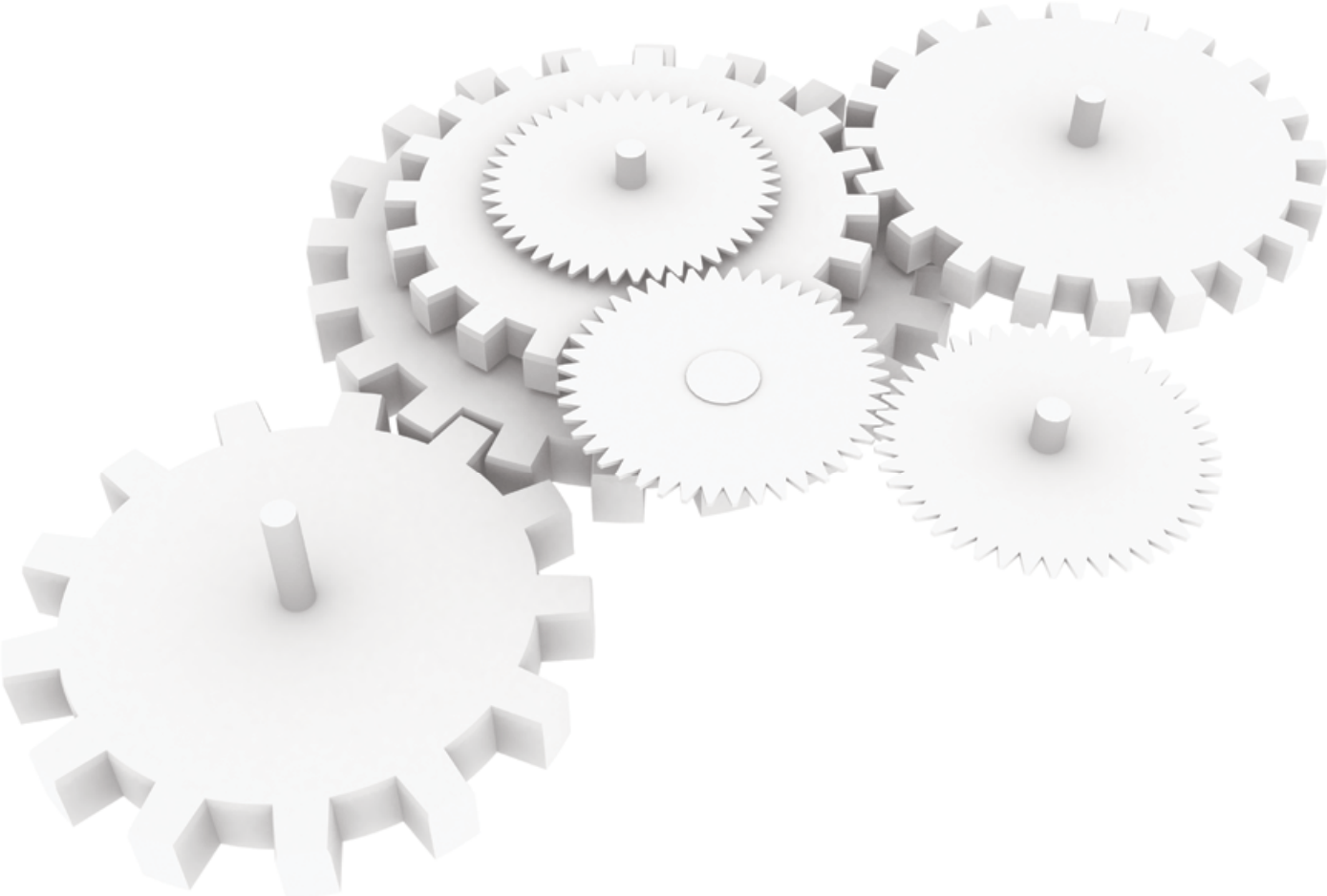


Richmond Systems

SupportDesk Mobile Client User Guide



RICHMOND
SupportDesk



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SupportDesk Mobile

SupportDesk for Windows Mobile

Welcome to the help file for SupportDesk for Windows Mobile.

