



Helpdesk Information



January 9, 2009
Client Version

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LOGGING IN TO HELPDESK

The address of our Helpdesk is:

<http://helpdesk.opendoor.ca/Login.asp>

Your User ID and password will be assigned and emailed to you. Please change your password after you login for the first time.

You do this by clicking on *Change Password* from the main menu.

If you have forgotten your password, click on *Forgot your password?* and your password will be reset and emailed to you.

If you have any difficulties logging in, please send an email to Support at support@opendoor.ca.



The screenshot shows the login interface for the Open Door Technology Inc. Helpdesk. At the top, there are three logos: 'opendoor TECHNOLOGY' (green and blue), 'Open Door Technology Inc' (blue), and 'IssueTrak' (blue). Below the logos is a blue header bar with the text 'Please Sign In'. The main content area is white and contains the following text: 'Helpdesk support is available M-F 8AM to 5PM MST.' followed by 'Login to Helpdesk to research past support issues, submit new ones and monitor solution progress of current issues.' Below this text are two input fields: 'User ID:' with the text 'odtuser' and 'Password:'. A green 'Sign In' button is positioned below the password field. At the bottom of the form, there is a link that says 'Forgot your password?'. A small question mark icon is visible in the top right corner of the main content area.

My SETTINGS

After logging in and changing your password, please update your user profile. Simply click on *My Settings* to open the following window:

opendoor TECHNOLOGY

Open Door Technology Inc

IssueTrak

Main Menu My Settings for Jane Doe

printer friendly ?

Home

My Open Door Technology's Helpdesk

My Issues

My Settings

Change Password

Submit an Issue

Search Issues

Lookup Issue #

ODT Knowledge Base

GoToAssist

Log Out

* Your TimeZone: Time Zone

(GMT-07:00) Mountain Time (US & Canada)

☒ Adjust dates/times during Daylight Saving Time

Default Home Page: Preferences

My Issues

Personal Info

Phone:

Email:

Pager Email:

Address:

City/State/Zip:

Country:

Update Reset

* Required

Please verify your email address and phone number and make any corrections, if necessary. Be sure to include your direct line and additional information as necessary.

If you would like a cell number added to your user settings, send an email to support@opendoor.ca and we can add this number (this field is not visible to general users).

My ISSUES

The first window you see when you log in is My Issues.

opendoor TECHNOLOGY Open Door Technology Inc IssueTrak

Main Menu Home - Issues for Jane Doe

printer friendly ?

Welcome to the Open Door Technology Helpdesk

Remember to change the Substatus on your issues when Adding Notes!

Show Open Issues

- As Submitter (1)

My Reports [Show Shared Reports](#)

My Reports (5)

(5) Saved Search * Shared

[Run Report](#) [Edit Report](#) [Delete Report](#)

Click on *As Submitter* to open your list of issues.

opendoor TECHNOLOGY Open Door Technology Inc IssueTrak

Main Menu Home - Issues for Jane Doe

printer friendly ?

Welcome to the Open Door Technology Helpdesk

Remember to change the Substatus on your issues when Adding Notes!


Newest Issues First ▼

| Issue # | Subject | Priority | Opened | Assigned To | Last Activity | SubStatus |
|---------|--|----------|-------------|-------------|---------------|-----------|
| 5593 | Navigation pane - missing a report | 3-Medium | 09-Jan-2009 | Kelly Smith | 09-Jan-2009 | Medium |

Symbol Legend

- E** Escalated Issue
- Issue has Attachments
- Issue is half-way Out of Compliance
- Issue SLA is Out of Compliance

You can then click on one of these issues to open it.

| Main Menu | | View Issue #5593 | |
|--|---|--|--|
| | | printer friendly email issue  | |
| Home My Open Door Technology's Helpdesk Issue Detail View Add Note Attachments Clone/Copy Submit an Issue Search Issues Lookup Issue # ODT Knowledge Base GoToAssist Log Out | Add Note | | |
| | Issue #: 5593 | | |
| | SLA in Effect: NONE | | |
| | Issue Status: Open - Medium history | | |
| | Subject: Navigation pane - missing a report | | |
| | Issue Type: Navigation Pane | | |
| | Priority: 3-Medium | | |
| | Severity: | | |
| | Organization: Open Door history | | |
| | Company Name in Navision: | | |
| | Area: Reports | | |
| | PO Number: | | |
| | Database: Navision Database Server | | |
| | Executable Version: MBS-Navision 4.0 SP3 | | |
| | Organization Type: Education | | |
| Submitted By: Jane Doe on 09-Jan-2009 10:06AM history | | | |
| Assigned To: Kelly Smith on 09-Jan-2009 10:07AM 877.777.0396 x206 details | | | |
| Next Action: Kelly Smith on 09-Jan-2009 10:07AM 877.777.0396 x206 details | | | |
| Email Notification: View/Maintain Distribution List... | | | |
| Target Date: | | | |
| Required By Date: | | | |
| Total Time Open: 00:04 | | | |
| Adj Time Open: 00:04 | | | |
| Labor Hrs: 00:00 | | | |
| Cause: | | | |
| Description: <div>I cannot find the Payroll G/L Distribution report under Reports. Where is it?</div> | | | |
| Add Note | | | |

SUBMITTING ISSUES

Submitting an issue to the Helpdesk alerts the support staff that you have an issue that needs to be addressed.

