HEAT
USER GUIDE

(Last updated 04/24/2006)

http://www.nd.gov/itd/support/docs/heat-user-guide.pdf

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Documentation Guidelines

For Call Descriptions, Journal Entries, and Close Descriptions

Everyone using the Incident Management system shall follow the same documentation guidelines. Call Descriptions, Journal Entries, and Close Descriptions need to be returned to our customers consistently in order to provide a polished, professional image.

Avoid typing in ALL CAPS. This sometimes implies yelling and is often seen as offensive.
Use appropriate capitalization and punctuation.

Limit abbreviations (unless common).

Check for spelling errors.

Use descriptive responses. Remember, this information is going back to our customers.

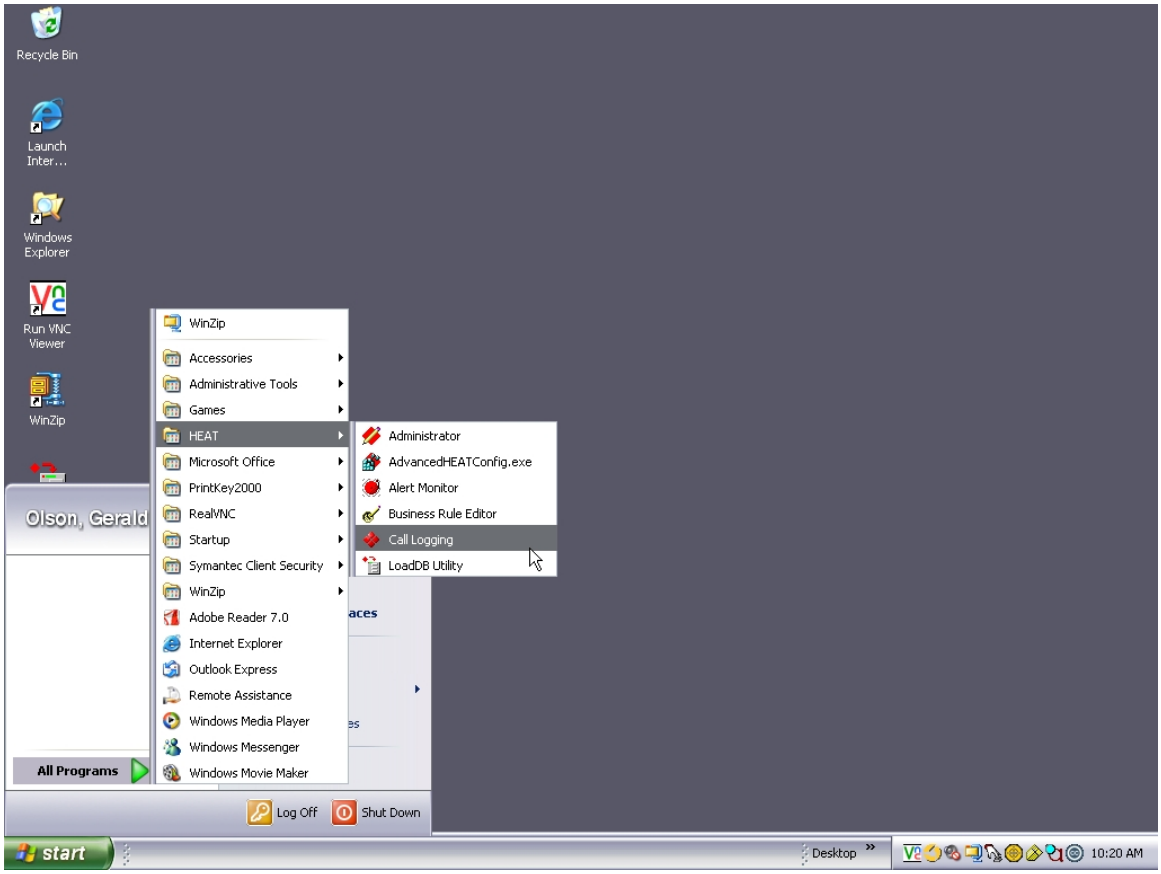
Elaborate on the Resolution Sent to Customer. Do not use shortcuts such as: “Completed”, “Fixed”, “Closed”, “Called User”, “Done”, etc. Let the customer know what was fixed, and restate key information you may have told them. You do not need to document word for word the steps to resolution. However, include enough information so that someone reading the Incident for the first time could have a reasonable understanding of what occurred.

Keep a positive and concise tone. Write as if you are talking to someone.

Remember your audience. You will need to adjust your style when responding to technical and non-technical customers.

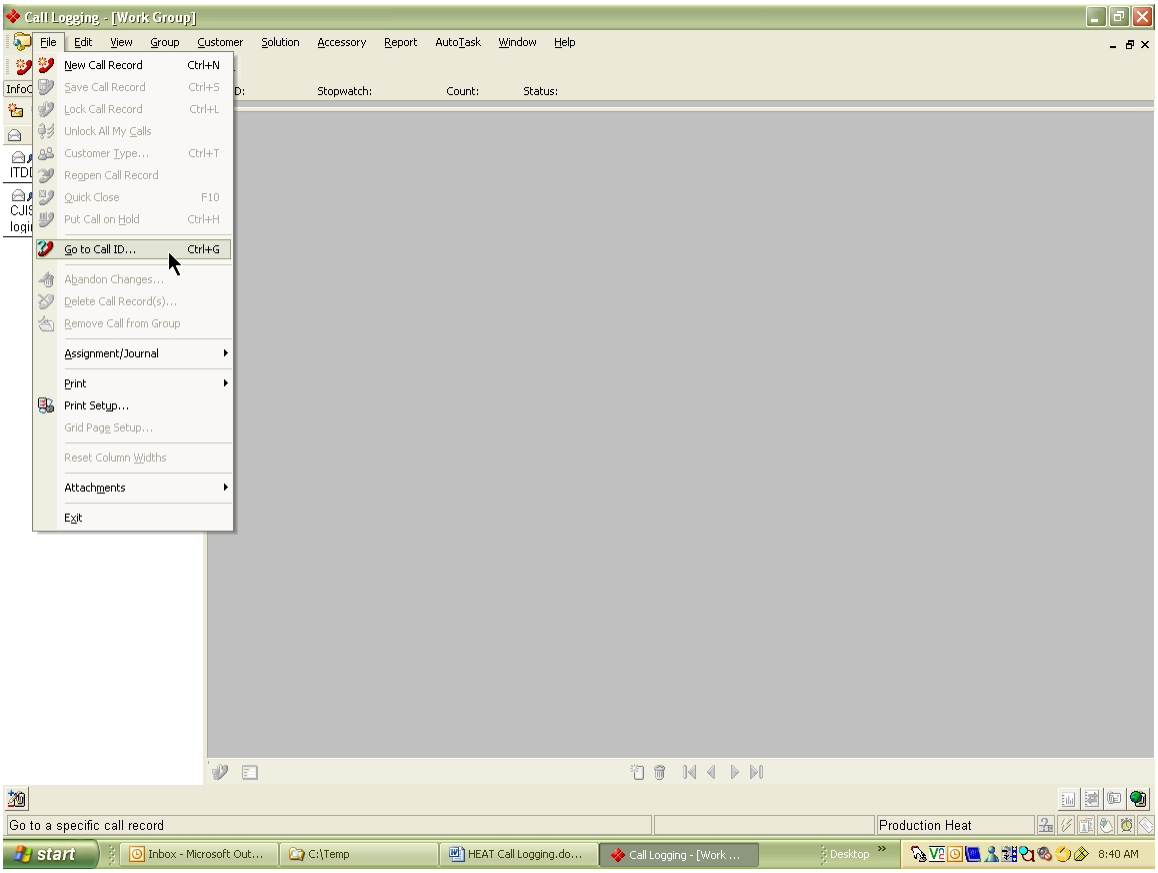
Starting Heat

Click on Start
Click on All Programs
Click on Heat
Click on Call Logging

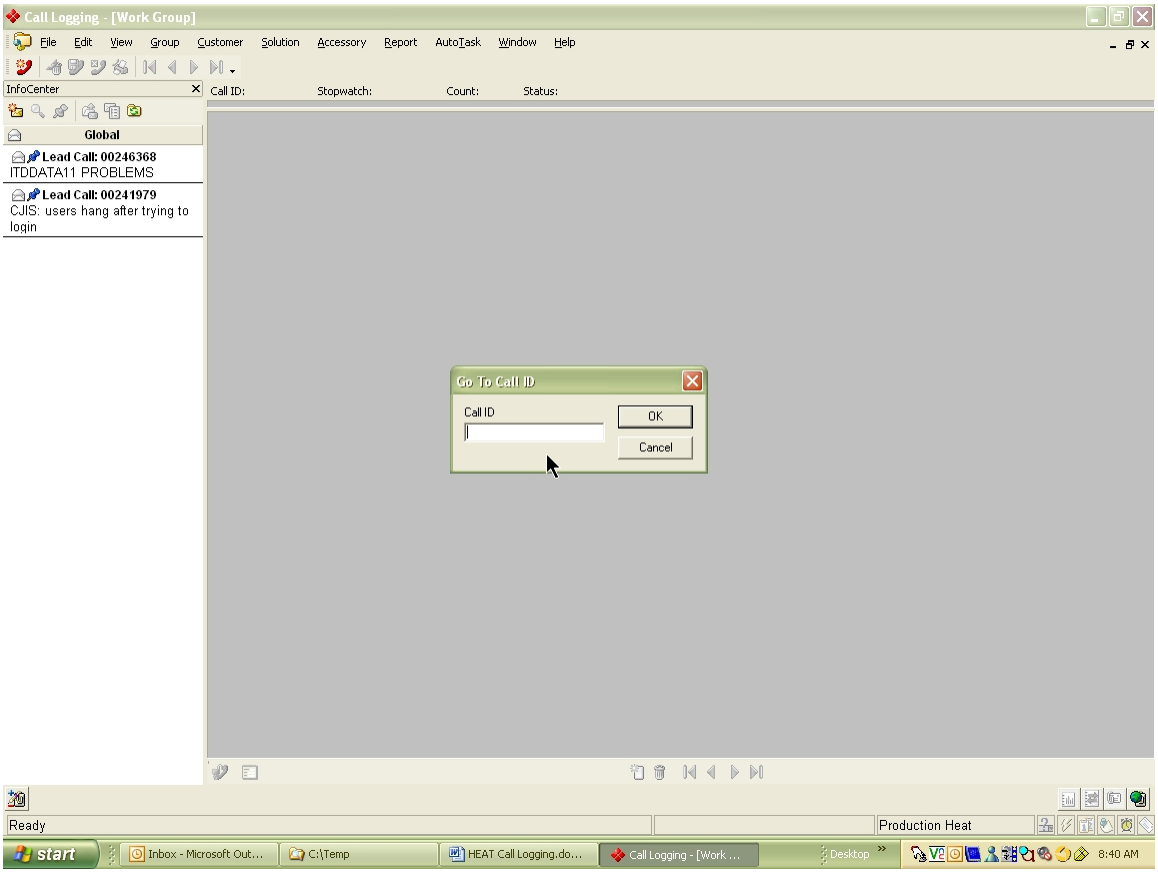


Find your Heat ticket

If you received an email that a ticket has been assigned to you, you will need to acknowledge that ticket by doing the following:
Click on File
Click on 'Go to Call ID'



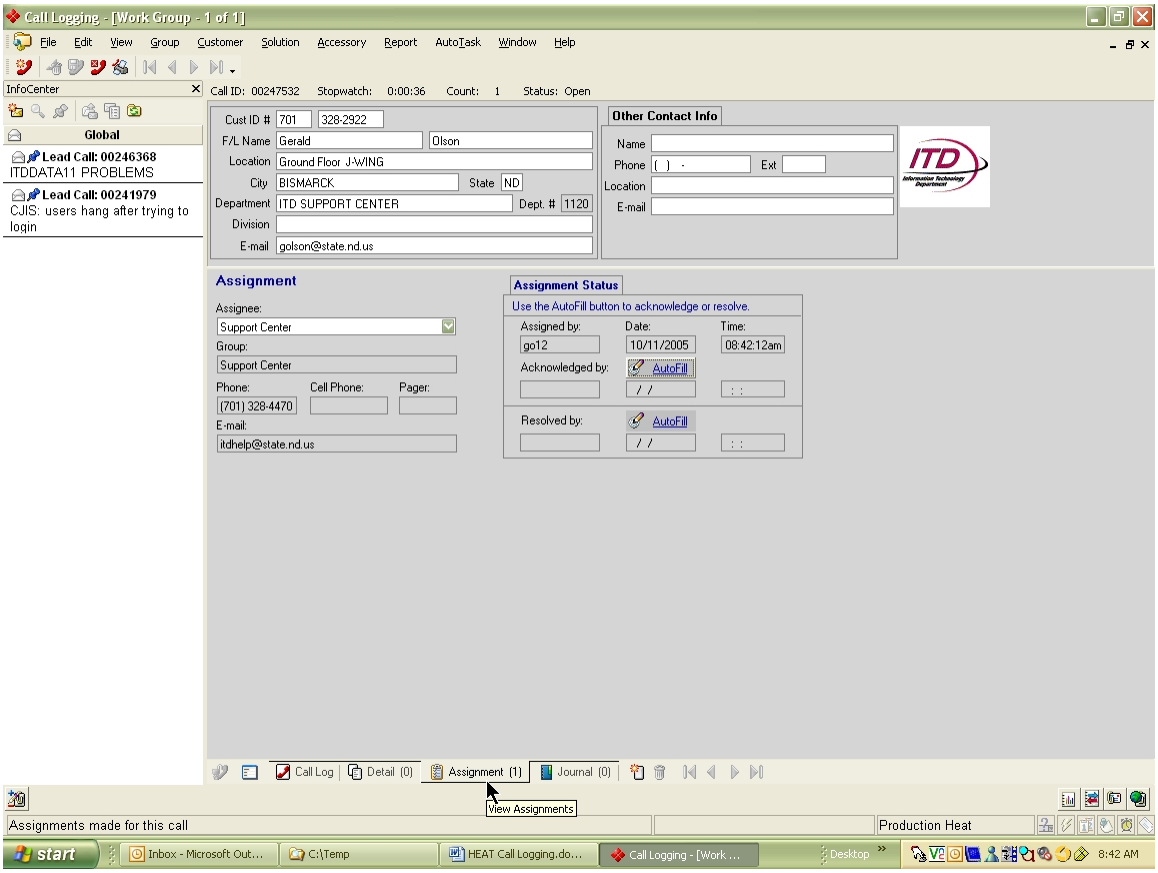
Enter the Call ID from your email, then click OK.