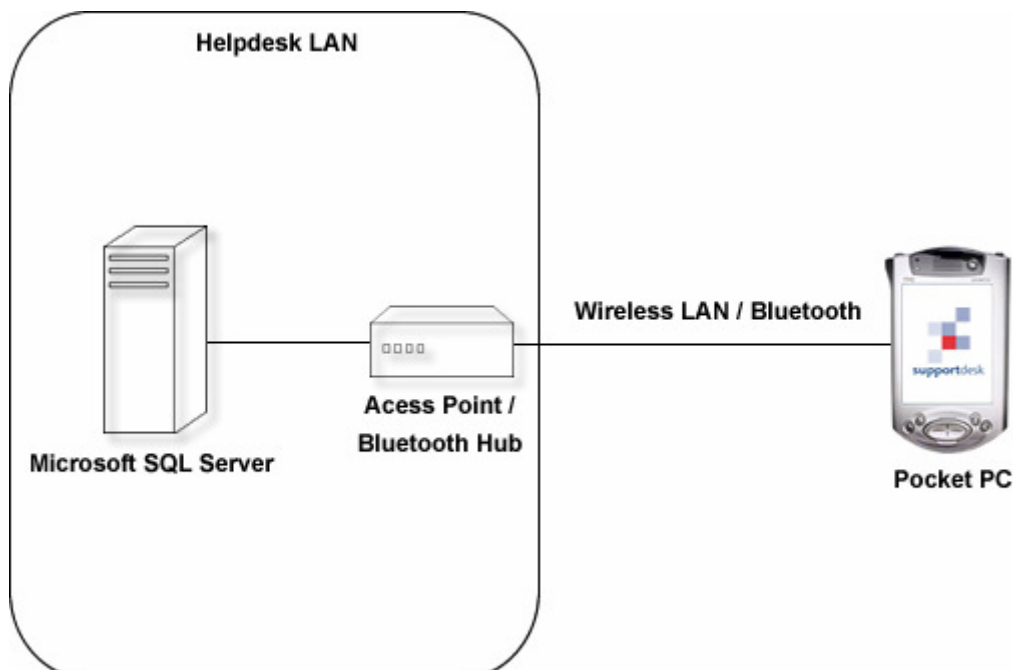
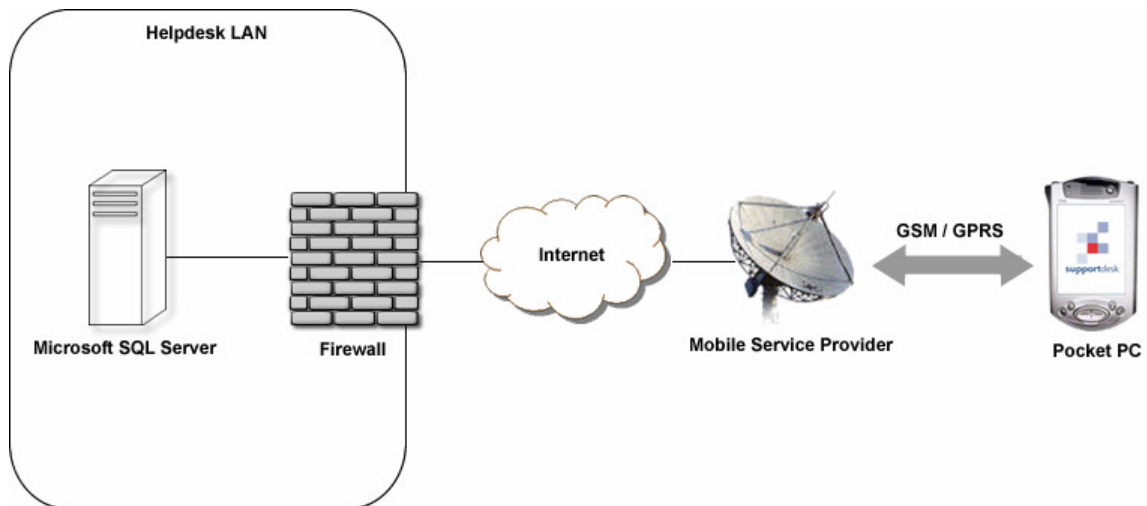
This new interface to SupportDesk has been designed to aid SupportDesk specialists who are working away from their desks or in the field and need to enter or update information in SupportDesk in real time.

This edition of SupportDesk is specifically designed to run on the Microsoft Pocket PC and Windows Mobile operating systems. Installation requires a host PC, and Microsoft Activesync version 3.6 or later.

The pocket PC may connect to the SupportDesk database in a number of ways, e.g.:

- Wireless LAN
- Bluetooth
- GPRS
- GSM

The following diagrams indicate some typical set-ups:



Irrespective of the connection type used, the SQL server port needs to be left open by any firewall type devices. This port can be customised using the SQL server network utility on the SQL server itself. If the device will be connecting via the internet, great care must be taken to ensure that the SQL server is secure. It is important to appreciate that MSDE does not by default have a password for the SA (System Administrator) login, and this is a security issue that has been exploited by malicious computer worms in the past.

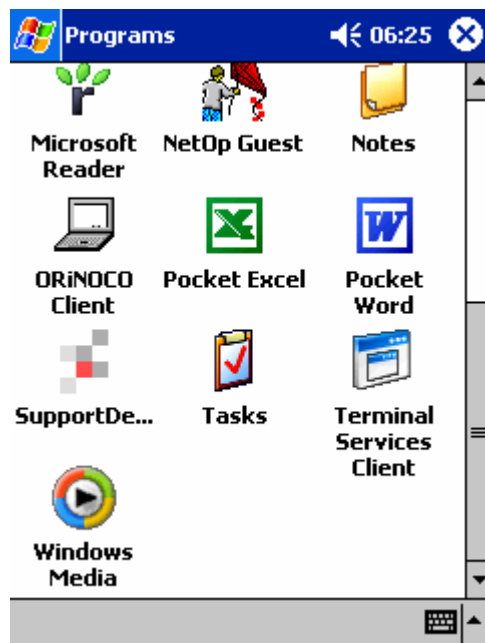
The performance of SupportDesk will always depend upon the speed and reliability of the connection to the SQL server database.

