
5. Click the Web view you want to open.

What's a Project?

An Enterprise HelpDesk project includes a database of issues, and a set of definitions (such as queries, reports, and notifications) that work with the issue database.

Enterprise HelpDesk includes a sample help desk project called HelpDesk.

What's a Web View?

Enterprise HelpDesk provides Web-based views of Enterprise HelpDesk projects.

With Web views, you can provide separate views for employees and for help desk staff. Each view is accessed through the same Web-based interface. Different views expose different queries and fields to users.

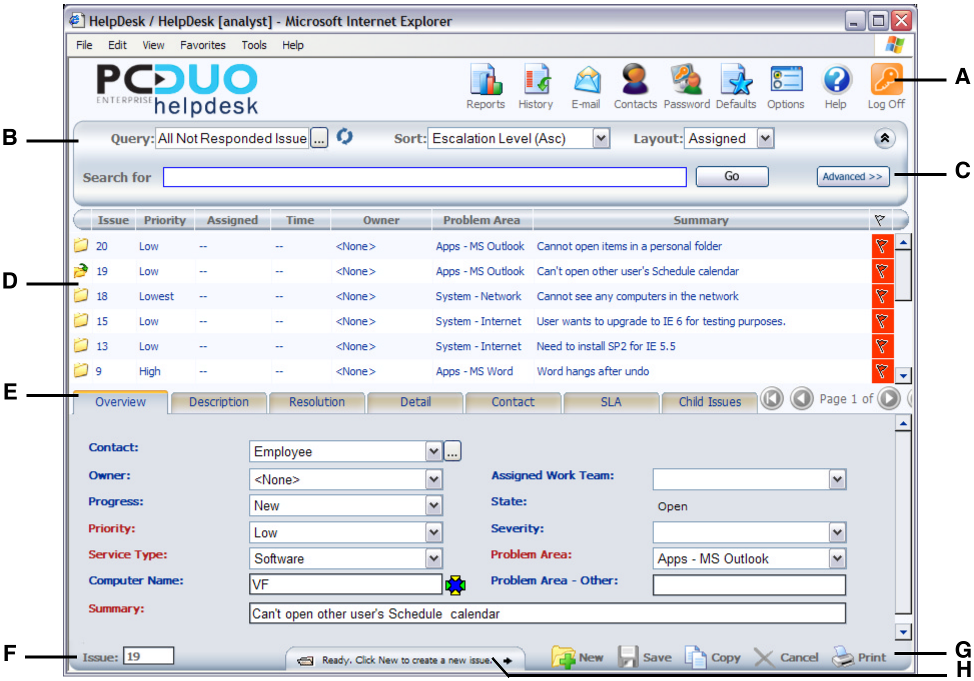
- Queries determine what issues users can retrieve from the project database.

  For example, employees who are not part of the help desk don't need to see all the issues in the project database, just the issues they submitted.

- Fields determine what information users can see and edit.

  For example, employees don't need to see the fields used by help desk staff for tracking and resolving issues.

Visual Tour of a Web View



A. The buttons in the view toolbar allow you to exit the Web view, get help, and set options. Depending on your user permissions, there may also be buttons for generating reports, reviewing the revision history of an issue, adding contacts, changing your password, setting default values, and sending e-mail.

B. Run predefined queries, sort the Summary List (see callout **D**), and change the layout (columns) of the **Summary List**.

C. The **Simple Search** bar allows you to quickly search issues for text. Click **Advanced** to build more complex ad-hoc queries.

D. The **Summary List** displays all the issues found by the current query. To load an issue, click any of the text on a row.

E. This tabbed form displays the details of an issue. Required fields are highlighted in dark red.

F. Shows the ID of the issue currently loaded into the form. To load an issue from the **Summary List**, type the number and press ENTER.

G. Create a new issue, save or cancel changes to the current issue, copy the current issue, and print the current issue.

H. Indicates the current status of the form (for example: editing, ready to create new, or loading data).

Click to refresh the Summary List.

Click to show more of the Summary List.

Click to show more of the issue details.

Click to page through the Summary List.

About the Default HelpDesk Views

HelpDesk Shows all issues and issue information, and is intended for use by help desk staff. Enforces workflow rules and defines an issue lifecycle.

Employee Shows only the issues and information submitted to the help desk by the employee. Internal notes and information added by help desk staff is hidden. Allows employees to submit new issues and check the status of existing issues.

Exiting a Web View

Web views are applications, not simple Web pages. Exiting by closing the browser window can leave database connections open and will not free your license. The connection will eventually time out, but until then you (and other users) may not be able to log on.

To exit:

In the Web view toolbar (the buttons displayed at the top of a Web view), click **Log Off** .