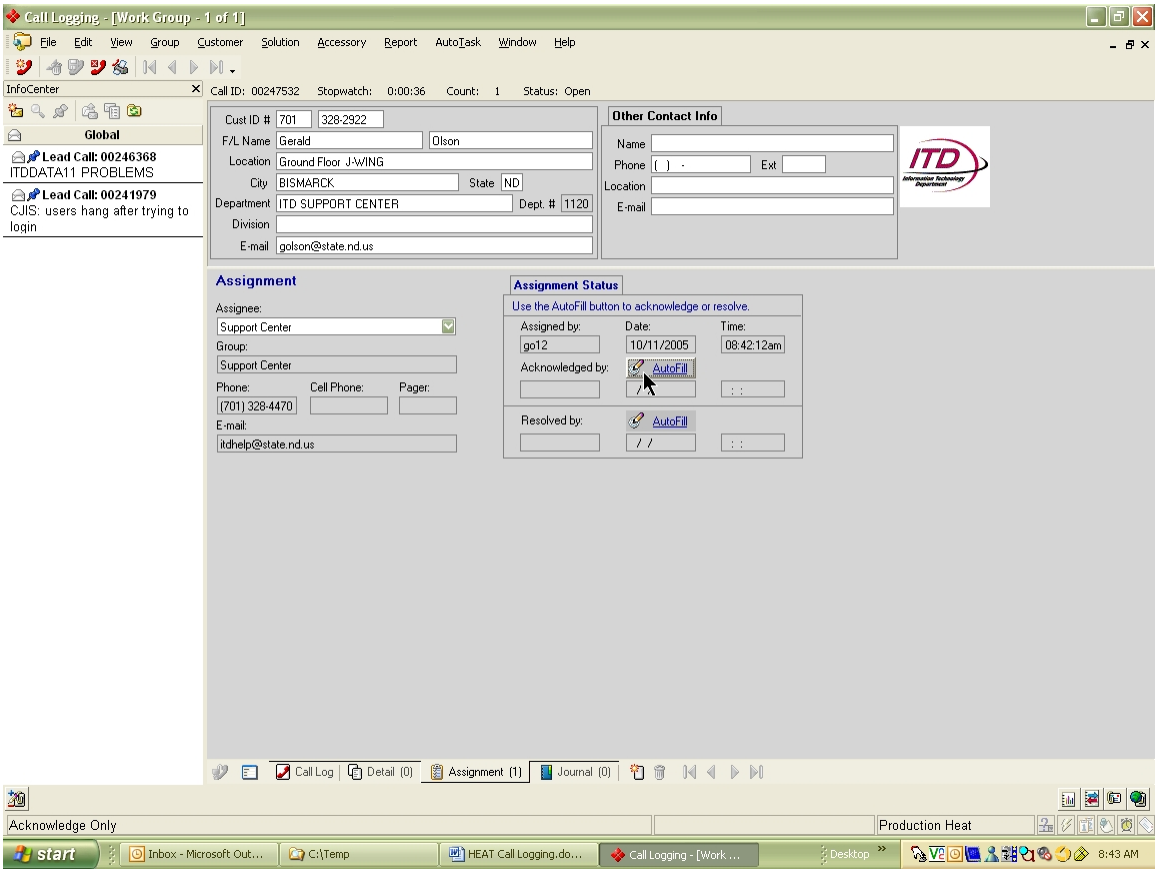
Acknowledge an assignment

To Acknowledge a ticket assigned to you or your team.

Click on the Assignment tab on the bottom of the screen. If the green arrows on the lower task bar are active then you need to go to the last assignment record.

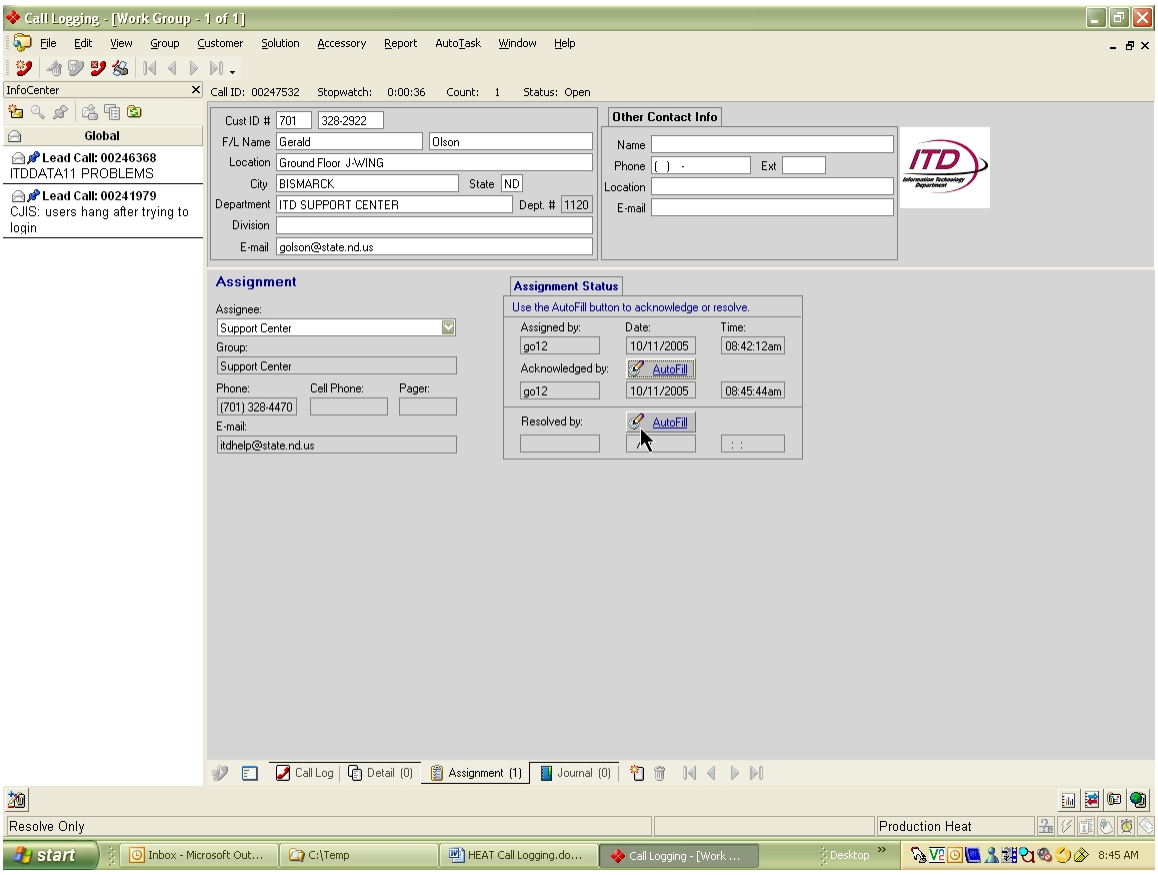


Click on the Acknowledged by: autofill button to acknowledge the assignment.

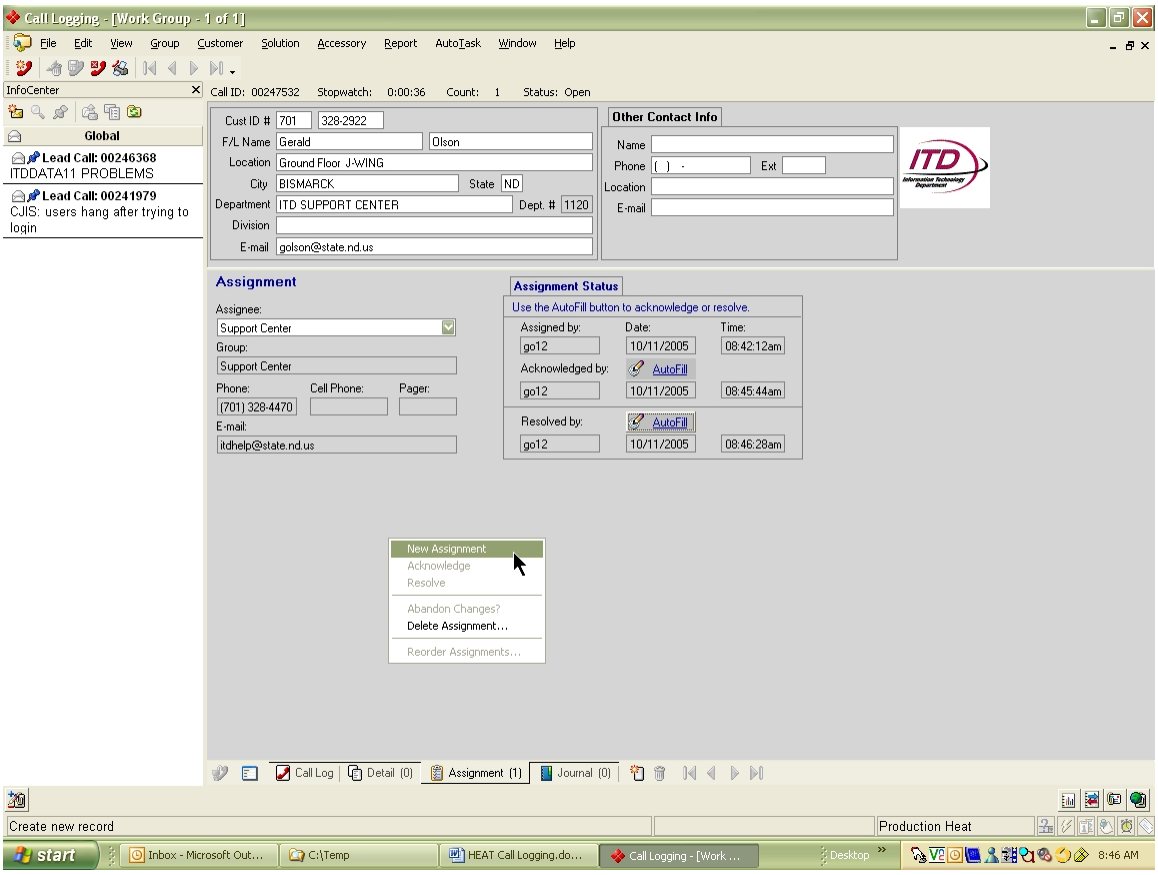


Reassign a ticket to yourself

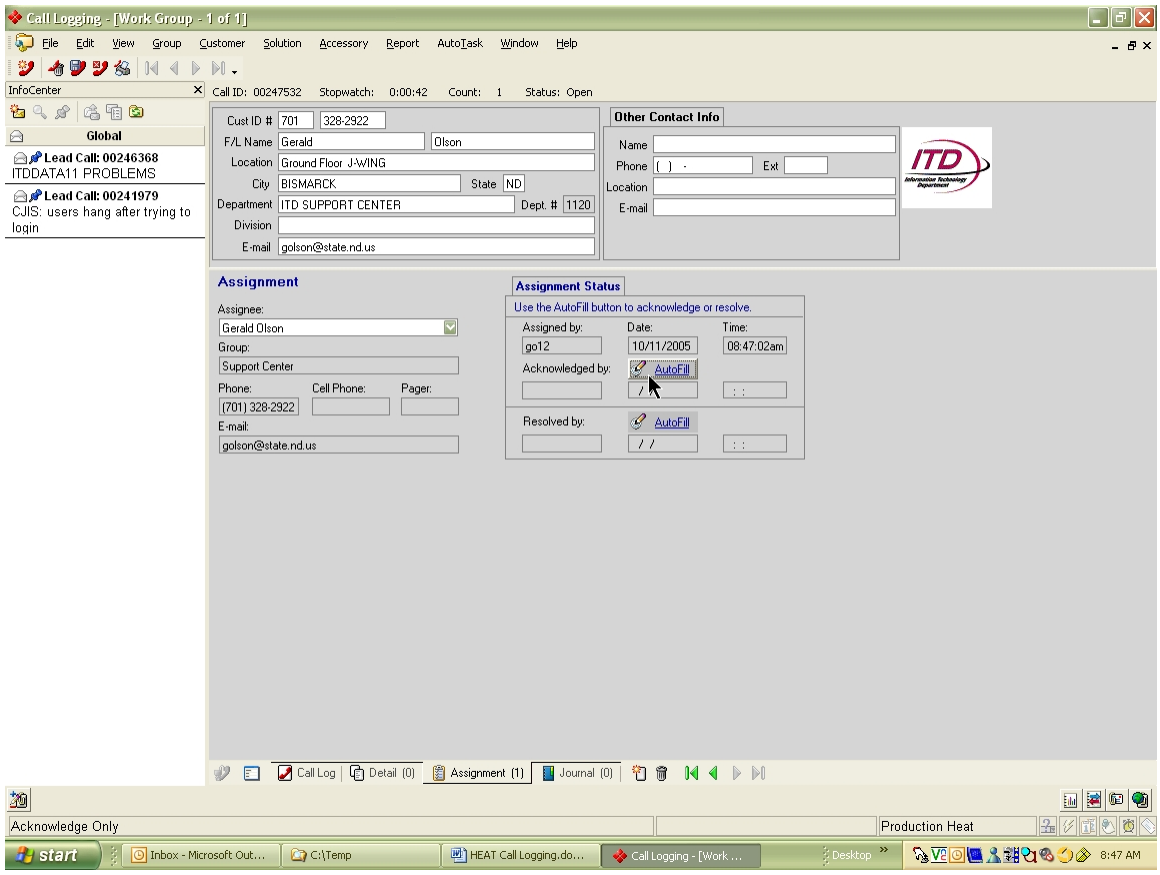
Click on the Resolved by: autofill button to resolve the last assignment.



Right click the mouse anywhere within the assignment portion of the screen and then click on New Assignment.

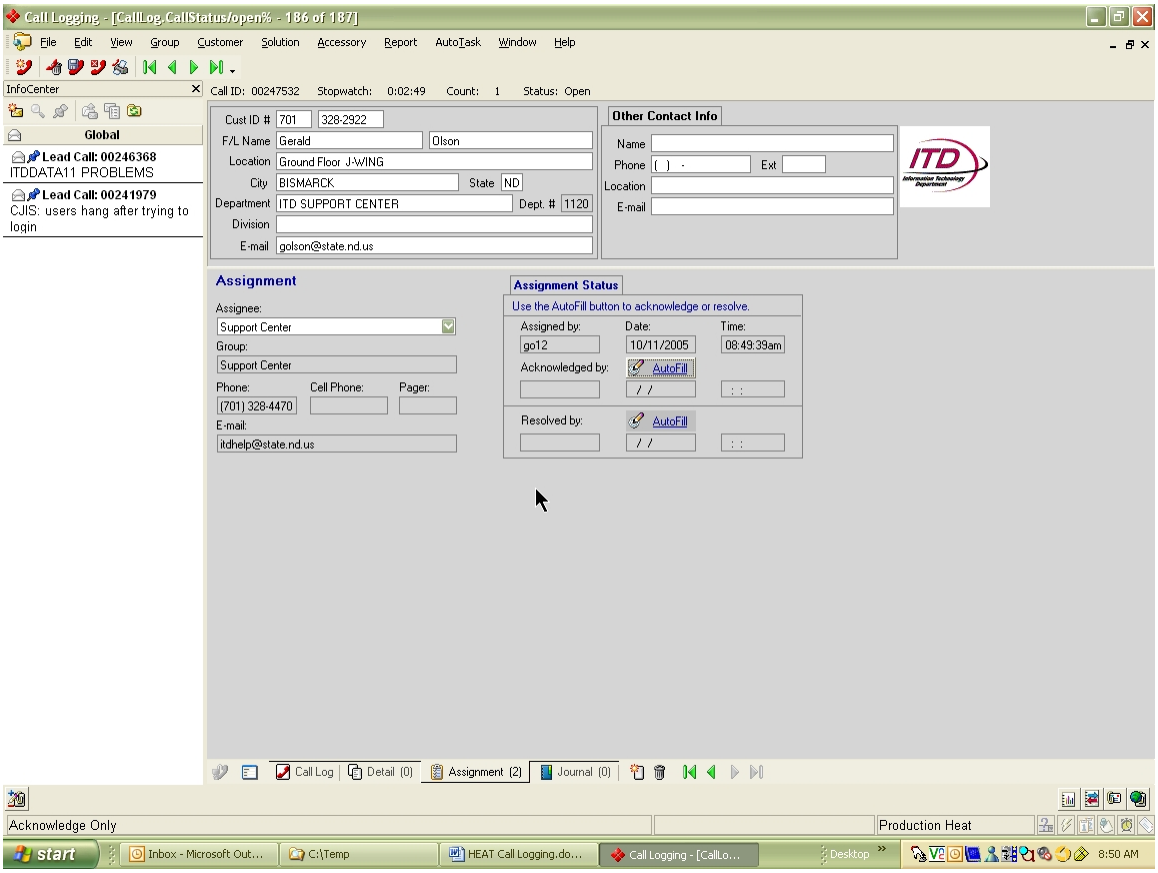


Type your name in the Assignee field and press the tab key.
Click on the Acknowledged by: autofill button to acknowledge the assignment.