Using SupportDesk for Windows Mobile

Running SupportDesk

Launch SupportDesk by clicking on the SupportDesk icon in the Program folder.

The location and layout of the program folder will vary depending upon the device type and operating system version. An example is displayed below.



Upon clicking that icon, the user is then presented with the logon screen.



SupportDesk 03:47 ok

supportdesk

User ID

Password

SQL Server

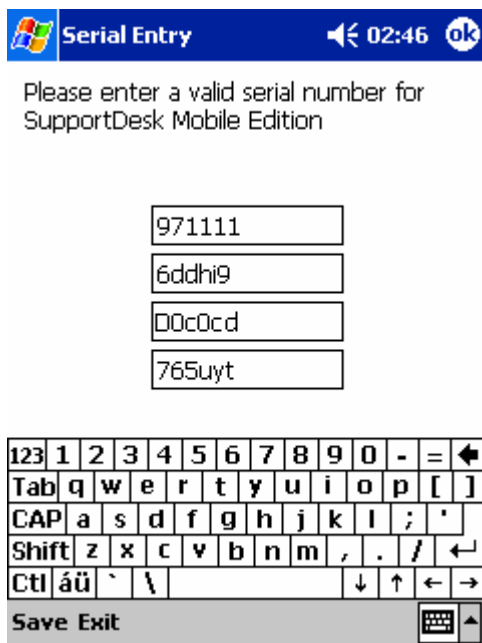
Database Name

Login Exit Build: 1.0.1312.18094

When connecting for the first time, the user will need to specify the name or IP address of the SQL server. Also ensure whatever communications device is to be used is installed and working correctly. Enter the user ID and password. Click 'login' to proceed.

If the login fails and the connection parameters are correct, then follow the troubleshooting guide in the section entitled 'implementing SupportDesk'

If SupportDesk mobile is being run for the first time in this environment then the user will be prompted to enter their Mobile License number. This is provided on the licence certificate. Note that logging in for the first time from a mobile device may take some time whilst the device registers itself within the SupportDesk database.



Serial Entry 02:46 ok

Please enter a valid serial number for SupportDesk Mobile Edition

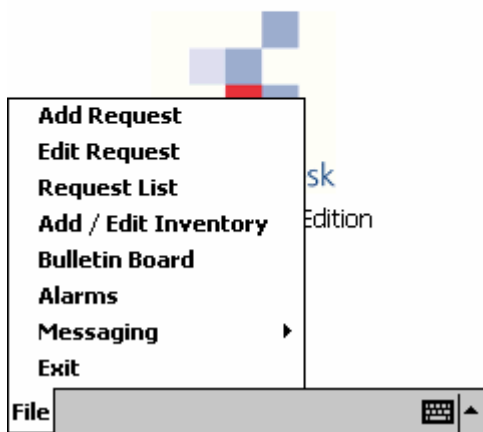
123	1	2	3	4	5	6	7	8	9	0	-	=	←
Tab	q	w	e	r	t	y	u	i	o	p	[]	
CAP	a	s	d	f	g	h	j	k	l	;	'		
Shift	z	x	c	v	b	n	m	,	.	/	←		
Ctl	á	ü	`	\						↓	↑	←	→

Save Exit

Once logged in successfully, the main window will appear.



Clicking on the file menu brings up the main SupportDesk functions.



Working with Inventory Items

SupportDesk for Windows Mobile provides an enhanced way of viewing and exploring the navigator.

From the main menu, click File, Add/Edit inventory.

To avoid having to drill down to find items; the user first enters one or more characters in the search box. Clicking search will then return a flat list of matching items from the navigator. These items can come from anywhere within the regular SupportDesk navigator. Once the results have appeared, the user may then drill down further into the navigator to find the desired item, as shown in the diagram.



Once the desired item has been found, pressing and holding the pointing device on that item bring up a menu, allowing the various functions to be performed.



Clicking Edit item brings up the details for that item.

The screenshot shows the top navigation bar with the 'Inventory' title, a back arrow, the time '05:25', and an 'ok' button. Below the navigation bar is a dropdown menu labeled 'Contact'. The main content area contains a table with the following data:

Field	Data
Surname (*)	Terry
Forename (*)	Simon
Title	
Jobtitle	
Telephone 1	
Telephone 2	
Faxnumber	
Department	

At the bottom of the screen, there is a 'Save Functions' button and a keyboard icon.

Field values may then be modified. Once a field has been selected, the user may click on the drop down box to automatically provide a selection of values for that field. Clicking the Save menu item will store any changes.