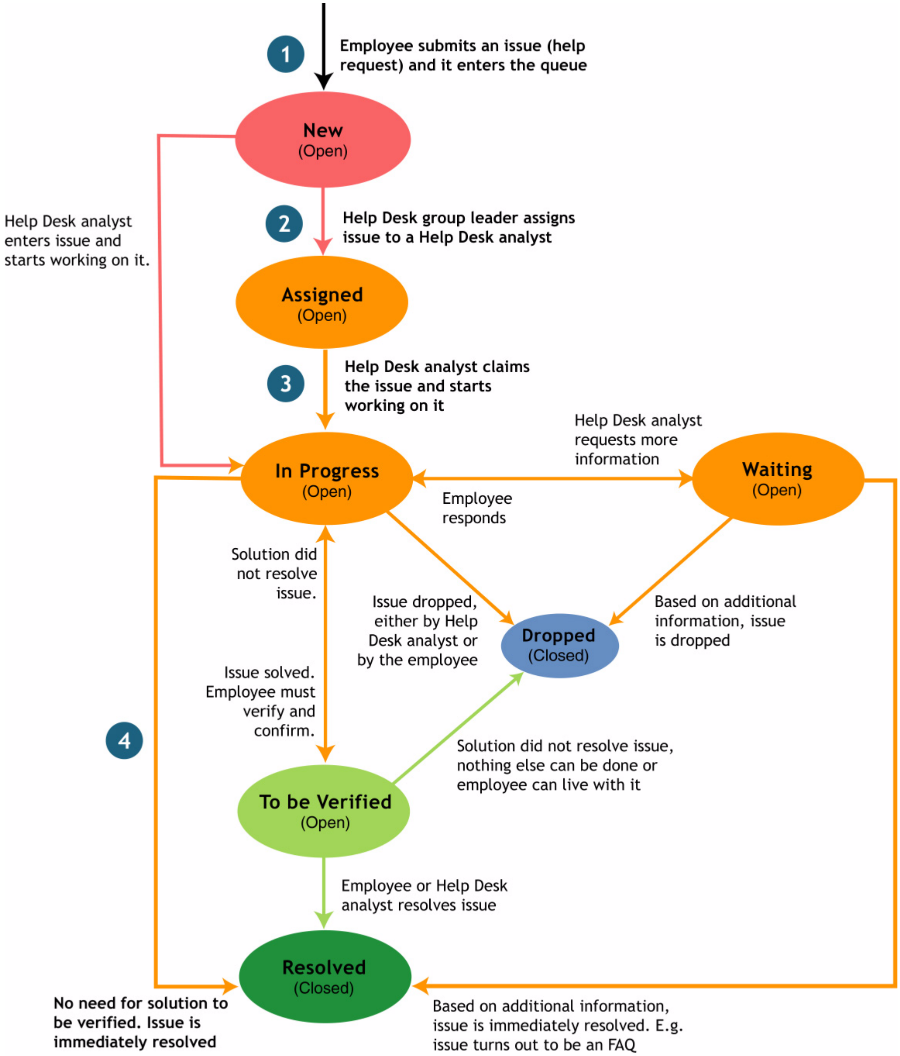
Issue Tracking: Roles and Workflow

This section walks you through the workflow of recording, tracking, and resolving an issue. By logging on as a different user (employee, help desk analyst, or help desk group leader) at each step of the process, you'll learn about the different role each user plays in a help desk workflow. You'll also see how different views are customized for different users, and how workflow rules are enforced.

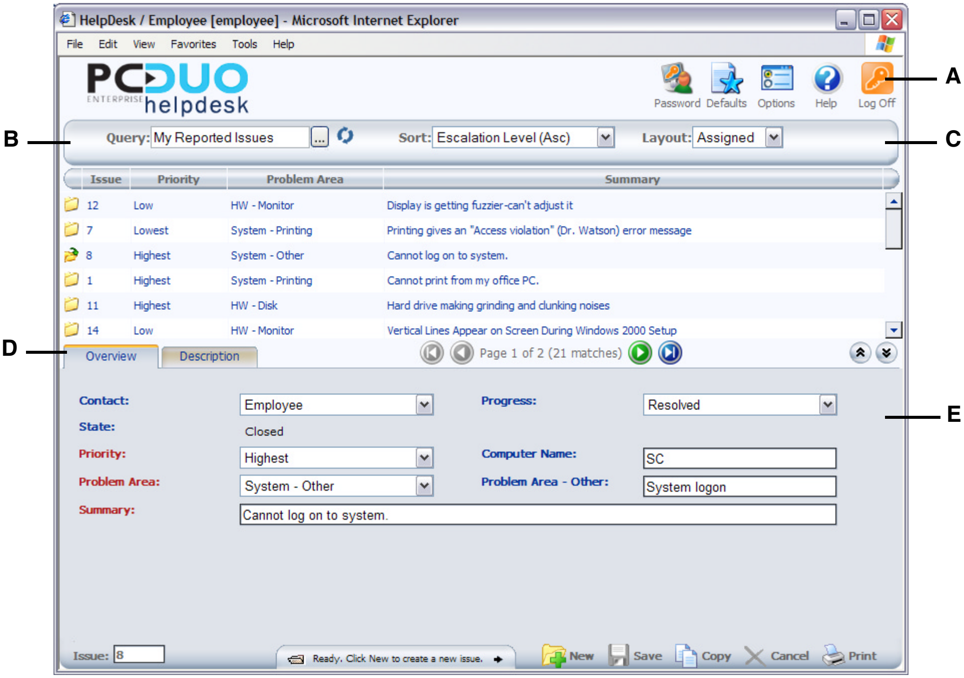
The diagram on the next page shows the complete default workflow. In this walkthrough, we'll take a basic, four step path:
New > Assigned > In Progress > Resolved

You can customize the default workflow using the workflow editor in HelpDesk Web Admin.

