



# HEAT System Administration Course Agenda\*

Version 3.0 Last Updated 03/12/04

**DAY ONE** (8:30 a.m. to 4:30 p.m.)

## **Introductions**

### **Call Logging module as it relates to system design**

It is essential to understand how the Call Logging system works in order to consider the design of a HEAT system. For this reason, we spend this time discussing the functionality and flow of logging calls and screen design as it relates to the customization of a HEAT system. Topics include:

- Efficient Call Flow
- Screen layout and design
- Creating and updating call records
- Assigning call records
- Using the journal
- Creating and using call groups
- Maintaining Profile and Configuration records
- Using the Call History information
- Using HEAT mail messaging capabilities
- Discussion of Customer Types
- The creation & use of AutoTasks for greater efficiency



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## **DAY TWO** (8:30 a.m. to 4:30 p.m.)

### **Customization of HEAT System**

We now get into the heart of the functionality that will allow you to customize a HEAT system. This time is spent in instructor led exercises and discussion of each area of the system that can be customized. Topics include:

- Discuss concept of data sources and edit sets
- Creating New Customer Types
- Design Profile and Subset forms
- Design Configuration types and forms
- Design Detail forms for matching Call Types
- Design HEAT validation tables



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## **DAY THREE** (8:30 a.m. to 4:30 p.m.)

### **Continue workshop customization of HEAT system**

The morning will be spent in workshop format with further exercises and discussion on how a HEAT system can be customized with the guidance and expertise of the HEAT instructor.

### **Administration of the HEAT system**

After a HEAT system has been customized, it is important to understand how to maintain the integrity of this valuable information. The administration of HEAT is as important as the design of the system. Topics include:

- Backing up a database and disaster recovery
- Setting system defaults
- Defining system security
- The principles of importing and exporting data into/from a database
- Creating global changes for a database



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### **DAY FOUR** (8:30 a.m. to 4:30 p.m.)

#### **First Level Support**

First Level Support (FLS) can serve as a powerful knowledge tool for a help desk or customer support center. With FLS, you can collect, preserve, and maintain the valuable knowledge and experience of your staff. Record the solutions you discover to your callers' problems and you will never have to solve a problem more than once! New support staff can be trained more quickly and efficiently and provide a consistent base of answers and solutions to improve customer satisfaction. Topics include:

- Using First Level Support to resolve problem tickets
- Using Commercial Knowledge Trees
- Viewing linked note files, graphical images, and playing video or sound files
- Creating and modifying custom knowledge

#### **iHEAT**

iHEAT module gives your technicians the optional method of accessing key modules by means of an internet/intranet connection. Issues included for discussion are:

- The differences between using a Java Client and a Windows Client when launching iHEAT.
- Why tools are limited in the HEAT Administrator module.
- The use of iHEAT's Cluster Manager.

#### **Alert Monitor**

Alert Monitor will keep users and technicians up to date on issues that have been assigned to them without having to be logged into Call Logging. Your technicians are often in other programs, but need to be alerted when an issue has been assigned to them. Based on groups created in Call Logging, Alert Monitor can be set to alert a technician whether they are at their desk or away from their desk, and will prompt the technician dependent on how the program is set-up.

#### **Business Process Automation Module**

The Business Process Automation Module, or BPAM, is used to automatically monitor call record conditions. An administrator will define business rules to govern the database. The module can then take actions to escalate issues, to modify call records, or to carry out predefined actions. For example, a business rule can be defined so that Help Desk personnel are notified to examine call records that have been unchanged for more than five hours. Topics include:

- Adding, editing, or deleting a business rule
- Modifying how issues are being monitored
- Setting up how call records are modified
- Selecting AutoTasks to be used in escalating issues
- Changing the order of existing business rules
- Enabling or disabling existing business rules without removing them from the list of rules



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### Security Based View Sets

HEAT allows you to create different views of the same form so members of certain roles can see fields on a form that other roles cannot. Topics include:

- Creating views in an edit set.
- Apply the view to a role
- Test the view

### External Tables

You are able to use external tables to validate fields in your HEAT system. This will allow you to read data from the external table without having to maintain it in two different databases. Topics include:

- Preparing the external database for connection
- Designing an external table connection in the HEAT system



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### **DAY FIVE** (8:30 a.m. to 1:00 )

#### **Auto Ticket Generator**

With the Autoticket Generator, you can set up your HEAT system to create call records directly from messages sent to MAPI or VIM-compliant e-mail systems. Topics include:

- Defining an Automatic Ticket
- Sending automatic tickets through e-mail

#### **Answer Wizard**

Analyzing the information stored in HEAT will allow the Help Desk manager to make decisions, such as how many calls are taken in a particular period of time, how many calls are open, and which technicians are working on what issues, etc. Answer Wizard allows the user and/or manager to report on the Help Desk, without needing any knowledge of a report designer. By answering a series of questions, Answer Wizard will run a report based on those answers. Consistently requested reports can be added to a special area making further reporting even more efficient. Topics included:

- Running reports through Answer Wizard
- Printing and exporting reports
- Putting often requested reports into a special area

#### **Manager's Console**

Manager's Console allows the Help Desk manager to visually keep track of what is going on in HEAT in real time. This will allow them to better manage their staff and other issues that may come up, possibly handling a problem before it happens. Also, information on how past issues were resolved can be stored for future reference, not only helping the manager avoid a problem, but keep track of the solutions used in the past. By requesting the type of data to track and the style of graph to track the data, the user gets a real-time look at the database. Topics include:

- Requesting data to track
- Creating graphs to track
- Managing the data
- Creating automated warning messages

#### **HEAT Link to LDAP**

HEAT can be integrated with an LDAP directory service so that you can populate the HEAT Profile table with data from the directory service. Topics included:

- Populate the HEAT Profile Table with data from the LDAP directory service.
- Configure the transfer of information through the HEAT Link to LDAP Configuration Tool.
- Update customer/employee profiles on the fly.
- As an administrator, start or stop the service through the Service Control or the Service Application.

*\*The order of agenda contents is subject to change*