This screenshot is identical to the previous one, but with a functions menu open over the 'Save Functions' button. The menu contains the following options:

- Add Request
- Add Item
- Delete Item

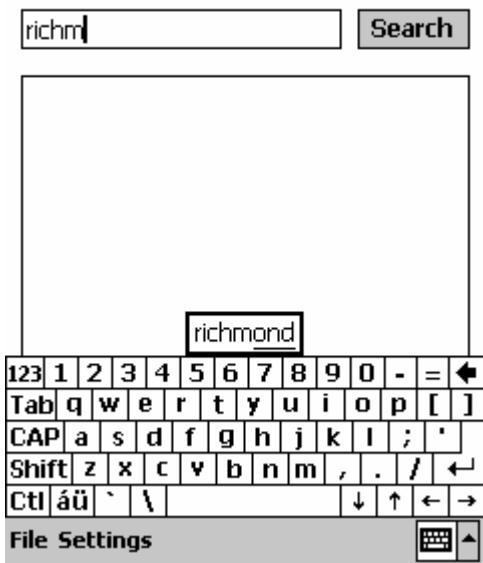
Clicking on the Functions menu will allow the user to add a request against the item, add a child item or delete the item being displayed.

Adding a New Inventory Item

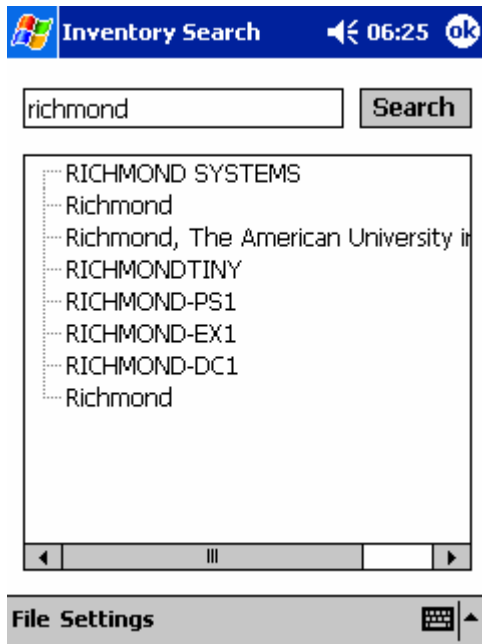
From the main window, click Add/Edit Inventory.



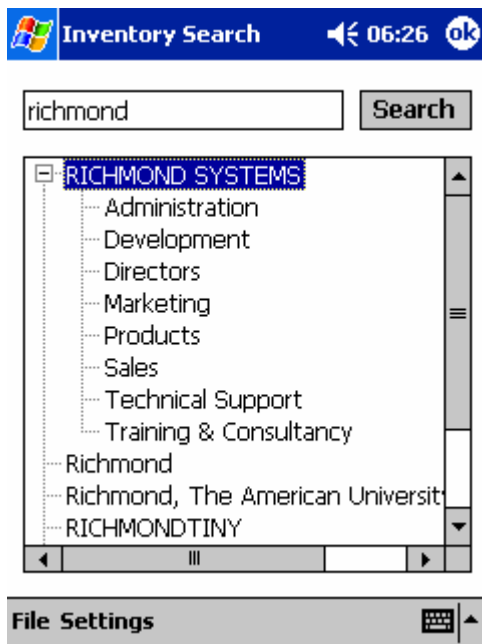
To add an item at the top of the inventory then click File, Add item. Otherwise search for the parent item to add to. Start by typing in the first few characters of the item.



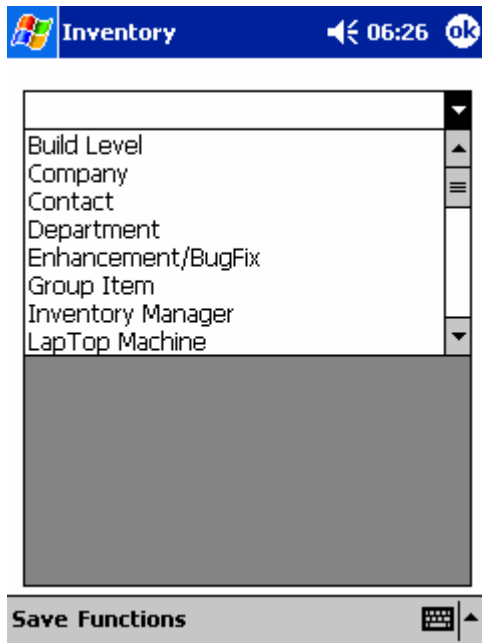
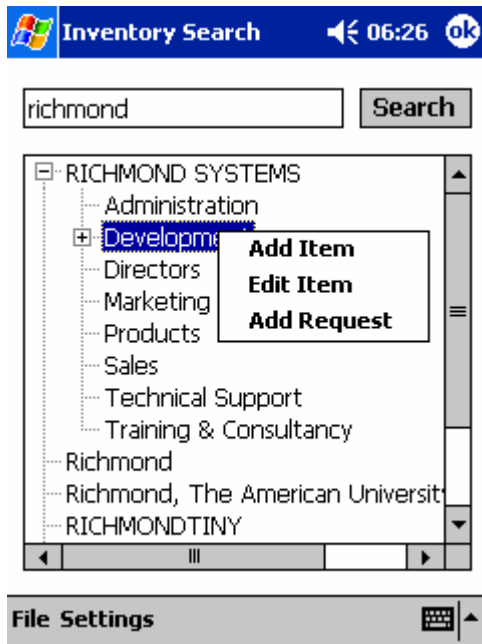
Click search.