Help desk roles and workflow



Employee View The Employee view is designed for reporting problems.



A. There are no **Reports**, **History**, or **Contact** buttons in the toolbar. Employees don't need these features to report problems.

B. The **Query** list includes only one query: **My Reported Issues**. Employees can see only the problems they reported.

C. No ad-hoc query editor.

D. There are only two tabs, because employees don't need to fill in the **Resolution** or **Detail** information, and they don't need to see the **Contact**, **Inventory**, or **SLA** information.

E. There's no **Owner** field on the **Overview** tab, because employees don't assign issues.

Step 1: Employee Reports a Problem

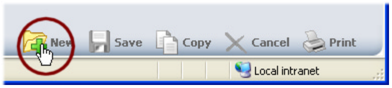
Log on to the Employee view:

1 Log on to Enterprise HelpDesk as **employee**. Open the **HelpDesk - Employee** view.

2 Take a minute to look over the Web view. You should notice a few differences from the view we looked at in “Visual Tour of a Web View” on page 5.

Report a problem:

1 Click **New** to open a new issue.



2 Enter some information about the problem you want to report. For example, suppose you cannot print a PDF file.

a In the **Priority** list, click **ASAP**.

b In the **Problem Area** list, click **System - Printing**.

c In the **Summary** box, type “Can’t print a PDF file”.

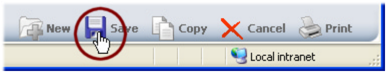
d Click the **Description** tab, and then in the **Description** box, type a more detailed description of the problem:

“Tried to print a PDF file from IE and from the Reader, but the job just sat in the queue.”

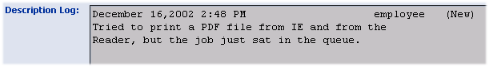
3 Click the **Progress** list. Note that it contains only one choice: **New**.

Employees are not allowed to change **Progress** from **New** to any other value. This is part of the default workflow, which controls how an issue progresses through the help desk process.

4 Click **Save** , and click **OK** when you are asked if want to save your changes.



When you save the issue, the text you typed in the **Description** box is automatically stamped with time and date information and moved to the **Description Log** box.



5 Click **Exit** to exit the **Employee** view.

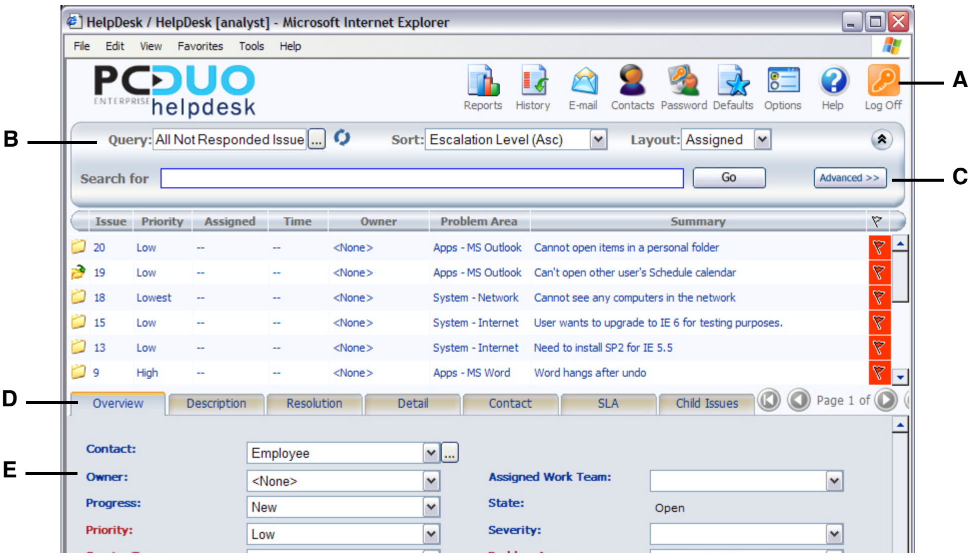
Step 2: Group Leader Assigns the Issue

Log on to the HelpDesk view:

1 Log on to Enterprise HelpDesk as **group leader**. Open the **HelpDesk - HelpDesk** Web view.

2 Take a minute to look over the Web view. You should notice a few differences between this view and the Employee view.

HelpDesk View The HelpDesk View is a detailed view designed for use by help desk staff.



A. The **Reports**, **History**, and **Contact** buttons are available.

B. The **Query** list includes a variety of queries.

C. The **Query Editor** is available.

D. The **Resolution**, **Detail**, **Contact**, **Inventory, SLA**, and **Child Issues** tabs are available.

E. The **Owner** field is present on the **Overview** tab.

Check for new issues:

After you log on, you need to select the appropriate query, sort, and layout so the **Summary List** shows you the information you need (in this case, information about new, unassigned issues).

Each time you log on, Enterprise HelpDesk restores the same query, sort, and layout you used the last time. So in practice, you don't always have to select a query, sort, and layout.

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1 Click in the **Query** box, or click . In the **Queries** dialog box, double-click **All Unassigned Issues** to list all issues where Owner = <None>.