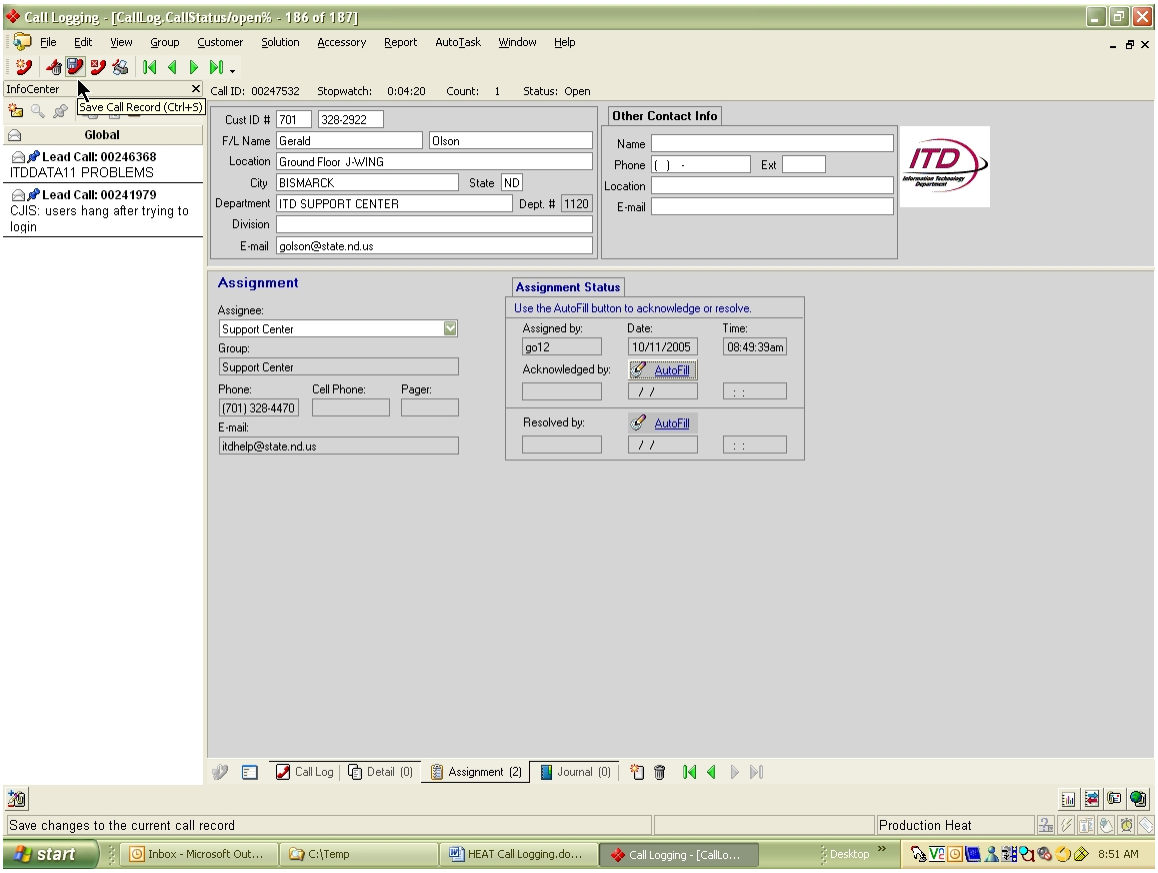


Reassign a Heat ticket to another group

Click on the Assignment tab on the bottom of the screen. If the green arrows on the lower task bar are active then you need to go to the last assignment record.
If the last Assignment record has not been acknowledged, click on the Acknowledged by: autofill button.
Click on the Resolved by: autofill button.
Right click the mouse anywhere within the assignment portion of the screen and then click on New Assignment.
You now need to determine which team the ticket needs to be assigned to. I.e. (Calls assigned to Development that need to be reassigned to someone on the Support Center team should be reassigned to Support Center. Enter the group name in the Assignee field and press the tab key. You can also click on the down arrow key and select the group you want.



Click on the Save Call Record icon.

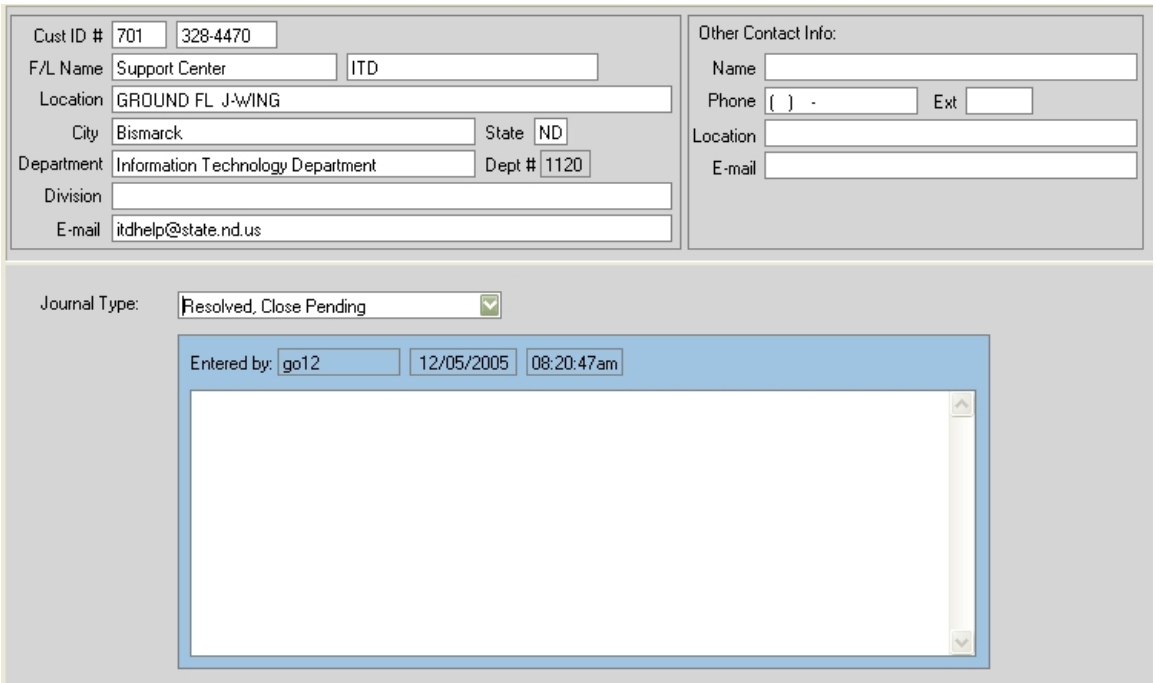


Journal Notes

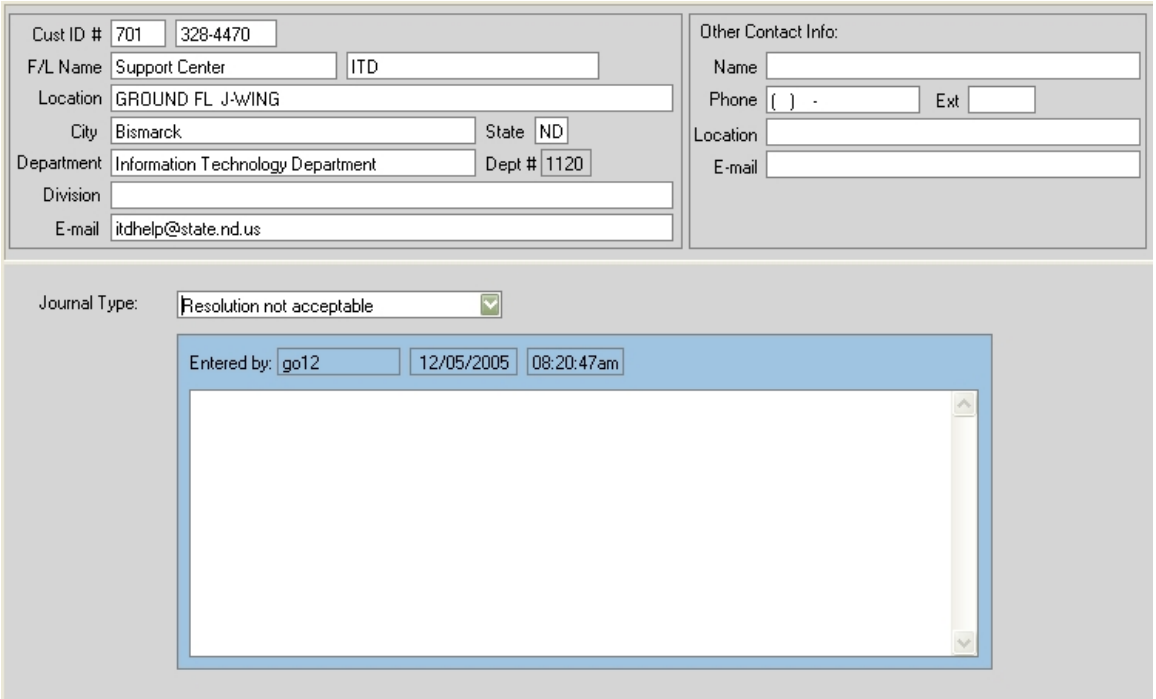
There are four types of Journal Notes:
Notes
Resolved, Close Pending
Technical Notes
Resolution not acceptable

Information entered with a type of 'Notes' or 'Resolved, Close Pending' or 'Resolution not acceptable' will be sent to the Customer.
Information entered with a type of 'Technical Notes' will **NOT** be sent to the Customer.

Responsiveness reporting is assisted by the use of 'Resolved, Close Pending'. The system determines how long it took you to respond back to the customer with a fix to the problem. Using this journal note allows you to record that you have contacted the customer and have a fix for them but you want to leave the incident open for a period time to allow the customer to verify that the problem has been resolved. If no 'Resolved, Close Pending' journal is found then the Close date is used for reporting purposes.



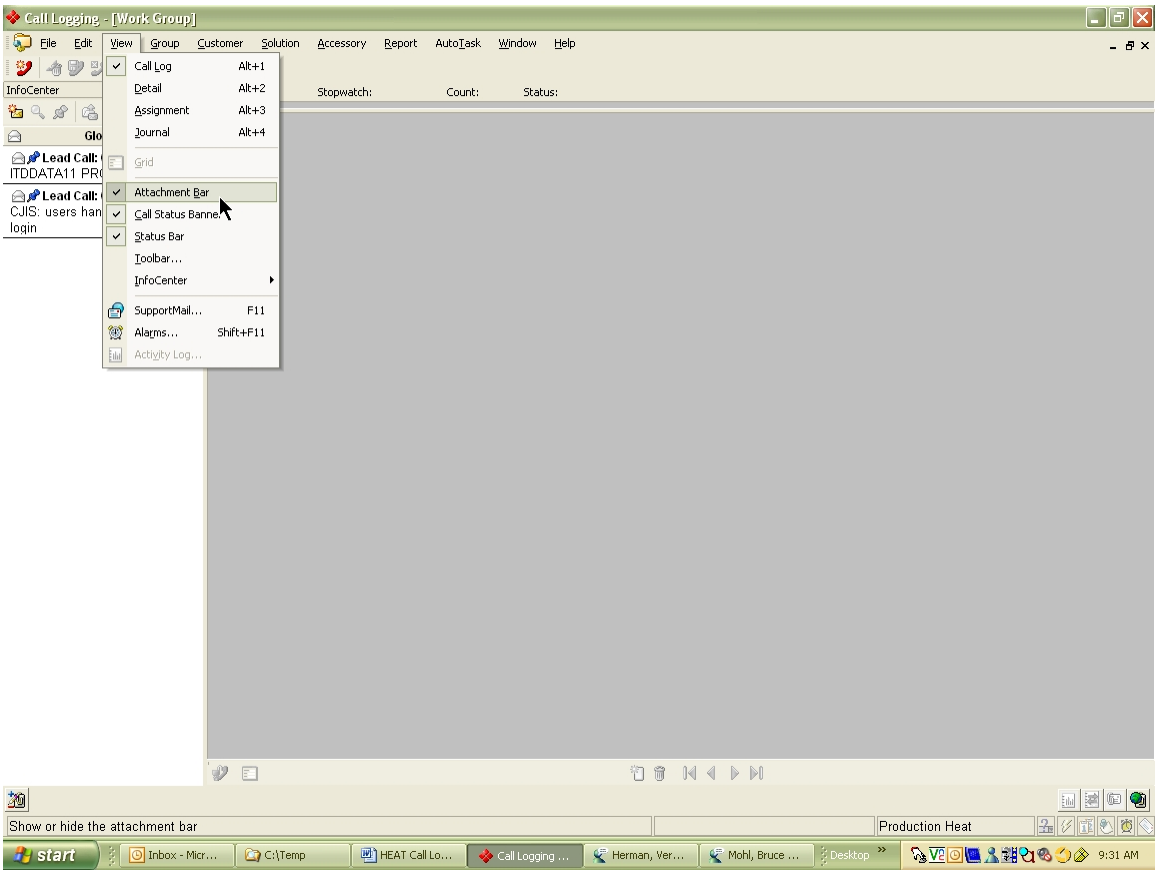
Resolution reporting is assisted by the use of 'Resolved, Close Pending' and 'Resolution not acceptable'. The system determines how long it took you to resolve the incident by the Close date if no 'Resolved, Close Pending' journal is found, if one is found then the system determines the length of time based on the last 'Resolved, Close Pending'. 'Resolution not acceptable' is used when a Customer communicates back that the fix did not work. At that time the journal note would be created and Resolution reporting would be listed as either to the next 'Resolved, Close Pending' or the Close date.



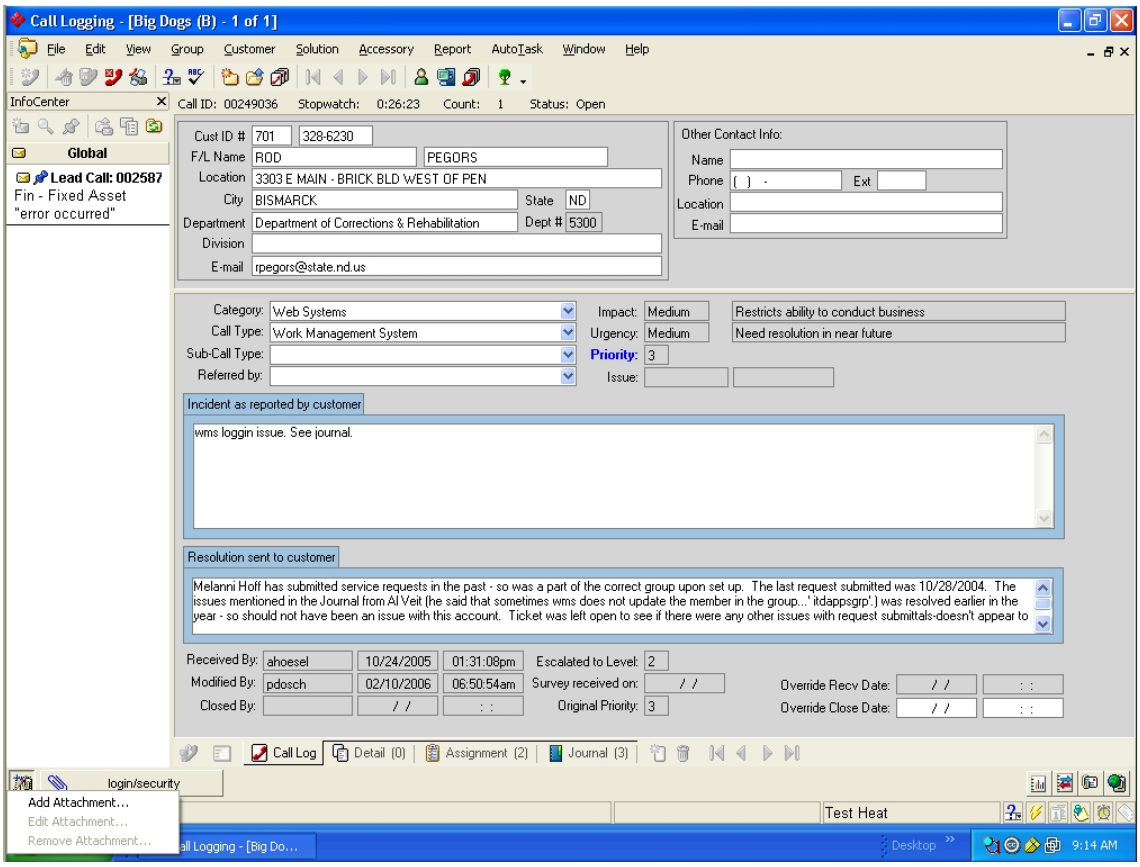
Using Attachments

Any file(s) can be added to a Heat ticket, which in turn can be viewed by anyone who has access to that ticket. Deleting of attachments can only be done by the Service Desk.