From here you may continue to drill down the navigator if desired.



Highlight the item to add to and click Add Item.



Enter data for the fields. Compulsory fields are suffixed by an asterisk.

Inventory 06:26 ok

Contact

Field	Data
Surname (*)	
Forename (*)	
Title	
Jobtitle	
Telephone 1	
Telephone2	
Faxnumber	
Department	

Save Functions

Clicking on the drop down box will provide possible values for this field.

Inventory 06:27 ok

Maximizer

Field	Data
Last_Name	francis
First_Name	a
Company	Aidan
Address1	Aileen
Address2	Ajit
Town/City	Alan
County	Alastair

123 1 2 3 4
 Tab q w e r t y u i o p l j
 CAP a s d f g h j k l ; ' .
 Shift z x c v b n m , . / <=>
 Ctl á ü ` \ ↓ ↑ ← →

Save Functions

Some users may prefer to use the freehand method of entering data. (select this mode from the menu button on the bottom right)

Field	Data
Last_Name	francis
First_Name	Alex
Company	black
Address1	
Address2	
Town/City	
County	
Zip/Postal	
Country	
Phone1	

The mobile device then interprets the handwriting as text.

Field	Data
Last_Name	francis
First_Name	Alex
Company	black Jacks
Address1	
Address2	
Town/City	
County	
Zip/Postal	
Country	
Phone1	

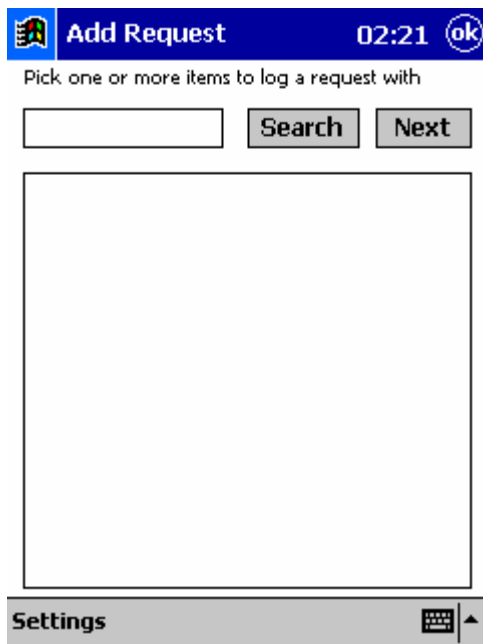
Adding a Request

This section assumes the user is familiar with the procedure of adding requests within SupportDesk for Windows. In order to add a request, either select add request from the Item details screen (see last section) or follow this procedure:

From the main menu, click add request



The following screen appears



Enter one or more characters from the item you wish to add the request against (alternatively you may find one of the parents from the navigator and drill down to the item).

Add Request 02:22 **ok**

Pick one or more items to log a request with

richmond **Search** **Next**

- RICHMOND SYSTEMS
 - Administration
 - Development
 - Berry
 - Byers
 - DEV50-new
 - DEVELOP2K
 - GDUALXP2
 - GORDONXP2
 - RICHMONDTINY
 - SIMONB-XP
 - Test Machines

Settings

Check the box(es) next to the items you wish to associate with the request and then click Next.

From the screen shown, select values from each of the drop down boxes for the new request. Any values pre-selected from your user profile will be added to the field(s).