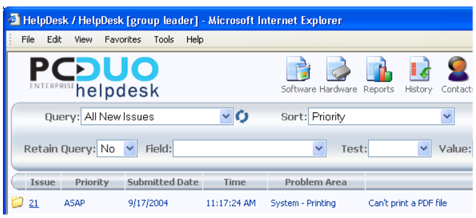
You could also use the **All New Issues** query to list all issues with Progress = New.

2 In the **Sort** list, click **Priority** to list the new issues in ascending order by priority.

3 In the **Layout** list, click **New**.

The **New** layout displays relevant information for new, unassigned issues. In contrast, the **Assigned** layout (which is the default layout) displays information (such as the assigned date and owner) that is relevant only for issues that are actually assigned to somebody.

You should now see the "Can't print a PDF file." issue at the top of the **Summary List**.



4 In the **Summary List**, click the issue number of the "Can't print a PDF file." issue.

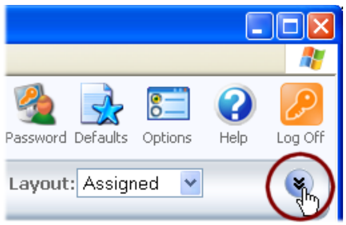
The issue details are loaded into the form at the bottom of the window.

5 Review the problem description (in the **Description Log** field).

Search for resolved issues related to printing:

Before assigning the issue to an analyst, you can check for similar problems that were resolved. It may be that this printing problem occurs frequently and there is a well-known solution.

1 Internet Explorer only: Click to show the query editor.



The simple query editor performs a text-based search of most fields. However, we want to build a slightly more complex query that searchs only the Brief Description field.

2 In the **Field** list, click **Resolution**.

The **Resolution** field contains a description of how a problem was resolved.

3 In the **Test** list, click **Contains**.

4 In the **Value** list, type "print" (without the quotation marks).

5 Press **Enter** or click to start the search.

6 If you don't see what you want in the search results, you can try expanding the search. In the **Retain Query** list, click **Or**.

Or combines the previous query (Resolution contains “print”) with a second ad-hoc query.

7. Create an ad-hoc query that searches for issues where the **Resolution** field contains the string “PDF”.

8. Press **Enter** to start the search, or click .

   The **Summary List** will list all issues that match this query:

```
(Resolution Contains "print")
OR
(Resolution Contains "PDF")
```

Queries are case-insensitive, so you can search for either “pdf” or “PDF”.

Assign the issue to an analyst:

You assign an issue by clicking an analyst’s name in the **Owner** list. After you set the owner, you mark the issue **Assigned** in the **Progress** list.

1. Return to the list of unassigned issues by running the **All Unassigned Issues** query.

2. Find the “Can’t print a PDF file.” issue and load it into the form.

3. In the **Owner** list, click **Help Desk Analyst**.

4. In the **Progress** list, click **Assigned**.

   Note that the **Progress** list contains only **New**, **In Progress**, and **Assigned**. A group leader can change the **Progress** from **New** to **In Progress** or **Assigned**, but not to any other value (for example, **Resolved**). This is part of the default workflow.

5. Click **Save**.

   Note that now the **Progress** list contains only one choice: **Assigned**. Only a help desk analyst (or an administrator) can move an issue from the **Assigned** state.

Exit the view:

- Click **Exit** to exit the **HelpDesk** view.

Step 3: Analyst Works on the Problem

While an issue is marked **Assigned**, it is waiting to be claimed by a help desk analyst. An analyst claims an issue by marking it **In Progress**, which indicates that the analyst is working on the problem.

Log on and check for new issues assigned to you:

1. Log on to Enterprise HelpDesk as **analyst**. Open the **Bugs- Development** Web view.

2. Click in the **Query** box, or click . In the **Query** list, click **My Assigned Issues** to list the issues assigned to you that are marked **Assigned**.

3. In the **Sort** list, click **Priority** to list the new issues in ascending order by priority.

   You should now see the “Can’t print a PDF file.” issue at the top of the **Summary List**.

4. In the **Layout** list, click **New**.

Start work on the issue:

1. In the **Summary List**, click the issue number of the “Can’t print a PDF file.” issue.

   The issue details are loaded into the form at the bottom of the window.

2. In the **Progress** list, click **In Progress**.

Note that the **Progress** list contains only **Assigned** and **In Progress**. In the default workflow, an **Assigned** issue cannot move directly to **Resolved** without first being marked **In Progress**.

3 Click **Save** to save the issue.

Investigate the problem:

If you have PC-Duo Enterprise Inventory, Enterprise HelpDesk gives you quick, easy access to detailed software and hardware information for a user's computer. By simply typing in the computer name, you automatically display accurate, up-to-date information about software, hardware, and other assets.

For example, you can use the inventory information to check the available space on the user's hard disk, or verify the I/O addresses for the parallel printer port.

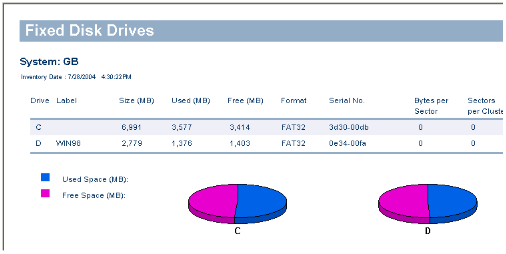
1 Click the **Overview** tab, and in the **Computer Name** box, type "GB". GB is one of the computers listed in the sample Inventory database included with Enterprise HelpDesk.