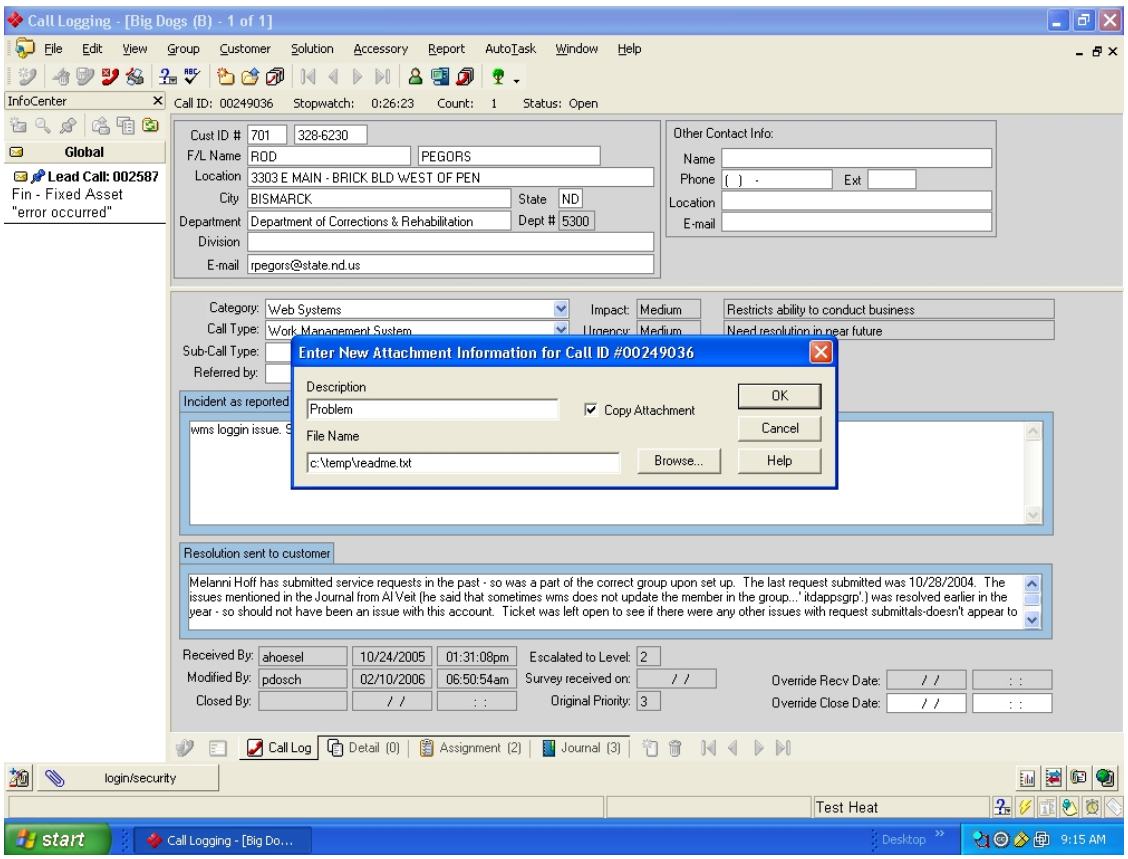
To use Attachments, you must first turn on the Attachment task bar in Call Logging. To do this, click on 'View' on top of the window, then click on 'Attachment Bar'. You should now see a checkmark next to 'Attachment Bar' and see the Attachment task bar at the bottom of the Call Logging window.



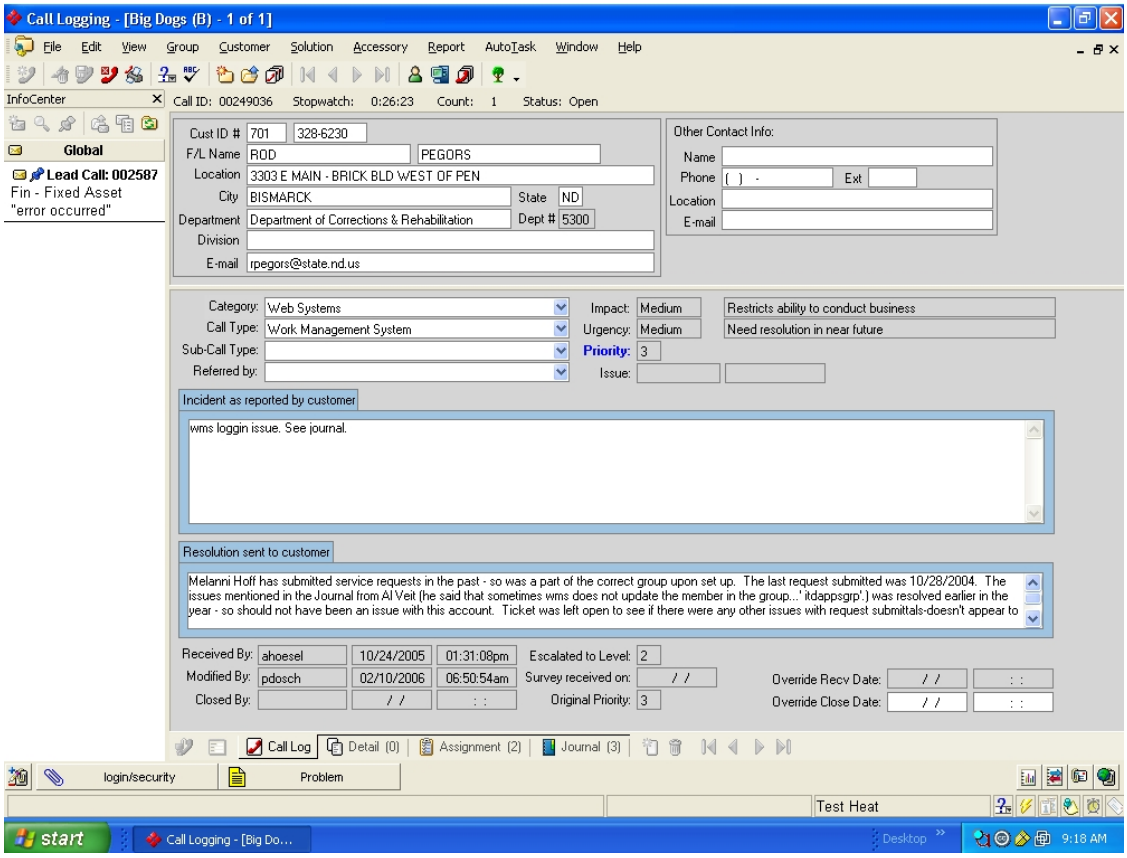
To add an attachment, you must first go to the Heat ticket that you want the attachment added to, then click on the 'Display Attachment Bar Menu' icon in the lower left corner of the Call Logging window, then click on 'Add Attachment'.



Enter the text you want on the button in the description field, then browse to the file you want to add, and then click OK. Do NOT remove the checkmark from 'Copy Attachment', doing so will place the attachment on your pc and not the server.

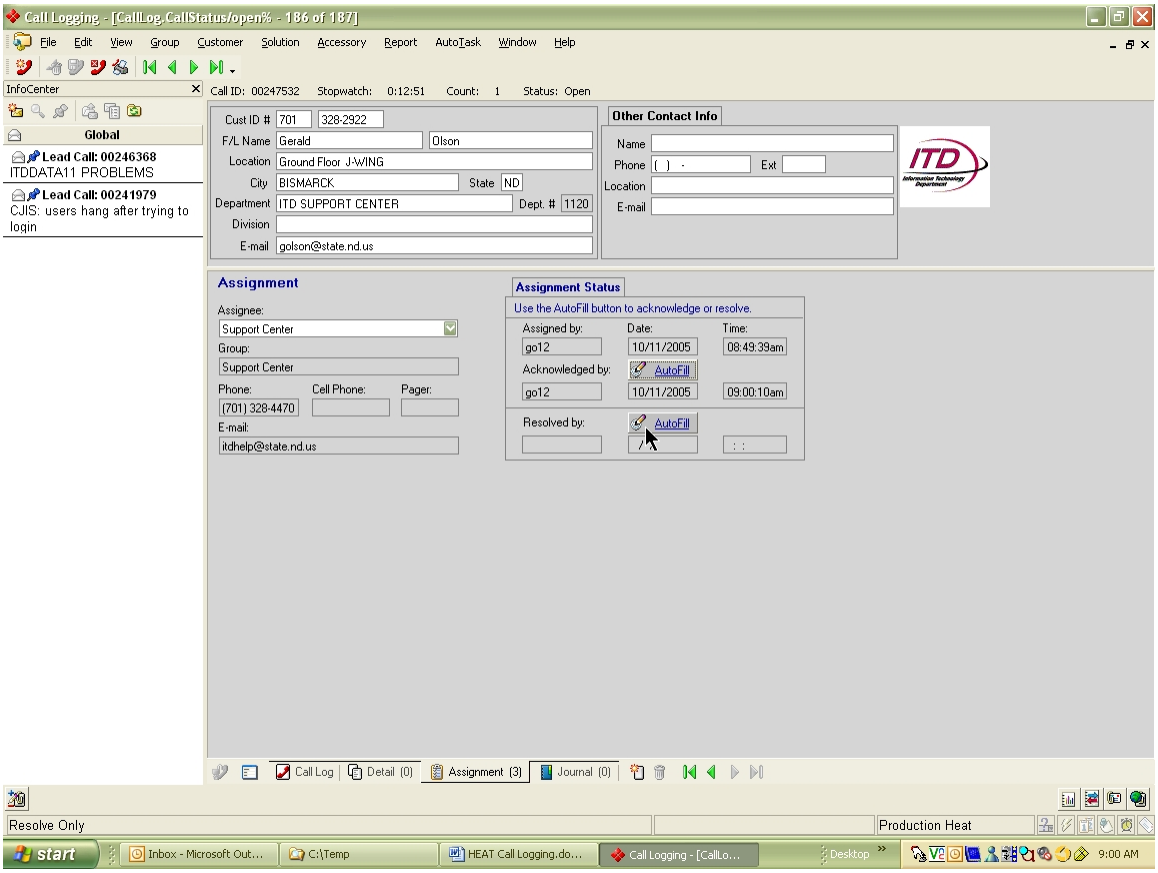


You should now see the button in the Attachment task bar that you just added.
Click on the button to view the Attachment.

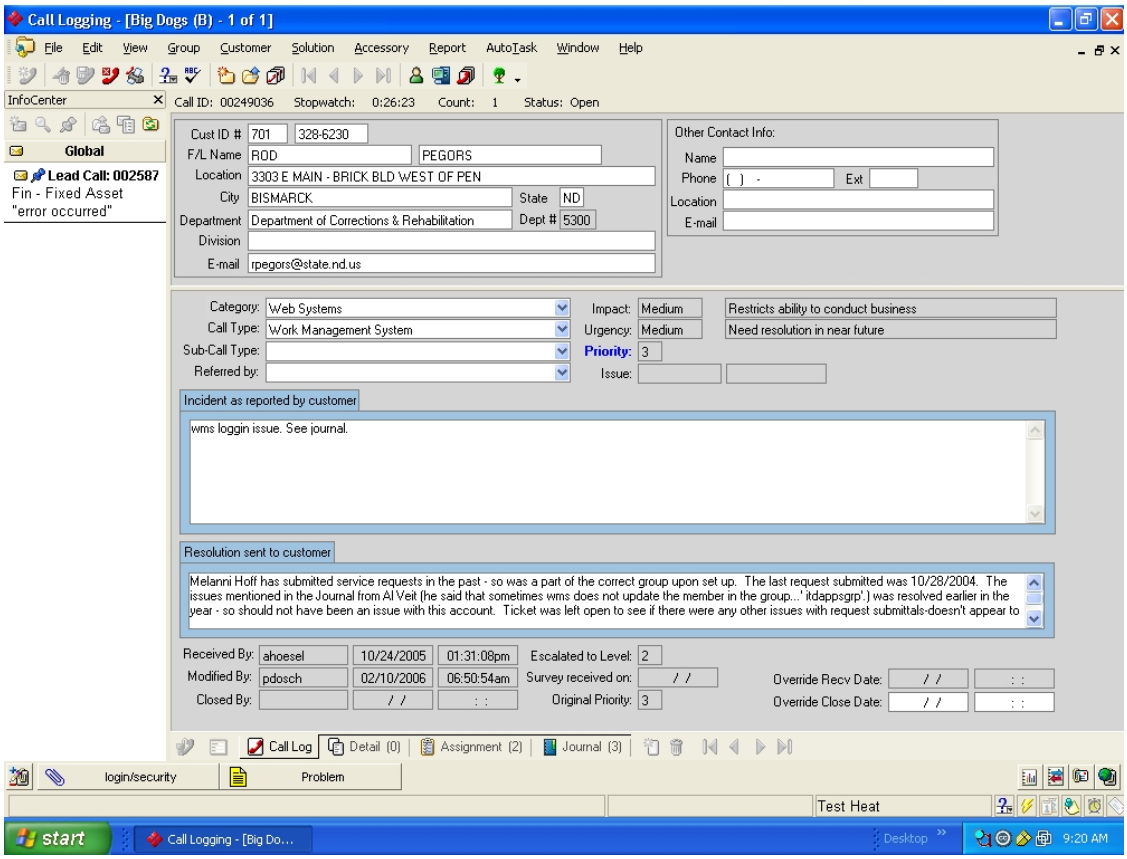


Close a Heat ticket

Click on the Assignment tab on the bottom of the screen, go to the last assignment.
Click on the Resolved by: autofill button.



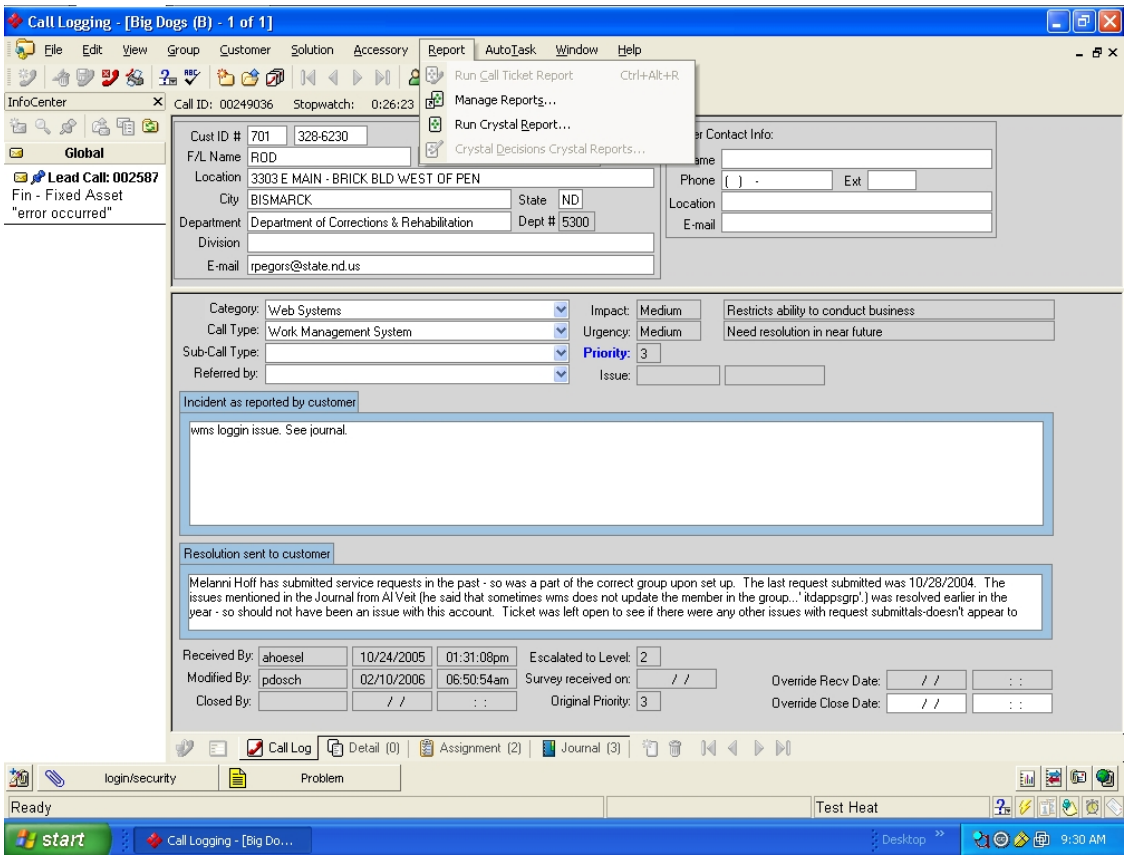
Click on the Call Log tab on the bottom of the screen.
Type in your resolution information in the Resolution sent to customer field.
If you need to override the Close date and time you may enter that now, this should be used when you have worked on an incident while oncall or After Hours and you need to enter the appropriate Close date and time rather than the current date and time.
Click on the Quick Close icon.