Add Request 06:03 **ok**

Category

Status

Priority

SLA

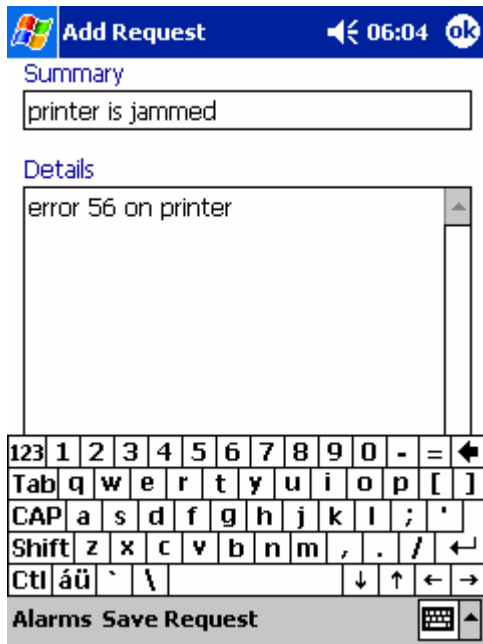
Specialist

Logged By

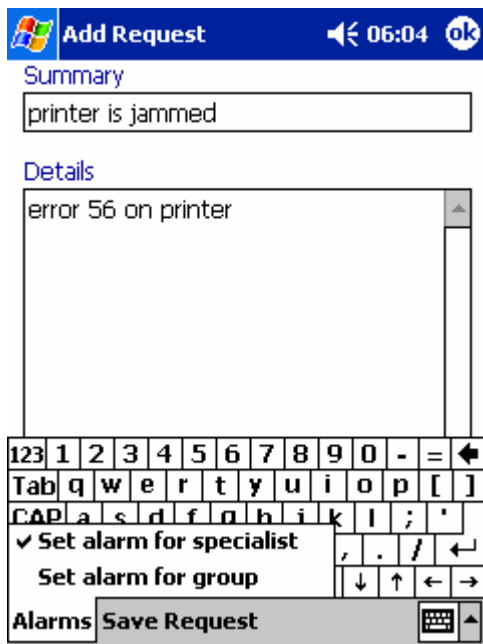
Group

Next

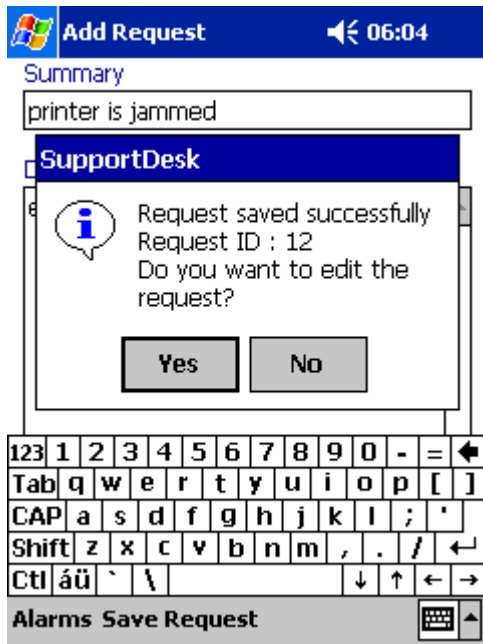
Click next and enter Summary and Details information for the request as desired.



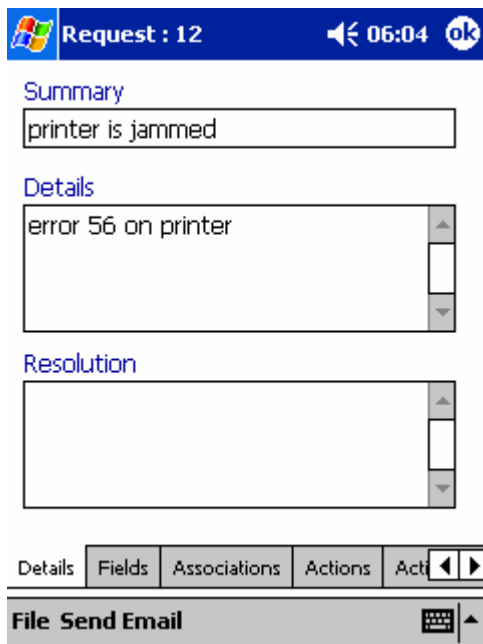
From the alarms menu it is possible to set alarms for specialists that relate to the request.



SupportDesk then presents the ID of the new request, and allows the user to edit that request. Click Yes.



Clicking on the tabs at the bottom of the screen will display the different information stored about that request.



These values can be edited.

Request : 12 06:04 ok

Category Hardware

Status IOpen

Priority Medium

SLA None

Specialist Richmond

Logged By RICHMOND

Group HelpDesk

Details Fields Associations Actions Acti

File Send Email

The associations tab allows for new items to be added to the request.

Request : 12 06:04 ok

Search

Add

Associated Items

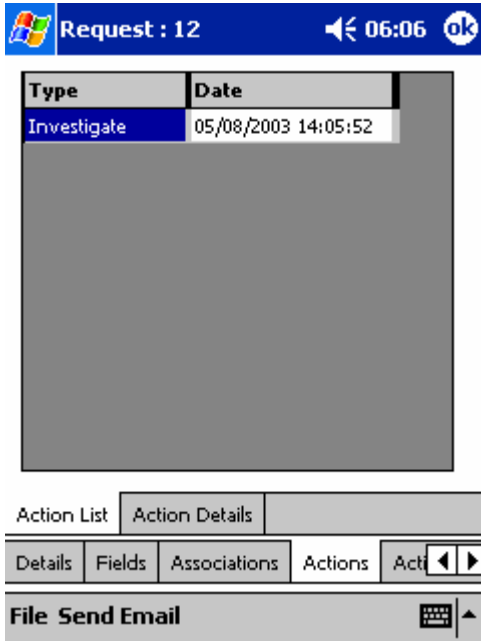
Laserjet 5
Terry

Remove

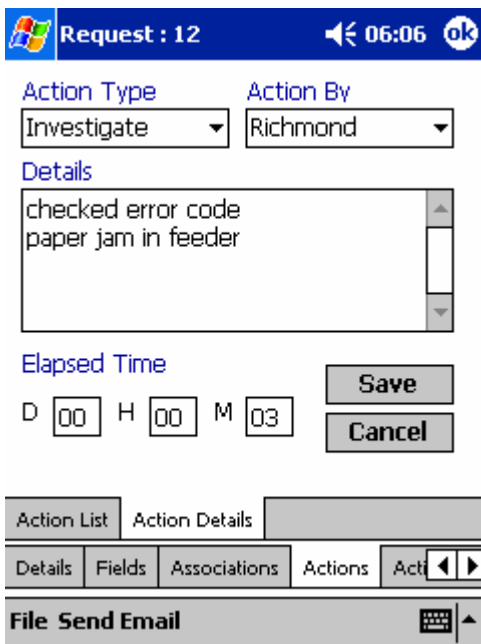
Details Fields Associations Actions Acti