2 Click the **Inventory** tab.

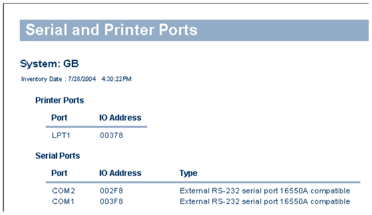
The **Inventory** tab displays a summary of the user's system, and provides a set of detailed reports that provide system configuration details, software and hardware change histories, and much more.

The **Inventory** tab always displays the most recent information available from the PC-Duo Enterprise site database.

3 In the **Reports** list, click **Fixed Drives** to check the disk space.



4 In the **Reports** list, click **Ports** to check the IO address of the printer port.



Step 4: Analyst Fixes the Problem

Suppose all it took to resolve this "Can't print a PDF file" issue was to walk over and reset the printer. Now that the problem is fixed, you have to mark the issue as **Resolved**.

Resolve the issue:

1 If you exited Enterprise HelpDesk, log on as **analyst** and open **HelpDesk / HelpDesk** .

2 In the **Summary List**, click the issue number of the "Can't print a PDF file." issue.

3 In the **Progress** list, click **Resolved**. Note that you have a number of other choices at this point:

Dropped - The employee no longer has a problem.

Waiting - You are waiting for more information from the employee.

To be Verified - The employee is trying your proposed solution to the problem.

4. Click the **Resolution** tab, and in the **Time Spent (minutes)** box, type the number of minutes it took you walk to the printer, reset it, and walk back to your desk.
5. In the **Resolution** box, type “Reset printer”.

Click **Save** to save the issue.

More About Working with Issues

Finding and Listing Issues

You use the **Query** box and the **Sort** and **Layout** lists to generate and format lists of issues in the **Summary List**.

A layout is the set of columns displayed in the Summary List.

The **Summary List** displays the results of a query as pages. For example, each page may contain 15 results (the actual number of results per page is set by your Enterprise HelpDesk administrator).

To browse the Summary List:

- Click to move back one page.
- Click to move forward one page.
- Click to go the first page.
- Click to go to the last page.

To change the size of the Summary List:

- Click and to increase and decrease the number of visible issues.

-or-

- Click **Options** and change the height of the Summary List.

To print the Summary List:

- You can use the **Summary List** to generate reports. See “Generating Reports from the Summary List” on page 24.

To refresh the Summary List

- Click .

Running Global and Saved Queries

The Query box on the Sumary toolbar allows you to run global queries and personal saved queries.

To run a global or saved query:

1. Click in the **Query** box, or click beside the **Query** box.
2. In the **Queries** dialog box, double-click the query that you want to run.

   Global Queries are the predefined queries available to all Census users. My Queries are the queries you defined and saved while working in Census.

Tip To see the definition of a query, click the query and then click .

Performing Simple Searches

By default, Enterprise HelpDesk displays a Simple search form (a **Search For** text box with a **Go** button).

The Simple query editor allows you search the Summary List for issues that contain a specific string. For example, type "incomplete" in the **Search for** box and click **Go** to search the **Summary List** for issues that contain the string "incomplete".

Simple search searches:

- Text fields, such as Brief Description and Description Log.
- Choice lists, such as Severity and Substate.
- Number fields.

Building Advanced Queries

You use the Advanced query editor to build more complex queries that use wildcards and multiple search conditions.

Predefined queries find broad categories of issues, such as all open issues or all assigned issues. Often you need to find issues based on more specific criteria. For example, you may want to search the Summary, Description, Notes, or Resolution fields for keywords. Or you may want to search for all issues submitted during a specific period of time.

To define an advanced query:

1. Internet Explorer only: In the **Summary Toolbar**, click .
2. Click **Advanced >>**.
3. In the **Field** list, click the issue field you want to search against.
4. In the **Test** list, click a query operator.
5. In the **Value** field, enter the value you want to search against.

Notes

- To save a query so you can use it again, click .
- If you type a search string in the Value box, press ENTER to start the search. When you choose a value from the Value list, the search starts automatically, but when you type the search string directly in the Value box, you must press ENTER.
- When you change the test in an ad-hoc query, you must click to run the new ad-hoc query.
- Text searches are case insensitive.

Combining Ad-hoc Queries

The **Retain Query** list allows you to combine an ad-hoc query with the previous query (which can be a predefined query from the **Query** list or another ad-hoc query). Use **And** to narrow the search and restrict the list of issues. Use **Or** to broaden the search and expand the list. Use **No** when you want to search the entire database of issues.

For example, **And** allows you to search the **Summary List**.

To search the issues in the Summary List:

1. In the **Query** list, click a query.
2. In the **Retain Query** list of the **Ad-hoc Query Editor**, click **And**. This combines the ad-hoc query with the current predefined query.
3. Run an ad-hoc query.