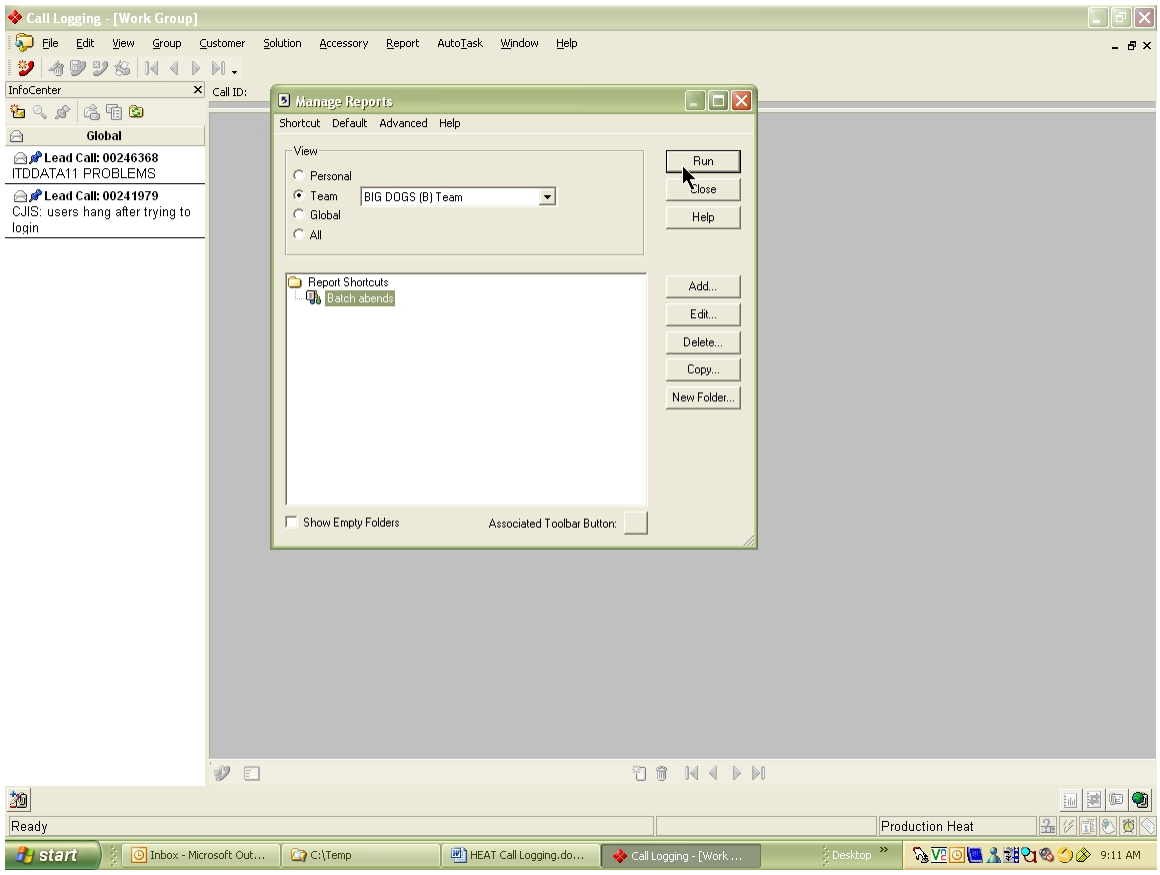
Running a Crystal report within Heat

*Note: Running a report in Heat is controlled by the Security Role that you have. If you do not see any reports and feel you should please contact the Service Desk.

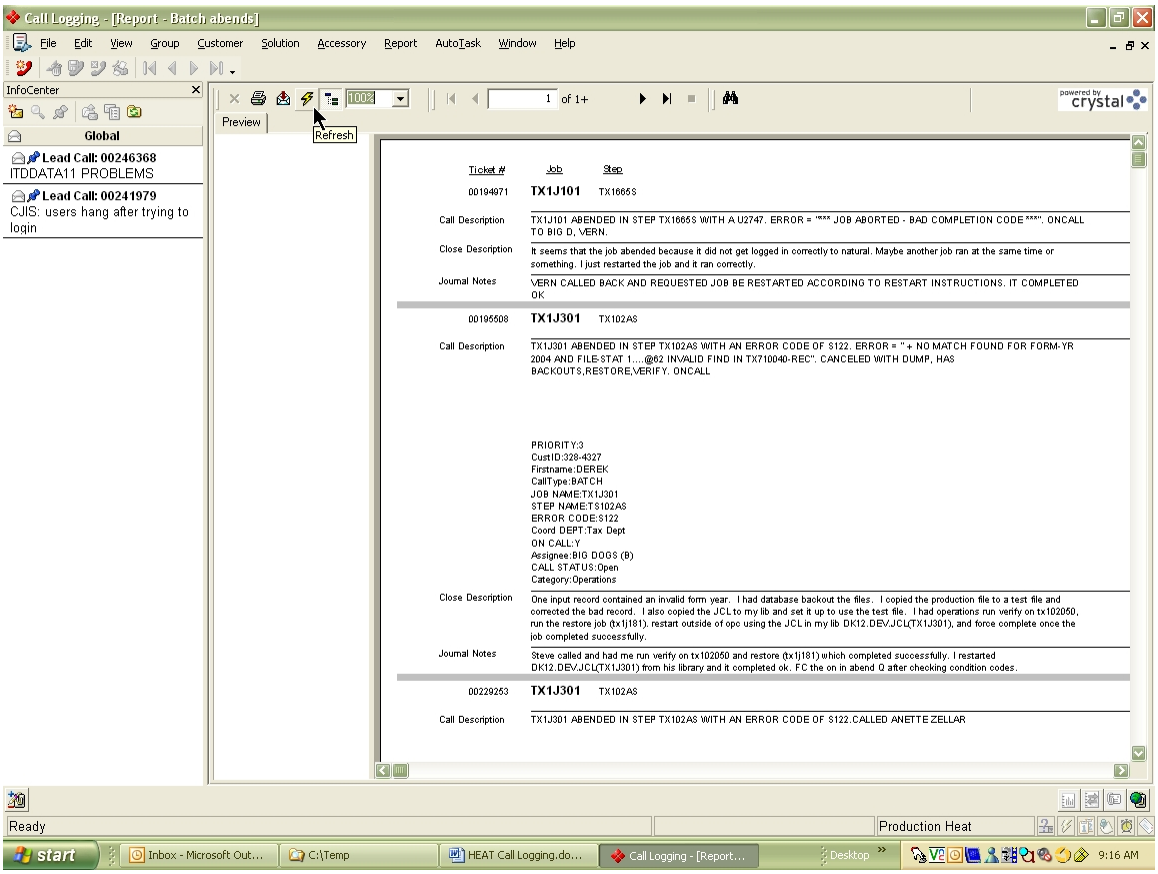
Click on the Report pull down menu.
Click on Manage Reports.



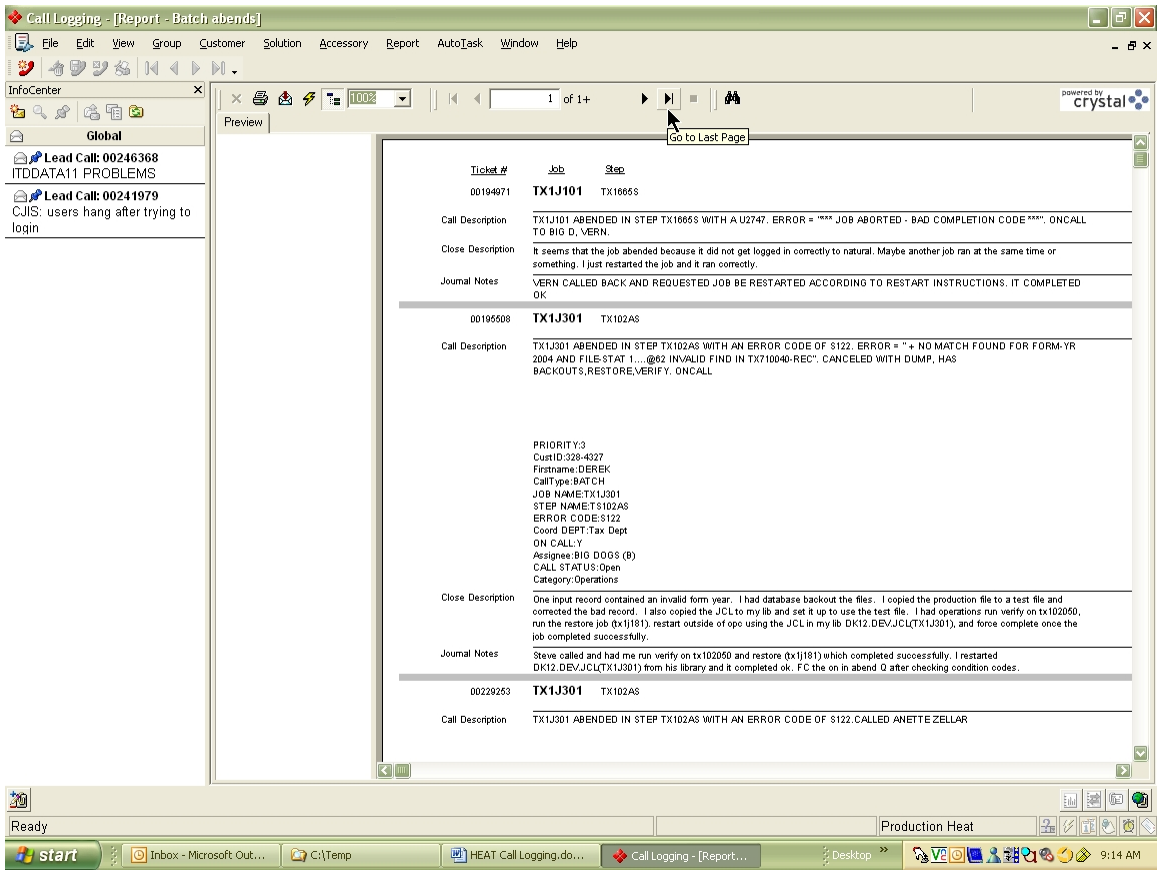
Select the report from the list and click run.



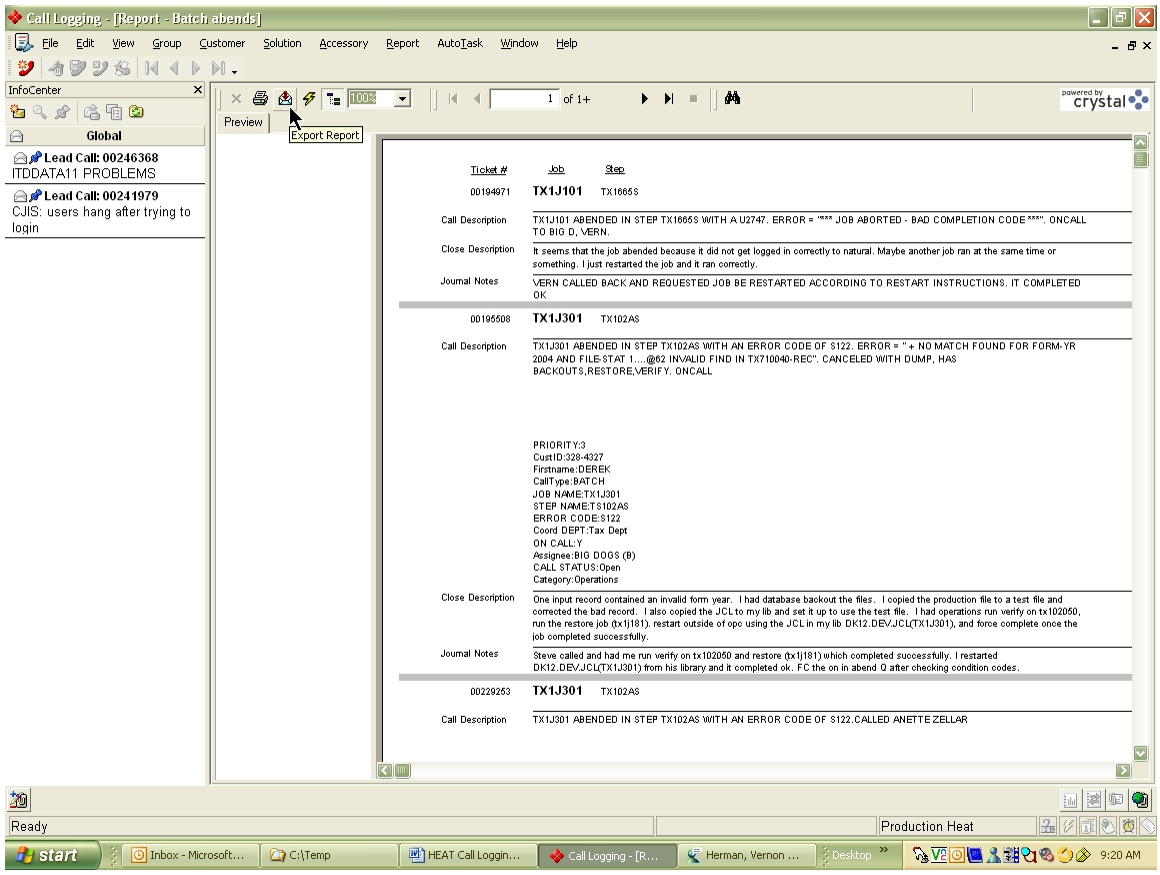
*Note: Reports are stored with data, meaning what you see at first is data from an older run. You need to refresh the data by clicking on the lightning bolt icon. If there are parameters to be entered the program will ask for those at this time.



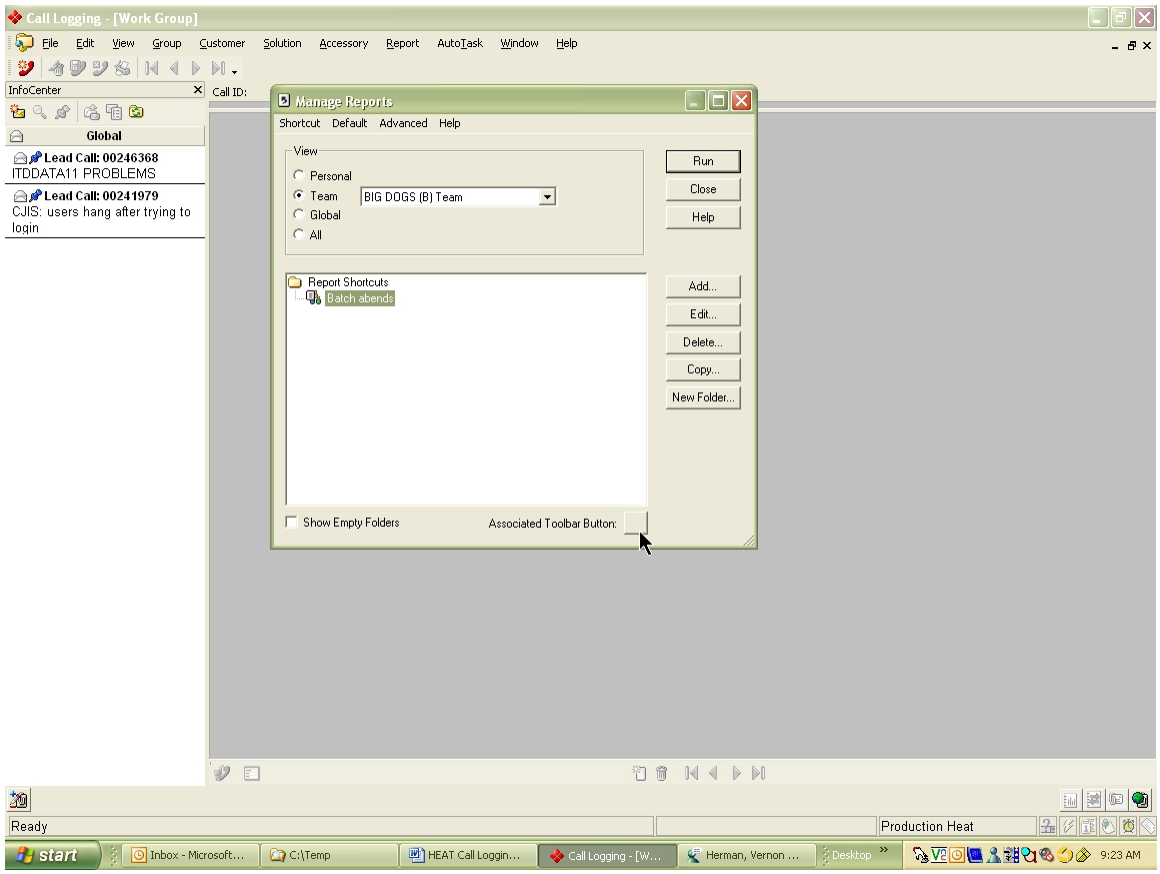
*Note: To make sure that the report has completed before printing make sure you click on the right arrow to force the program to show you the last page. Some reports have subreports that may not totally finish until you do this.