File Send Email

The actions tab allows for actions to be added and edited. To edit an action, select it from the list and choose 'Edit'.



The action details tab then displays the details for that action.



Clicking Add Action will bring up a blank action screen.

Request : 12 06:06 ok

Action Type Action By

Details

Elapsed Time

D H M

Save

New

Action List | Action Details

Associations | Actions | Activities | Log

File Send Email

Enter the details and click Save. The action will then be displayed in the action list.

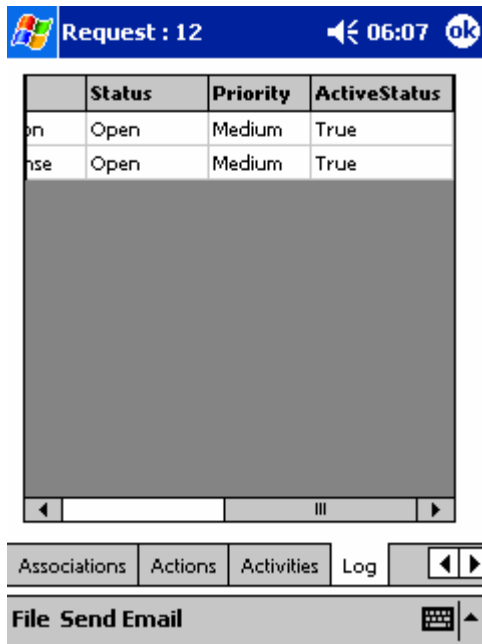
Request : 12 06:07 ok

Date	User ID	Cause
05/08/2003 14:04:34	Richmond	Creation
05/08/2003 14:05:52	RICHMON	Response

Associations | Actions | Activities | Log

File Send Email

Clicking on the scroll bar at the bottom of the screen allows for further action details to be displayed.



The About Screen

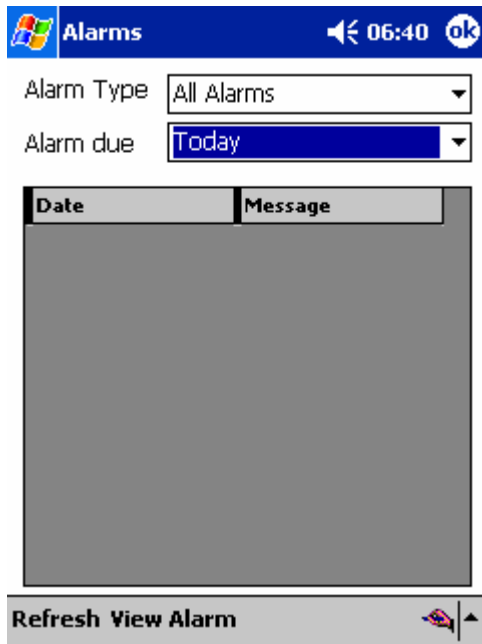
The about screen is used to display the version number of the product as well as contact details for the distributor in your country.

From the about screen, it is also possible to change the serial number. Click Options, Change serial number.