Searching for Dates

To search against dates, use the date format used by Enterprise HelpDesk to display dates such as **Submitted Date**. For example, to find all issues submitted since October 2004, use this ad-hoc query:

```
Submitted Date >= 10/1/2004
```

Using the Contains, Like, and Not Like Operators

Contains matches any part of a field, while **Like** and **Not Like** match the entire contents of a field. For example, the query

```
Summary Contains "keyword"
```

matches any issue that contains the string “keyword” anywhere in the **Summary** field.

The query

```
Summary Like Cannot print.
```

finds issues where the **Summary** field is exactly equal to “Cannot print.” Because **Like** applies to the entire field, it is typically used with wildcards. For example, the query

```
Summary Like Word hangs%
```

finds all issues where the **Summary** starts with the string “Word hangs”.

Not Like is also useful when combined with wildcards. For example, the query

```
Problem Area Not Like "System%"
```

finds all issues that are not system problems. Note that this example shows that you can use **Contains**, **Like**, and **Not Like** to search choice lists as well as text fields.

Searching with Wildcards

The **Like**, **Not Like**, and **Contains** operators support wildcard characters, which gives you considerable flexibility in the specification of search patterns. Using wildcards, you can search for inexact patterns of text in any field.

Wildcard	Matches
_	Any single character.
%	Zero or more characters. For example: " Contains fr%ze" matches any string that contains "freeze" or "froze" “Like Install%” matches any string that starts with “Install”
[charlist]	Any single character in charlist. Can include spaces, but not the right bracket (]) character. For example: "SP[56]" matches "SP5" or "SP6"
	Use a hyphen to specify a range of characters. For example: "[1-36-9]" matches the digits 1, 2, 3, 6, 7, 8, or 9
	To match the hyphen character, the hyphen must be either the first or last character in charlist. For example: "[-0-9]" or "[0-9-]" match any digit or a minus sign
[^charlist]	Any single character not in charlist. For example: "[^tb]rash" matches "crash" but not "trash" or "brash"

To search for the wildcard characters % and _, you must enclose them in brackets. For example, to search for a percent sign, use the pattern "[%]".

To search for character ranges in numeric fields (such as Issue and Revision Number), type quotations marks around the character range. For example, type "1[6-9]" to find issues 16, 17, 18, and 19.

Printing the Summary List

You can use reports (Listing or Custom) to print the contents of the Summary List. For example, you can use ad-hoc queries to find all issues submitted during the given time period, and then print a list of these issues.

To print the Summary List:

1 Click **Reports**.

2 In the **Reports** dialog box, click a report in the **Report Name** list.

3 Internet Explorer only: click .

4 Click **Issues in the Summary List**.

5 Click **View**.

6 On the **File** menu of the browser, click **Print**.

Viewing Issues

The **Summary List** displays a summary of each issue. To view the full details of an issue, you select it from the list.

To view issue details:

- In the **Summary List**, click the issue number or the folder icon.
  - or-
  Type an issue number in the **Issue** box and press ENTER.

Submitting Issues

To submit a new issue:

1 Click **New** to open a new issue.

2 Enter all available information about the issue.

3 Click **Save** to save the new issue.

Tips

- To save time, you can create a new issue by copying an existing issue. Just load the issue and then click **Copy**.
- If you do not fill in all the required fields, Enterprise HelpDesk prompts you to fill in the missing information.
- If you decide not to submit an issue, click **Cancel** to discard the issue.

Attaching Files to Issues

If you have notes, pictures, and other files that document an issue, you can attach them to the issue.

To attach an ASCII or binary file:

1 Beside the **Attachments** field, click .

2 In the **Attachments** dialog, click **Browse** and locate the file you want to attach.

3 Click **Upload File** to copy the file to the server. Click **Link File** to add a link to the file on your local computer.

Use attachments instead of entering large amounts of text (over 100,000 characters) into memo fields such as the Description field. If you want to be able to search against the text, you can put a summary or some keywords in the Description field.

Linking Child Issues to a Parent Issue

Enterprise HelpDesk allows you to link one or more child issues to a parent issue. For example, if you have several bugs that are all symptoms of the same problem, you can make those bugs the children of the main, parent bug for the problem. Or if a task consists of a number of sub-tasks, the sub-task issues can be children of the main task.

By default, the parent issue controls the substate of the child issues. For example, when you change the substate of the parent to Fixed, all the children are also marked Fixed. If you want the substate of a child issue to be independent from the substate of the parent issue, load the child issue and on the **Overview** tab, change **Substate controlled by parent** to **No**.

To add child issues to a parent issue:

1. Make a note of the issue numbers of the child issues.
2. Load the parent issue.
3. Click the **Child** Issues tab. For each child issue, click **Add**, type the issue number of the child, and click **OK**.

Notes

- To view a child issue, click the issue number, owner, substate, or brief description of the issue. This displays information about the child issue in a separate window.
- To edit a child issue, select the issue (click in a blank area of the row) and then click **Load**.
- To remove a child issue, select the issue (click in a blank area of the row) and then click Remove.
- You can find the parent issues of a child issue by searching against the **Child Issues** field. For example, to find the parent issues of the issue 22, use the Advanced query editor to search for **Child Issues = 22**.
- To find all parent issues, use the Advanced query editor to search for **Child Issues <> 0**

Viewing an Issue's Revision History

Enterprise HelpDesk maintains a revision history for each issue. The revision history is a list of all changes made to the issue after it was first submitted. Each time you save an issue, Enterprise HelpDesk records the changes you made in the revision history.