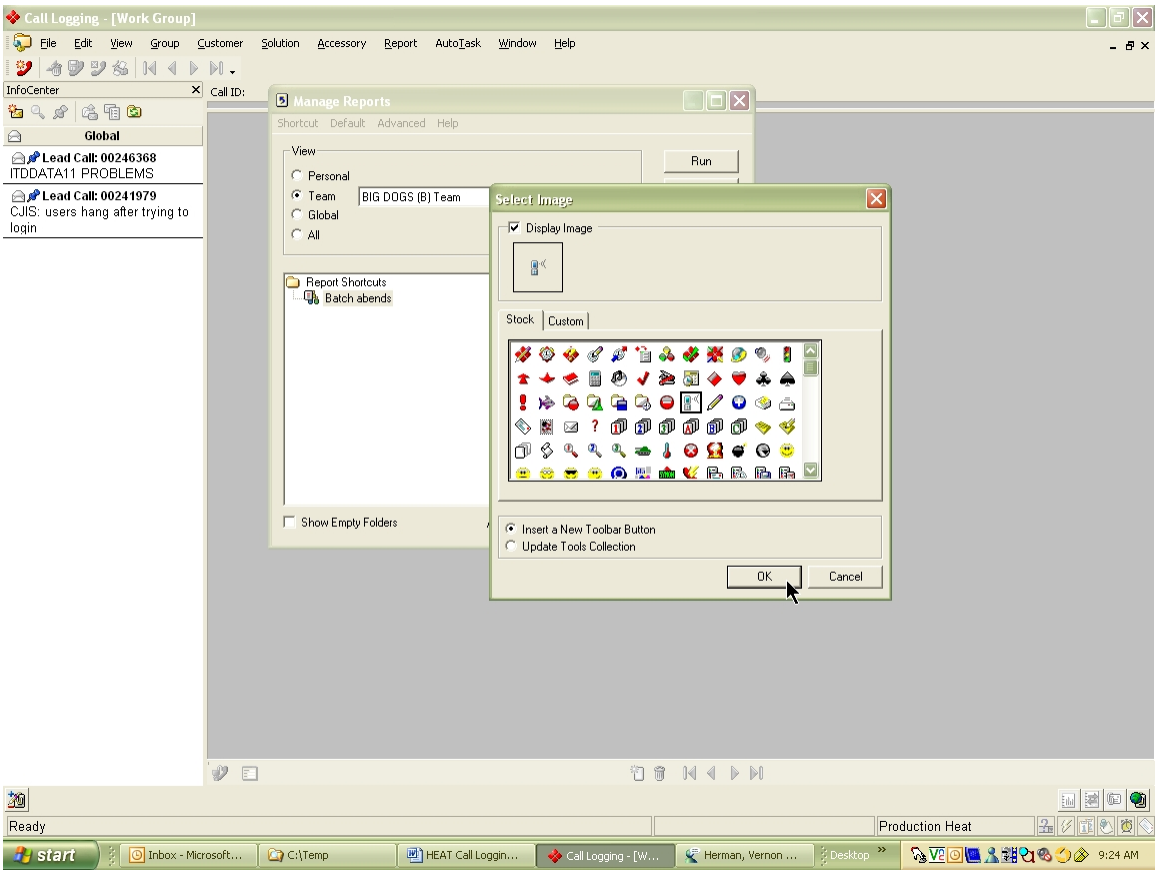
You can now view the report, print the report or by clicking on the envelope icon next to the lightning bolt you can export a .pdf file of the report.



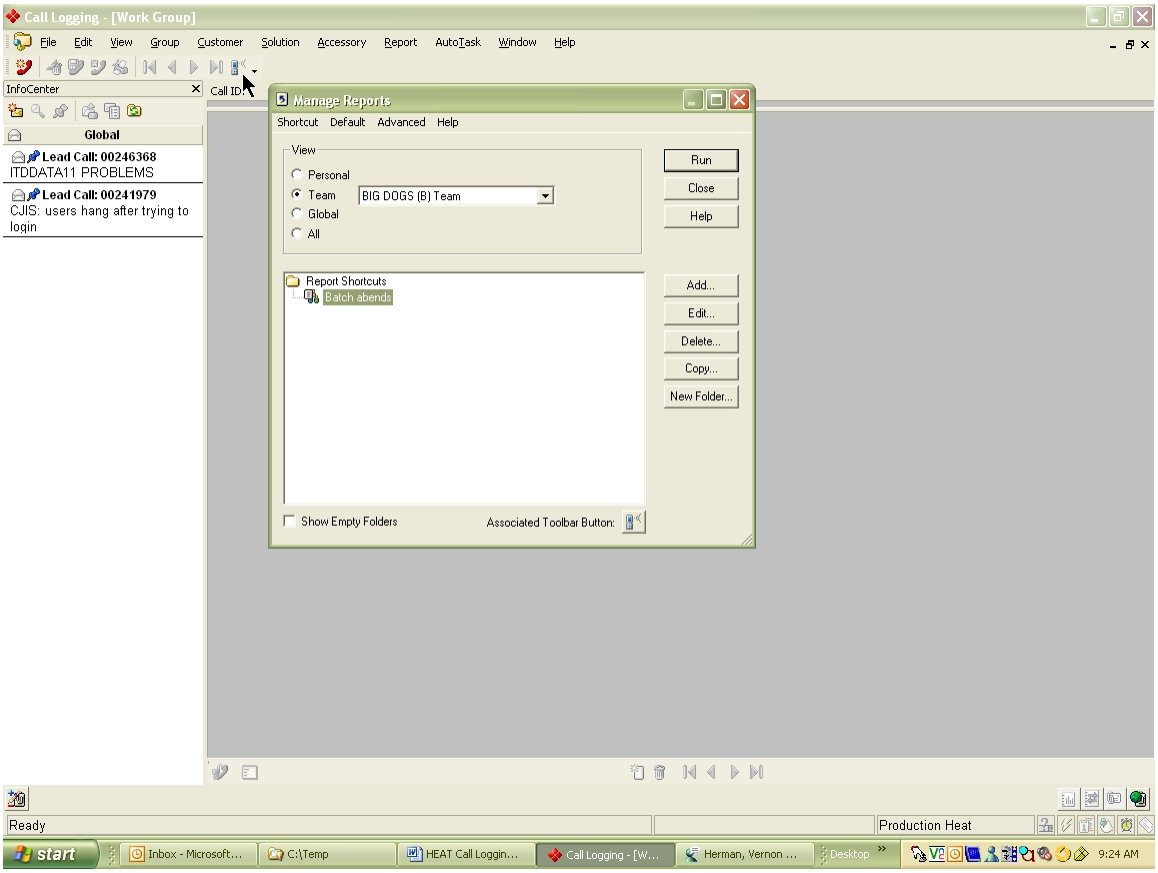
If you print this report often you can create a shortcut to that report by:
After you select the report
Click on associated toolbar button



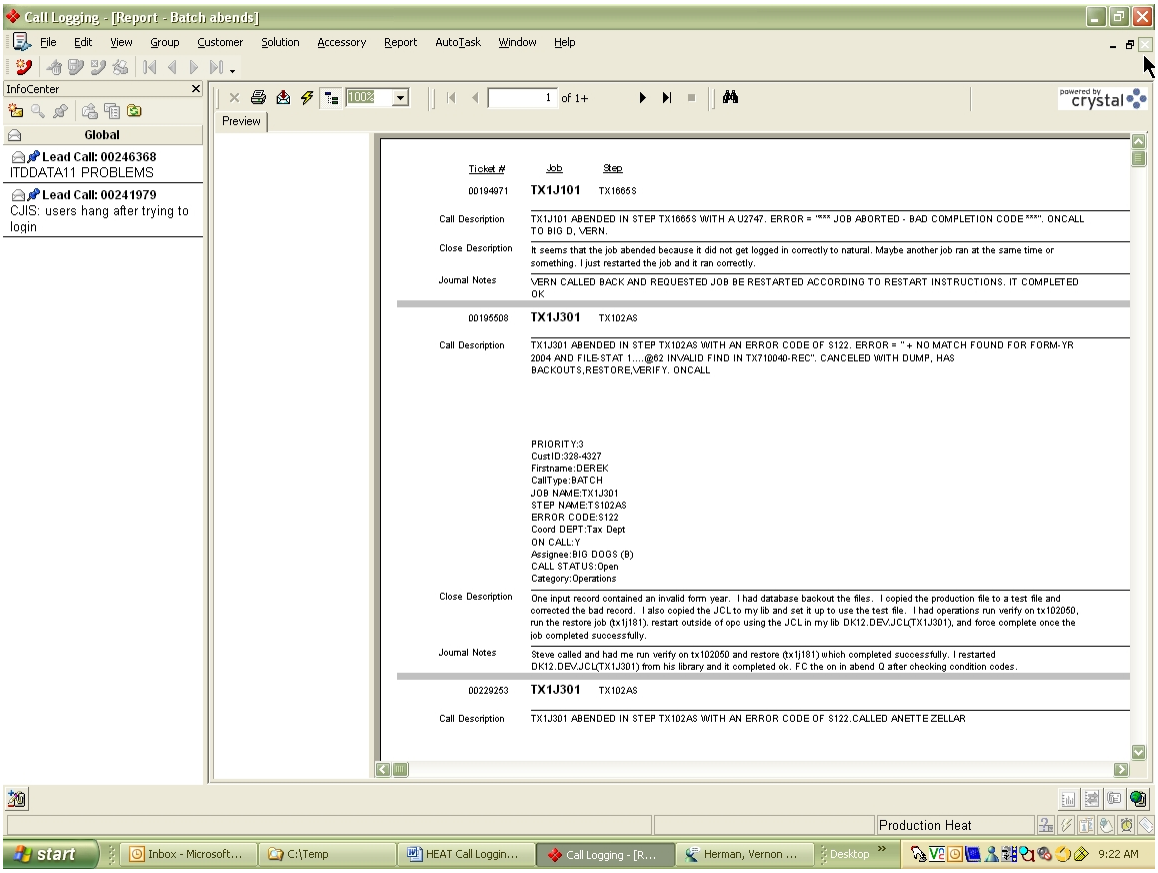
Select an icon
Click ok



Now you can just click on the icon in the toolbar each time to start the report.

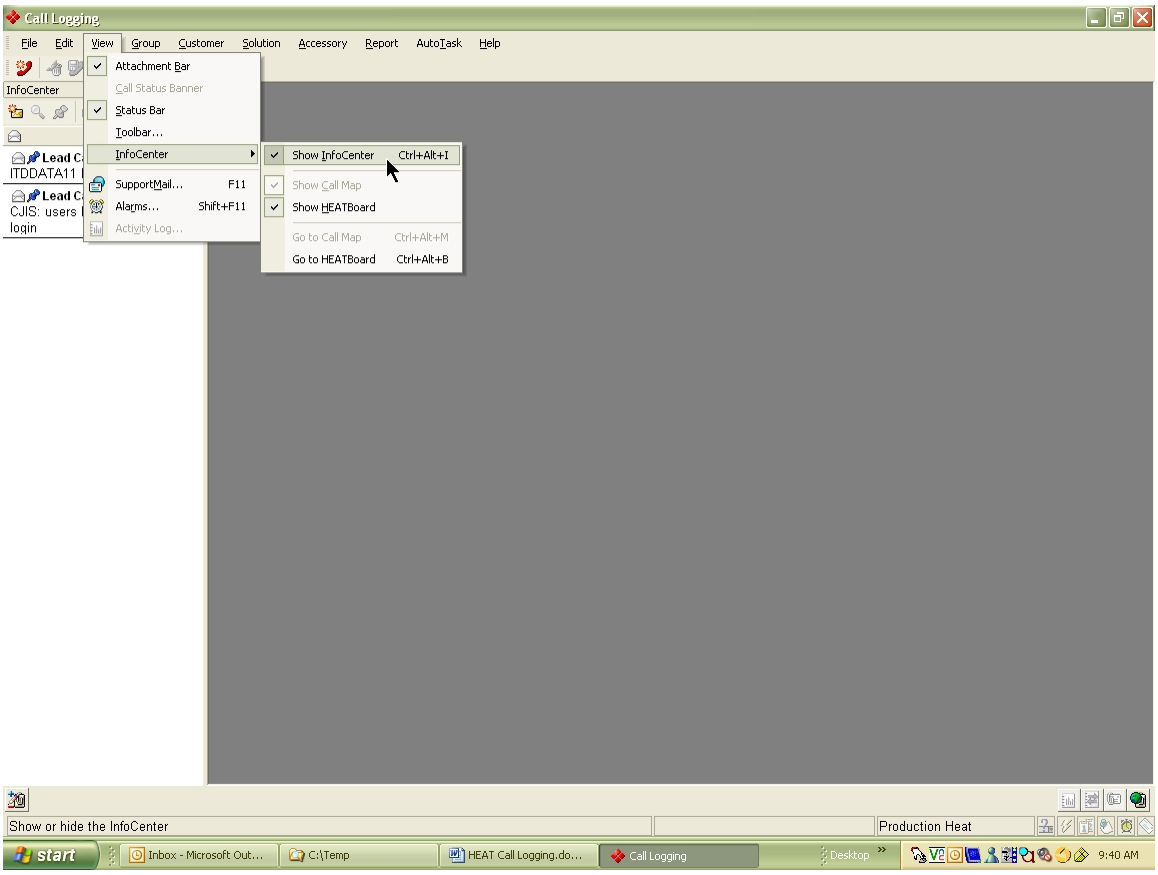


To close the report just click on the lower X in the upper right corner of the screen.