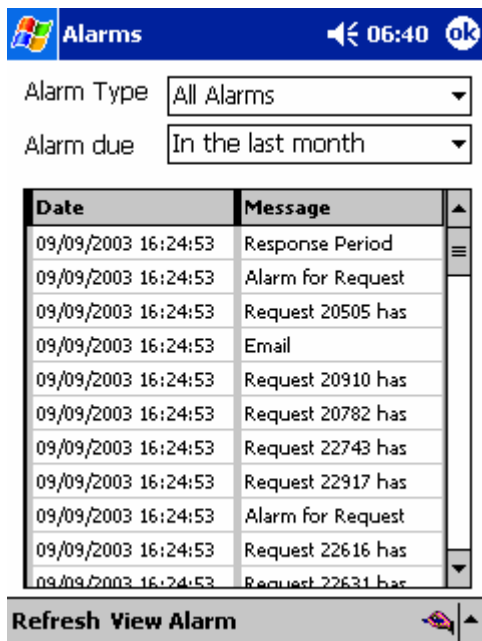


Viewing Alarms

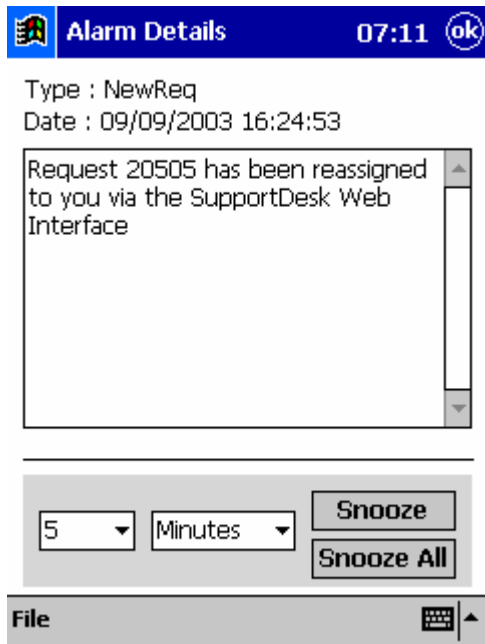
From the main window, click File, Alarms.



Select the criteria for alarms to display.

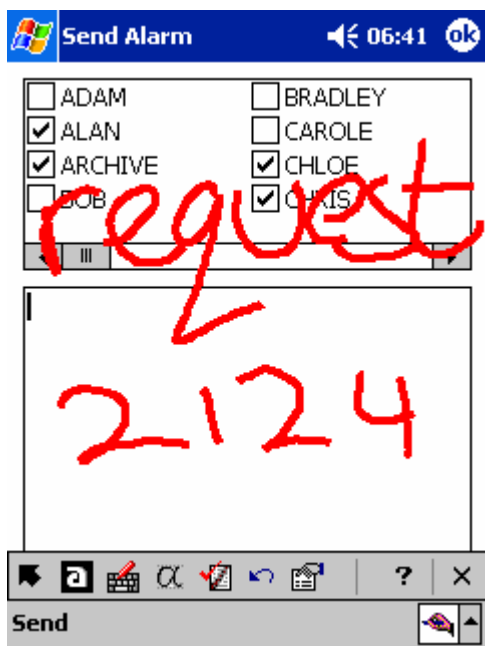


To view the details for an alarm then click the alarm and click view alarm.

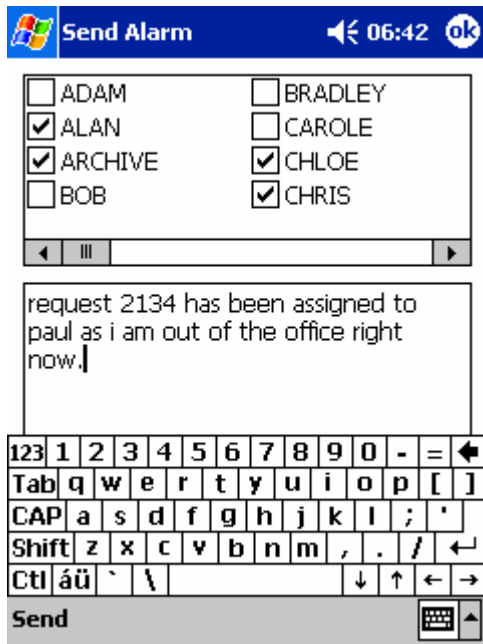


Setting Alarms

From the alarms screen (click File, Messaging, Send Alarm), click on the new alarms button. Click on the specialists to receive the alarms.



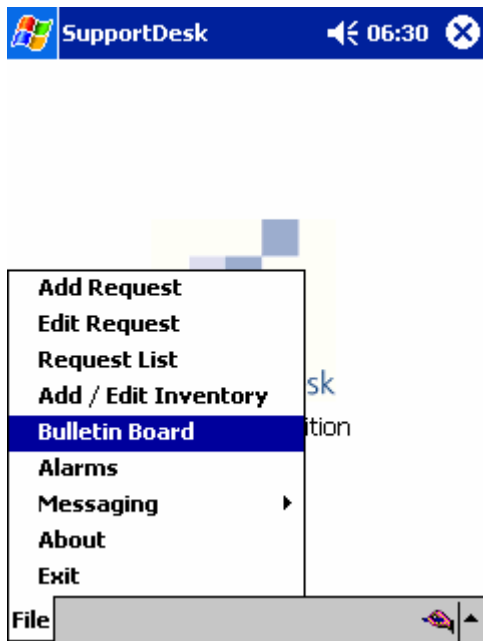
Enter text for the alarm either using the keyboard or by writing freehand in freehand mode.






Click Send.

The Bulletin Board



The bulletin board is a place where users can view important system wide messages. From the main menu click File, Bulletin Board.






The articles are then displayed in a list.

 **Bulletin Board**  06:36 

UserID	Bulletin	Date
PAUL	Can whoever stole	11/09/2003
RICHMOND	The company day	11/09/2003
RICHMOND	There will be a fire	11/09/2003
RICHMOND	The exchange server	11/09/2003



File  

Clicking on an article displays its details.

 **Bulletin Details**  06:38 

There will be a fire drill on Tuesday at 3pm

Update User ID
 UserID : RICHMOND
 Date : 11/09/2003 14:32:36

Save  

To add a new article click File, Add.

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