To open the Revision History for an issue:

1. In the **Summary List**, click an issue number, or type an issue number in the **Issue** box and press **Enter**.
2. In the Web view toolbar, click **History**. 

The revision number (Revision column in the Revision History column) increases by one each time the issue is saved. The first revision, which is not shown, is the initial submission of the issue.

Updating Issues

A typical issue is constantly updated during its lifetime, as employees and help desk staff track and follow up on the issue. Depending on your role in the company, you may update an issue by changing its status, assigning it to a help desk analyst, adding notes, or adding resolution information when the issue is closed.

To update an issue:

1. In the **Summary List**, click an issue number, or type an issue number in the **Issue** box and press **Enter**.
2. Edit the issue information.
3. Click **Save** to save your changes, or **Cancel** to discard your changes.

Setting the Default Values for New Issues

To help save time when submitting new issues, you can set your own personal default values for new issues.

To set the default values for a Web view:

1. Log on to the Web view.
2. In the Web view toolbar, click **Defaults**.
3. In the **Default Values** dialog box, set the field values you want to use as defaults for new issues.
4. Click **Apply**.

Printing Issues

To print an issue:

1. In the **Summary List**, click an issue number, or type an issue number in the **Issue** box and press **Enter**.
2. Click **Print** to generate a detailed report for the current issue.
3. On the **File** menu of the browser, click **Print**.

To print an issue using a different report:

1. In the **Summary List**, click an issue number, or type an issue number in the **Issue** box and press **Enter**.
2. Click **Reports**.
3. In the **Reports** dialog box, click a report in the **Report Name** list.
4. Internet Explorer only: click .
5. Click **The current issue**.
6. Click **View** to generate and view the report.
7. On the **File** menu of the browser, click **Print**.

Reporting

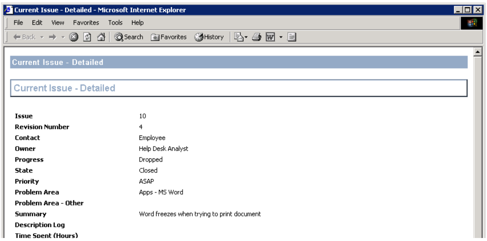
Enterprise HelpDesk provides Web-based reporting to help you manage your help desk. Enterprise HelpDesk uses HTML to display Listing reports, and Crystal Reports to display custom reports.

Enterprise HelpDesk includes the Crystal Reports v9.0 Runtime Software, which is used to display custom reports.

Listing Reports

Listing reports extract and present subsets of the information entered in the issues.

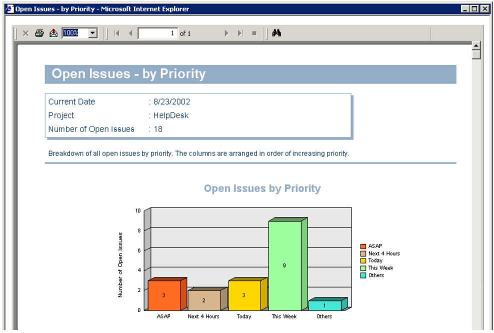
Sample HTML Listing Report



Custom Reports

Custom reports are customized listing reports that present data in graphic formats such as pie charts and bar charts. Custom reports are built with Crystal Reports, so you can add features such as charts, formulas, field highlighting, and running totals to a listing report. You can also import graphics (such as company logos) and completely reformat a listing report.

Sample Custom Report



Viewing Reports

To view reports:

1 Click **Reports** .

2 Click the **Listing** tab or the **Custom** tab.

3 Click the report you want to view, and then click the **View** button.

To view reports in landscape mode:

You can view custom reports in landscape mode (landscape mode requires the Crystal Reports viewer).

1 Internet Explorer only: in the **Report Viewer**, click .

2 In the **Layout** list, click **Landscape**.

Printing Reports

To print HTML reports:

- In the **File** menu of the browser, click **Print**.

To print reports from the Crystal Reports viewer:

- In the toolbar of the Crystal Reports viewer, click to print the issue. Click to save the report as PDF, Word, or Excel.

Generating Reports from the Summary List

You can use reports (Listing or Custom) to print the contents of the Summary List. For example, you can use ad-hoc queries to find all issues submitted during the given time period, and then print a list of these issues.

To generate reports from the Summary List:

1. Use predefined and ad-hoc queries to list the issues you want to include in the report.
2. Click **Reports** .
3. In the **Reports** dialog box, click a report in the **Report Name** list.
4. Click and then click **Issues in the Summary List**.
5. Click **View** to generate and view the report.

Viewing Crystal Reports

With Crystal Reports, you can use either ActiveX or a Java report viewer. The ActiveX report viewer works only on Internet Explorer. By default, Enterprise HelpDesk detects your browser type and sets the viewer type for you.

To change the report viewer:

1. Internet Explorer only: in the **Report Viewer**, click .
2. In the **Viewer Type** list, click the viewer you want to use.