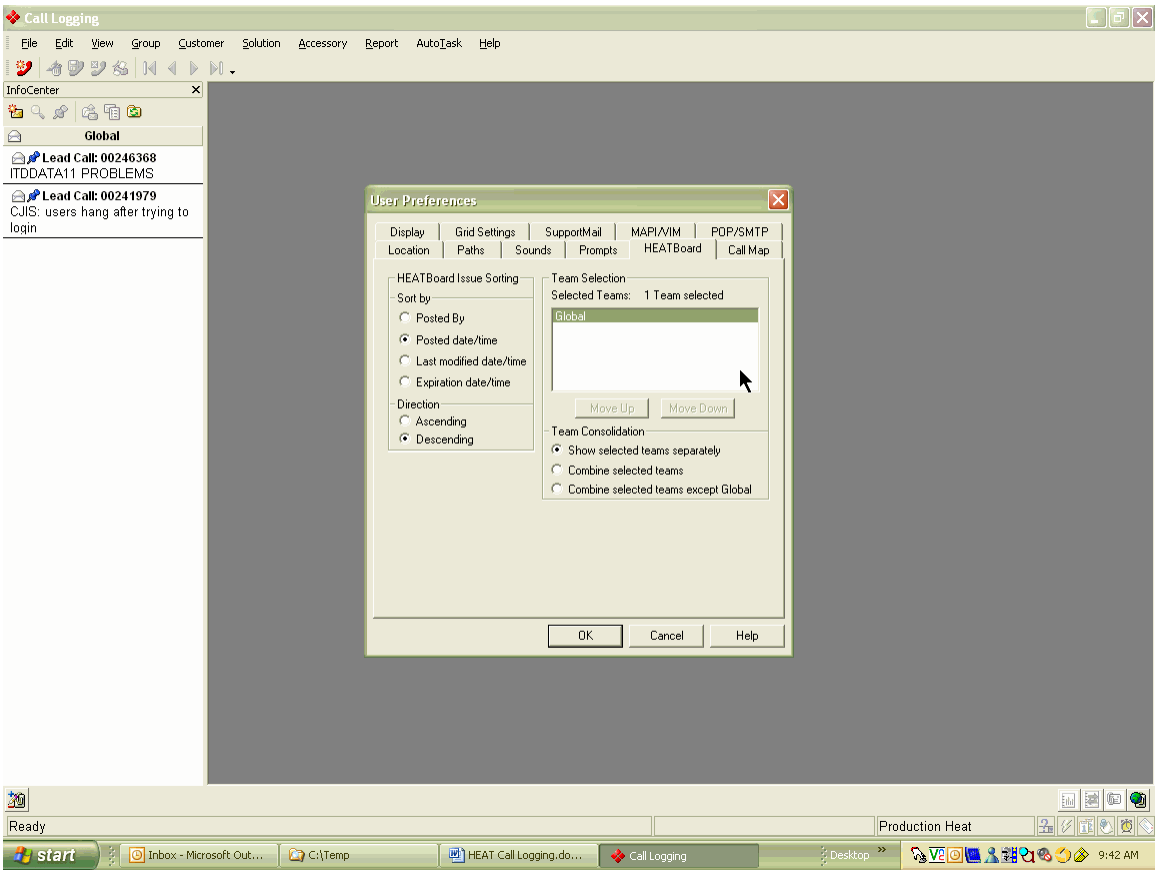


Viewing Heat major issues

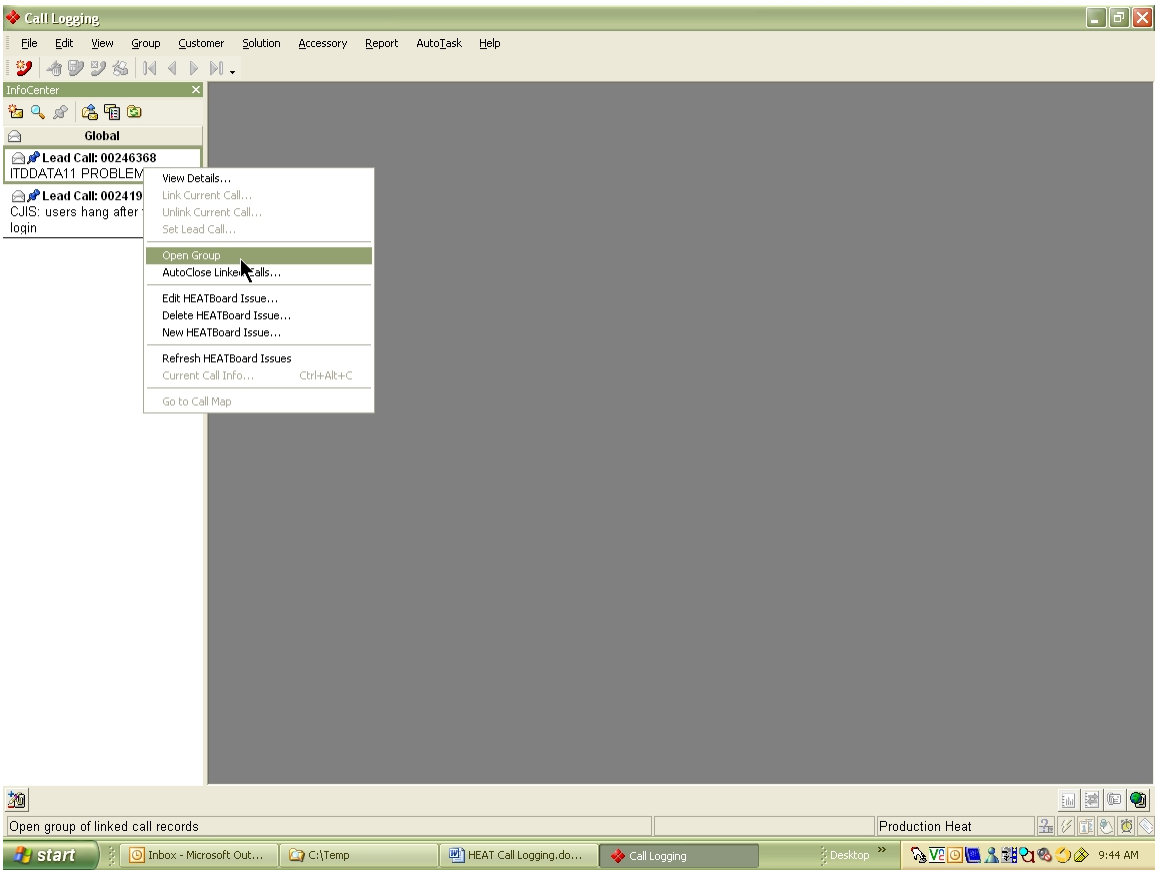
When the Service Desk determines that more than one call is related to a problem they will create an Issue using the Heatboard. These Issues will contain all Heat tickets with the same problem, when the Issue is resolved then all Heat tickets will be closed. To view an Issue you need to do the following steps:
Turn on InfoCenter
Click view
Click InfoCenter
Click show InfoCenter



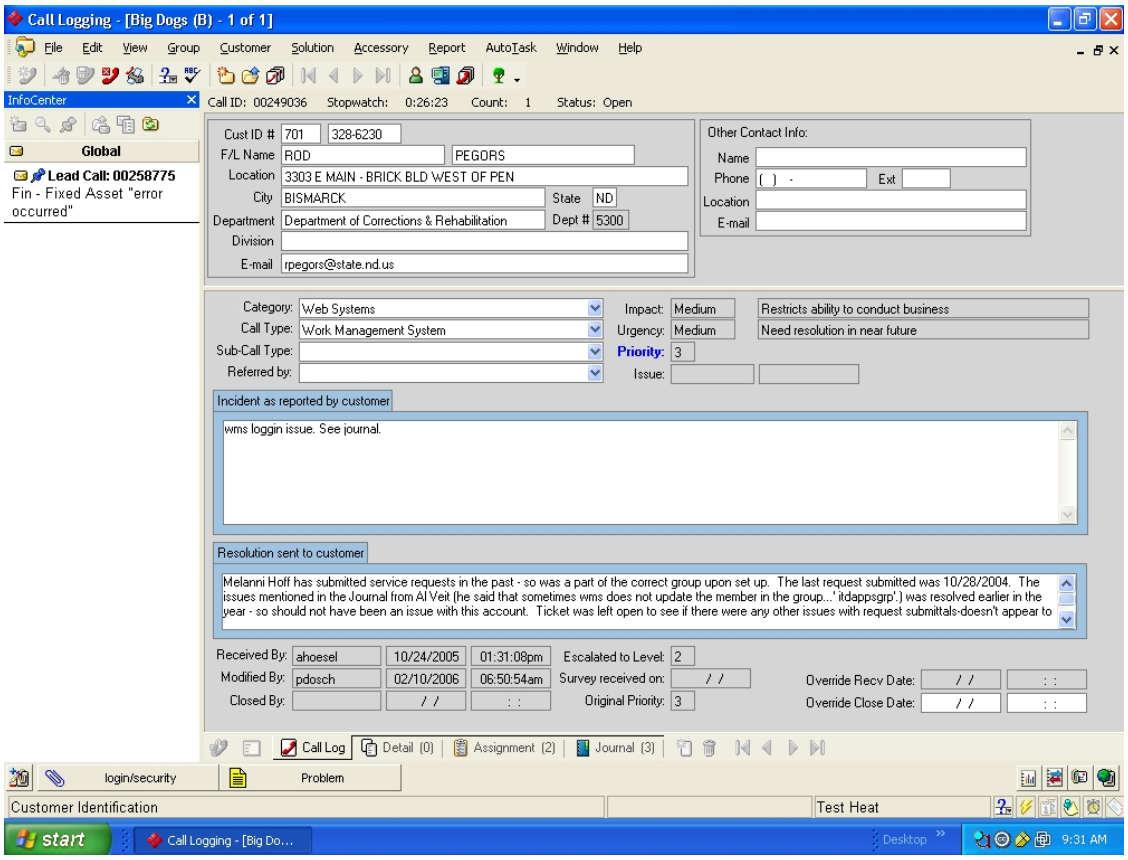
Modify Call Logging to view ‘Global’ HeatBoard issues only.
Click on ‘edit’
Click on ‘User Preferences’
Click on the HeatBoard tab
Highlight Global only
Sort by = posted date/time
Direction = descending
Team Consolidation = show selected teams separately.
Click ok



To see all incidents for an issue
Right click on the lead call within the Heatboard
Click open group



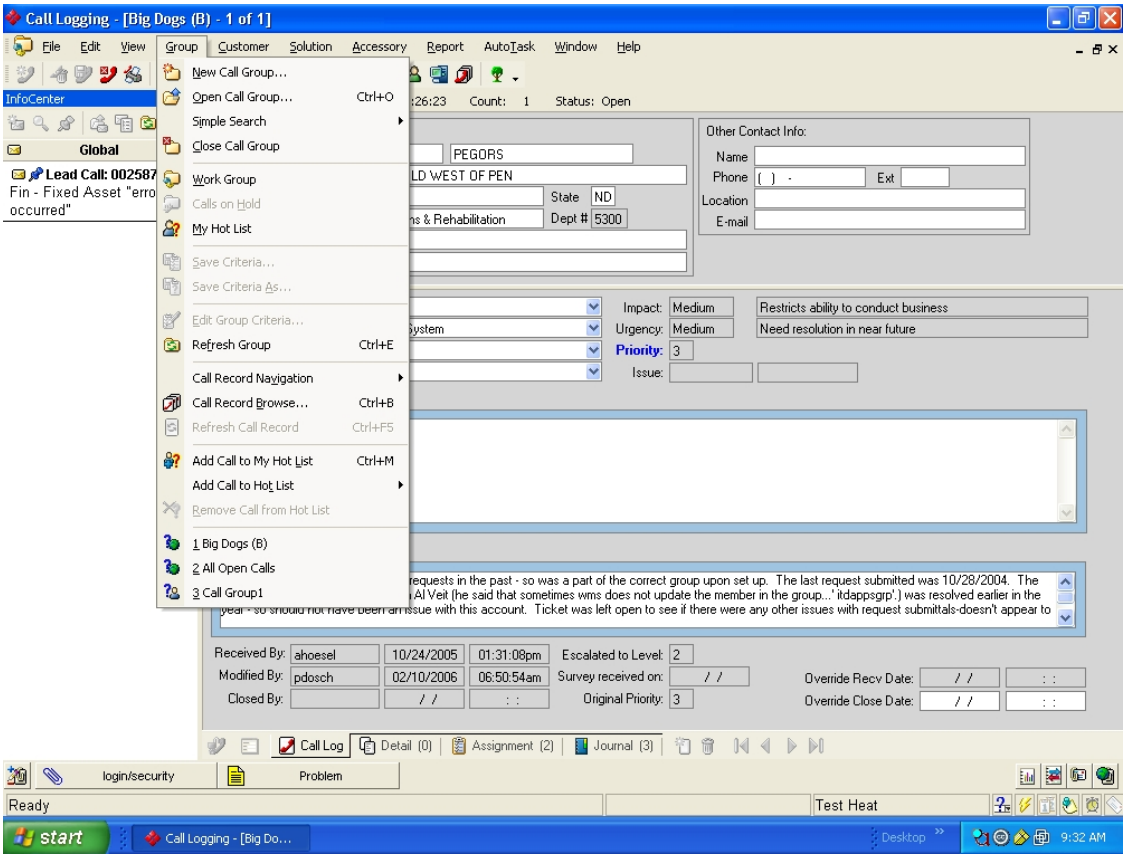
To refresh the HeatBoard issue list
Click on the refresh icon on the InfoCenter taskbar



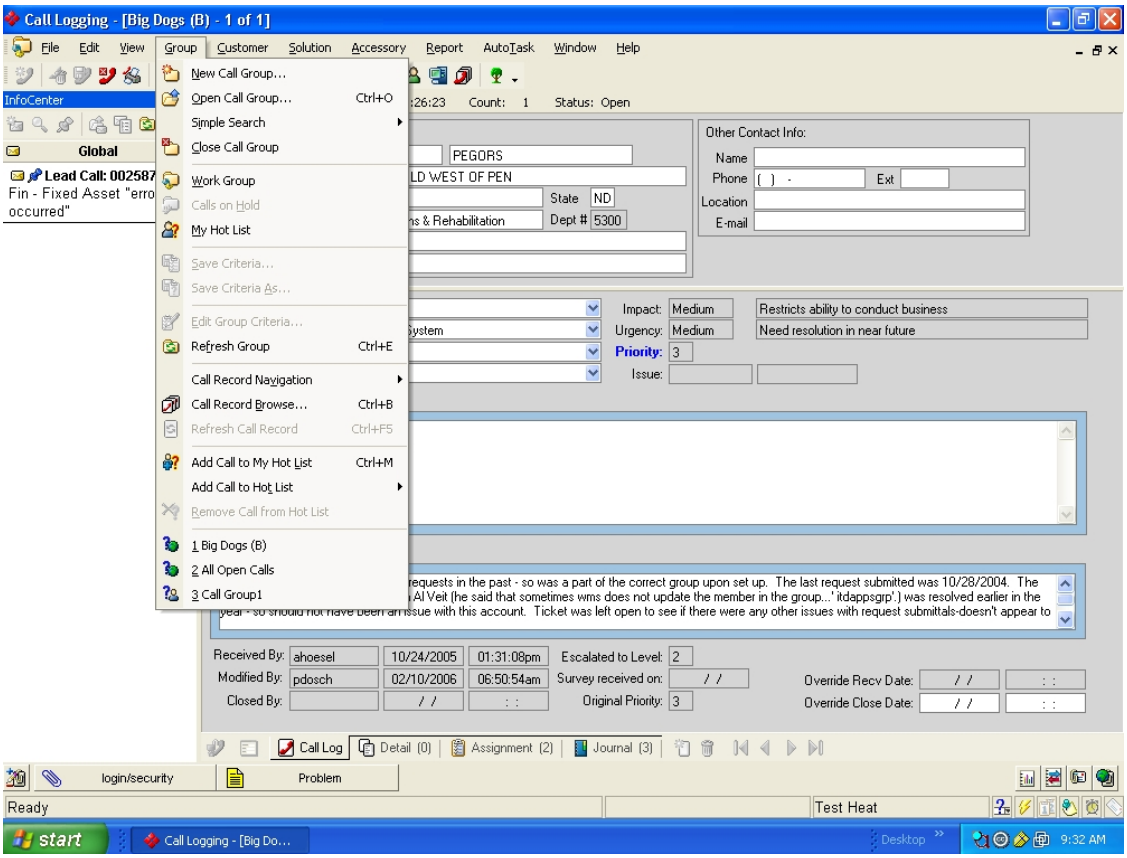
My Hot List usage

'My Hot List' is a tool to allow you to bookmark certain Heat tickets that you can call up at anytime. Adding & removing tickets from your Hot List does not effect the ticket in anyway.

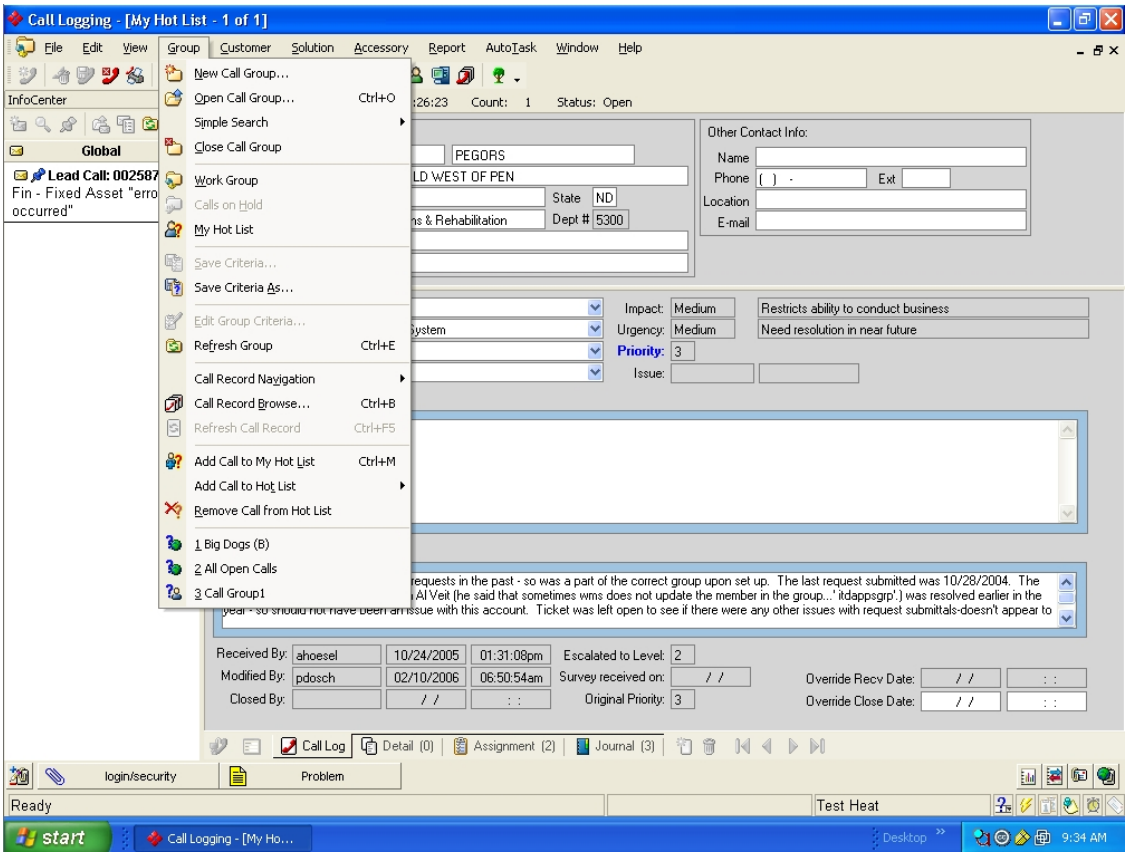
To add a ticket to your Hot List:
Go to the ticket you want to add.
Click on Group, from the menu bar.
Click on Add Call to My Hot List.
Click OK.



To view tickets in your Hot List:
Click on Group, from the menu bar.
Click on My Hot List.



To remove tickets from your Hot List:
Click on Group, from the menu bar.
Click on My Hot List.
Scroll thru the Group to find the ticket you no longer want in your list.
Click on Group, from the menu bar.
Click on Remove Call from Hot List.
Click on Ok



Tips & Tricks

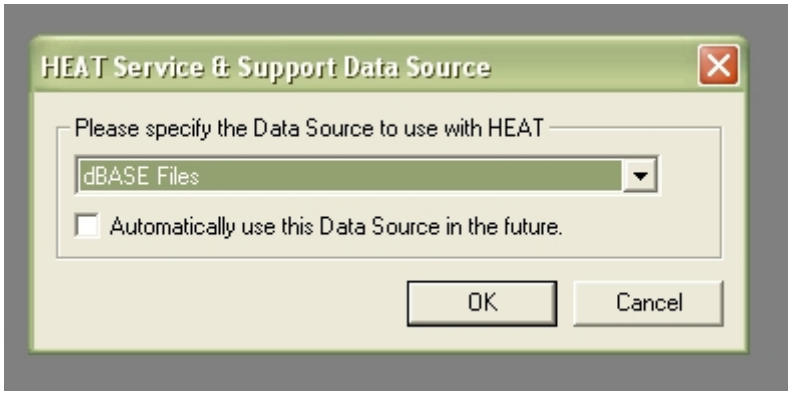
Adding a shortcut icon to your toolbar…
Click on Manage Auto Tasks
Click on Team
Select the Autotask you want to run
Click on the Associated toolbar button
Select the icon you want to use
Click ok (you should now see the icon in your toolbar)
Click close

Removing unwanted icons on your toolbar...
*You must open the customize window first to do any work with icons…
Click on the downarrow at the end of the toolbar
Click on customize
Now drag and drop icons from your toolbar to the customize window
*you can get icons back or add new ones by reversing this order
*you can change the position of the icons by dragging & dropping
When you are done Click close

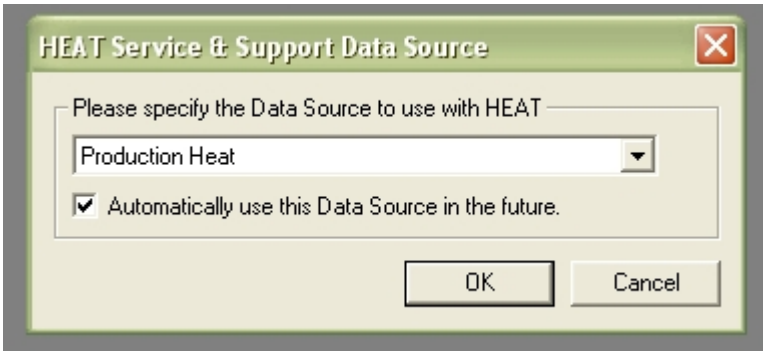
Adding a new toolbar
Click on the downarrow at the end of the toolbar
Click on customize
Click on toolbars
Click on new
Enter a name and click ok
Click and drag the toolbar to the top of the window
Click close

Changing the theme of Call Logging...
Click on the downarrow at the end of the toolbar
Click on customize
Click on the tab 'Themes'
Select the theme you want
Click apply
Click close

Problems Logging into Heat due to the DSN not selected or missing.
Two different issues can occur when you try to start Call Logging and you get the following screen.



First, click on the down arrow and select ‘Production Heat’. If it is found, then checkmark ‘Automatically use this Data Source in the future’ and then click OK.



You should now be in Call Logging, and this window will not appear again.

**

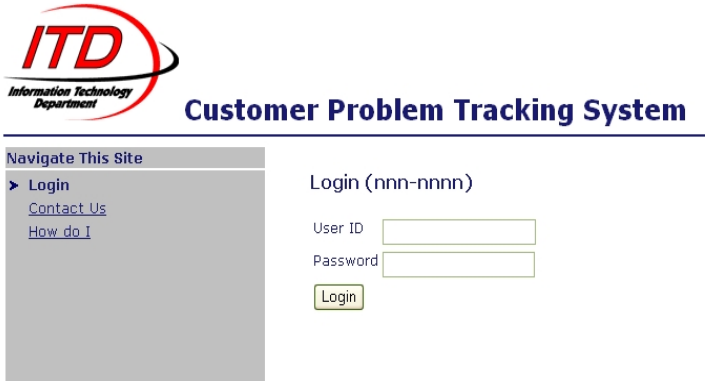
If ‘Production Heat’ is not found then you need to create a system DSN. This is done by doing the following:

Click on Start
Click on Programs
Click on Administrative Tools
Click on Data Sources (ODBC)

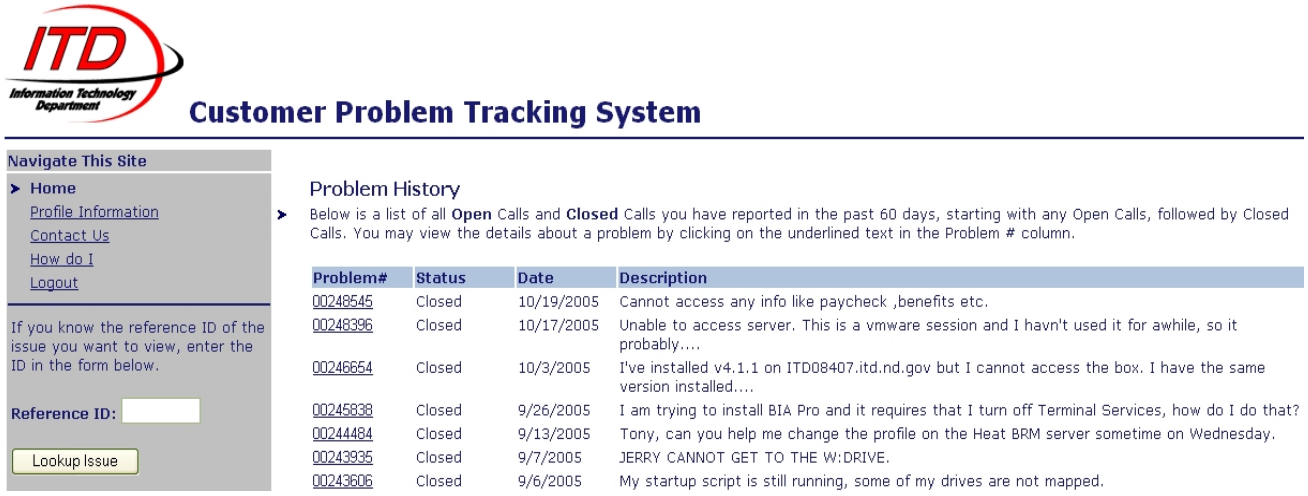
Select the ‘System DSN’ tab
Click on Add
Scroll down and select ‘SQL Server’
Click finish
Enter ‘Production Heat’ in the name field.
Enter ‘itdsqlpg1’ in the Server field.
Click next
Click next
Place a checkmark in ‘Change the default database to’
Make sure that the field below this shows ‘HEAT’
Click next
Click finish
Click ‘test datasource’
It should show ‘successful’, if not then you need to contact the Service Desk
Click ok
Click ok
Click ok
Repeat the process to start Call Logging, selecting Production Heat and placing a checkmark in ‘use this datasource…’.
If you still cannot get in then contact the Service Desk

Heat Self Service

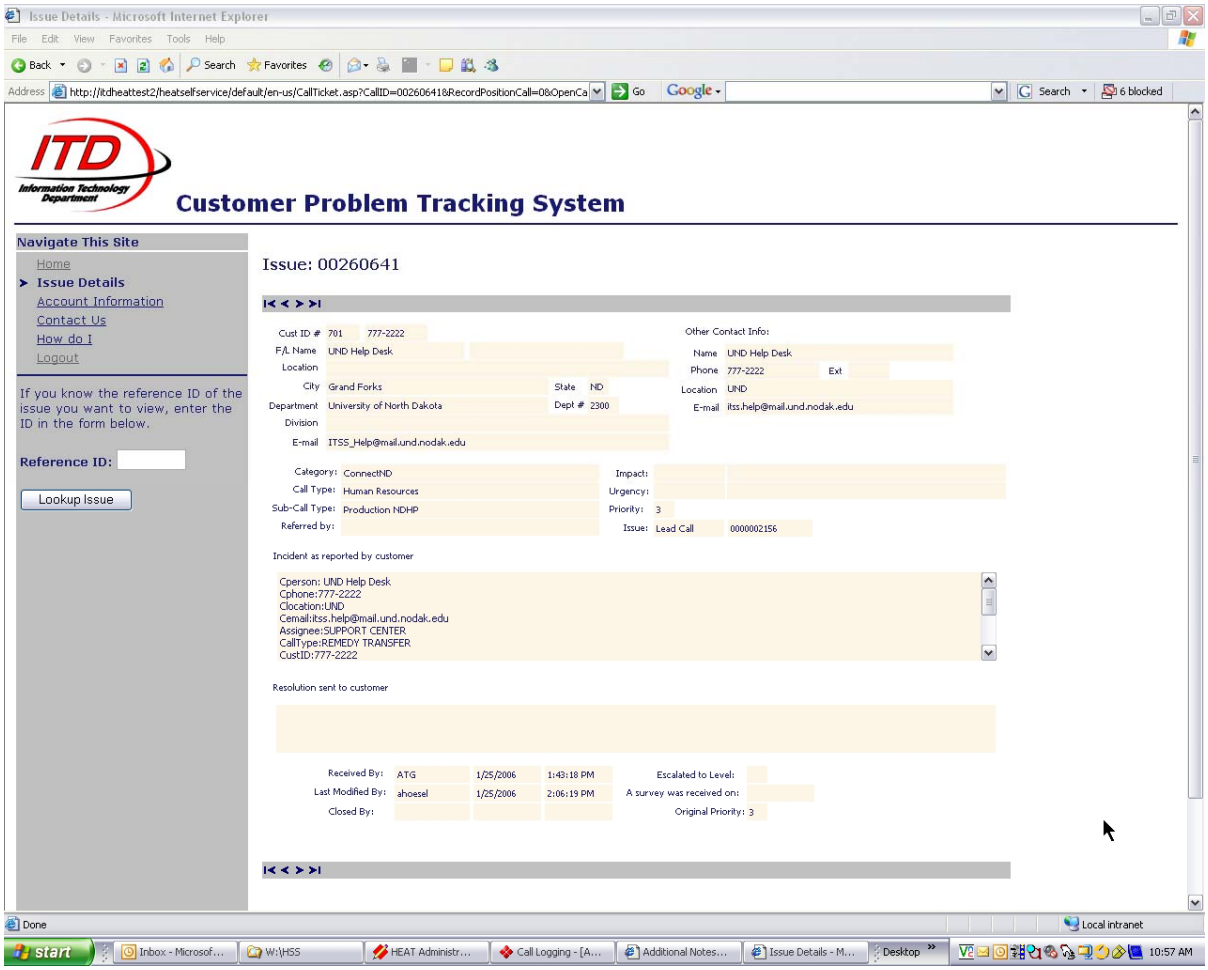
The Customer Problem Tracking System allows you to view tickets that you have created and are still open or they have been closed in the last 60 days.
To use this system you need to know the password assigned to you, please ask your IT coordinator for assistance.
Click on this url to go to the HSS login page http://itdheat/heatselfservice/default/en-us



Enter your User ID, which is your phone number in the format 555-1212
Enter the password supplied by your IT coordinator
Click Login



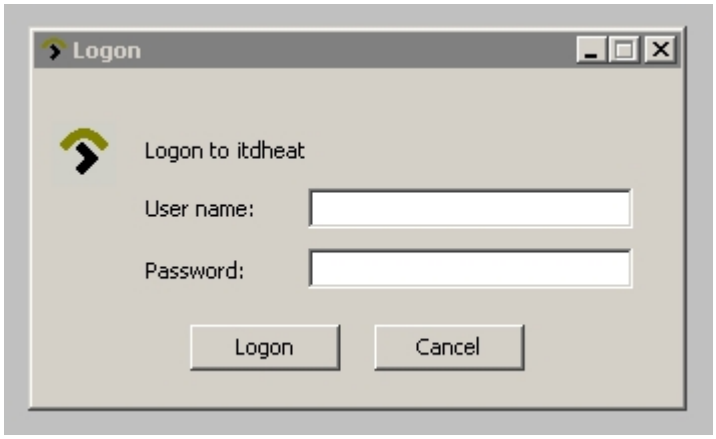
If any tickets for you are Open or Closed in the last 60 days you will now see a link to each of those.
Click on the problem# to access each of the tickets. When you are done click on Logout to exit the system.
You can also see the information that we have on file for you by clicking on Profile Information.
The Problem# and Reference ID: are the same field.



This page contains all the main information stored for this ticket, i.e. Customer data, Other contact data if available, Categorization of the incident, status, description of the incident, resolution of the incident. Clicking on Additional Notes will show you any notes with this incident, but due to sensitivity issues the actual text of that note will not be displayed.

iHeat Web Client

This web based client allows you access to Heat Call Logging but at the cost of speed. If you have the full client installed on your pc or the iHeat thin client those would be the preferred method of use. But if you are away from your desk and are behind the ND State firewall you can access your tickets via this tool.
Since this is a web based system, unified login will not work so you will be required to login twice, once to the database, the second time into the product. Please note the difference in passwords…
Click on the link http://itdheat/iheat/javalogonsigned.html



Enter your NDGOV userid & password then click 'Logon'.

Enter your NDGOV userid & the password 'heat' in lower case. Then click 'OK'
Access at this point is no different than if you were running the full client, just remember that this process is very slow and should be used only when needed.

When exiting the web client please click on File and Exit for iHeat first before closing the browser window.