Contacts, Passwords, and Options

Adding and Editing Contacts

A contact is a person who does not have a Enterprise HelpDesk user account, but who reports issues. For example, issues can be reported by guests or contractors who are not Enterprise HelpDesk users.

When you submit an issue, you select a contact from the **Contact** list. By default, the **Contact** list includes the name of all Enterprise HelpDesk users. To add other names to this list, you use the **Contact** command.

To add a contact:

1 In the Web view toolbar, click **Contacts** .

2 Click .

3 Enter the contact information and click **Apply**.

To edit a contact:

1 In the Web view toolbar, click **Contacts** .

2 In the **Display** list:

- To list all contacts, click **Contacts**.
- To list only the names starting with a certain letter or string, click **Names starting with**, type the letter or string, and press ENTER.
- To list only the names containing a certain string, click **Names containing**, type the string, and press ENTER.

3 In the list of contacts, click a contact and then click .

4 Edit the user information and then click **Apply**. Click **Cancel** to cancel the changes.

Disabling a contact has no effect.

Changing your Password

To change your password:

1 In the Web view toolbar, click **Password** .

2 In the **Old Password** box, type your current password.

3 In the **Password** box, type your new password.

4 In the **Confirm Password** box, type your new password again.

5 Click **OK**. Click **Clear** to clear all text boxes, or click **Cancel** to exit without changing your password.

If you forget your password, ask your Enterprise HelpDesk administrator to reset your password.

Setting Options

To set the heights of the Summary List and the issue details:

1. In the Web view toolbar, click **Options** .
2. Enter a percentage value for either the **Summary List** or the **Details** (the form that displays the issue fields). The other value is automatically calculated.

The percentages indicate the amount of vertical space used by the **Summary List** and the issue.

The percentages add up to 100% and divide the available vertical space between the list and the form (a certain amount of vertical space is reserved for the other elements of the Web view).

To set the default query editor:

By default, Enterprise HelpDesk displays the Simple search form when users log on. You can change this so Enterprise HelpDesk displays the Advanced query editor by default.

1. In the Web view toolbar, click **Options** .
2. Under **Ad-hoc Query Editor**, click **Advanced Search**.

Inventory and Remote Control

About Inventory

Help desk integration with PC-Duo Enterprise Inventory makes a wealth of information about a user's PC immediately available to help desk staff. All a help desk analyst has to do is type in the computer name, and all the software and hardware information stored in the PC-Duo Enterprise site database becomes available.

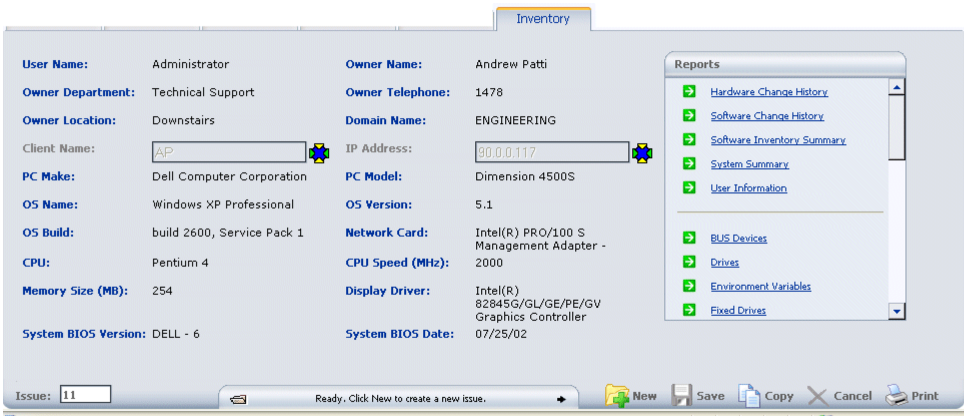
Inventory integration is an optional feature that requires the separate purchase of PC-Duo Enterprise Inventory.

The Inventory Tab

In a Web view, the Inventory tab displays a summary of the inventory information for the user's computer, and includes a set of detailed reports.

Only the computer name is stored in the Enterprise HelpDesk database. The Inventory information displayed in Web views always comes directly from the PC-Duo Enterprise site database.

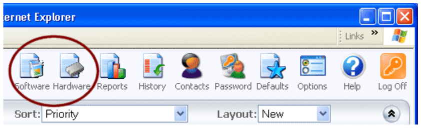
INVENTORY TAB The Inventory tab provides a wide range of software and hardware information for a user's computer. The tab displays a summary of the user's system, and provides a set of detailed reports that provide system configuration details, software and hardware change histories, environment variable settings, and much more.



Site-Wide Inventory Reports

In addition to the Inventory tab, which provides computer-specific information, Web views include a set of general software and hardware inventory reports. These site-wide reports provide information for all computers.

Site-Wide Inventory Reports



Remote Control

By default, Enterprise HelpDesk adds Remote Control buttons to the fields (such as Computer Name) used to query the PC-Duo Enterprise site database for Inventory information.

Field with a Remote Control button

The Remote Control button () connects to the specified computer and starts a PC-Duo ActiveX Remote Control session. The remote control session runs in a browser window, and does not require the PC-Duo Control to be installed on the local computer.

Remote control is an optional feature that requires the separate purchase of PC-Duo Remote Control.