To submit an issue, click on *Submit an Issue*, to open the following window:

The screenshot shows the 'Submit An Issue' web interface. It features a blue header bar with 'Main Menu' and 'Submit An Issue'. A left sidebar contains a 'Main Menu' with links: Home, My Open Door, Technology's Helpdesk, Submit an Issue (highlighted), Search Issues, Lookup Issue #, ODT Knowledge Base, GoToAssist, and Log Out. The main content area has a 'Submit Issue' button at the top. Below it is a large text area for the 'Full Description' with a rich text editor toolbar. Further down are dropdown menus for 'Issue Type', 'Issue Status' (set to 'Open'), and 'Organization Type'. At the bottom are input fields for 'Company Name in Navision', 'Area', 'PO Number', 'Database', 'Executable Version', and 'Organization'.

- Type in the Subject.
- Type a detailed description of the issue or copy the issue from the email. The text automatically 'word wraps', there is no need to hit 'ENTER' at the end of each line. Note: there is character and space limit of 7000.
- Select the Issue Type.
- Select the Issue Status.
- Type in the Company Name if you have multiple companies within your organization.
- Select the Area.
- Enter the PO Number, if your organization requires a PO for Helpdesk Issues.
- Select the Database.
- Select the Executable Version.
- Select the Organization Type.

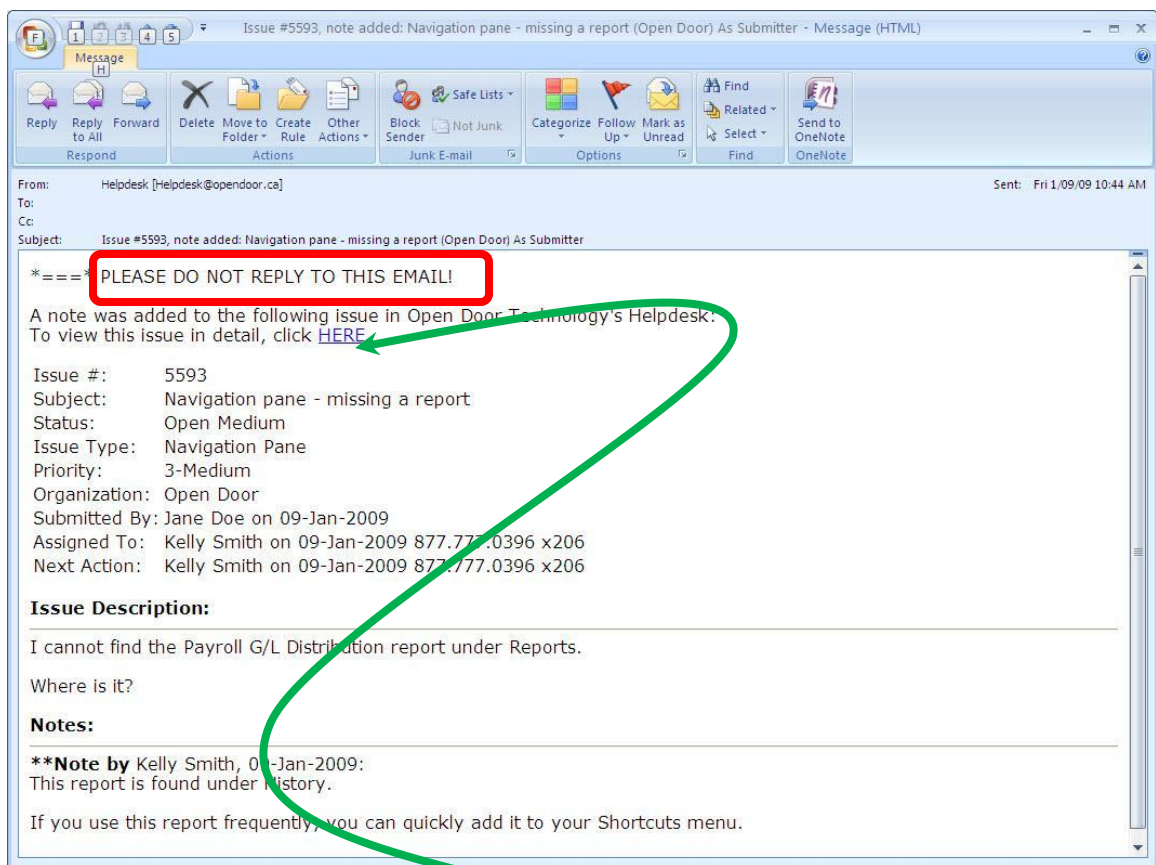
- [illegible]

HELPDESK EMAILS

Whenever you receive a system-generated email from the Helpdesk, you will notice that it says, "PLEASE DO NOT REPLY TO THIS EMAIL!"

These emails are automatically sent whenever:

- You submit an issue
- An issue is submitted on your behalf (by Open Door Technology staff)
- Notes have been added
- The issue has been closed



To respond to these emails, click on the link to open the Helpdesk website and add your comments to the issue there.

UPDATING ISSUES

Issues are updated by the *Add Note* function. When you need to respond to a question from support or add more details to an issue, click Add Note. This provides both the client and ODT support staff a history of the issue and the steps taken to resolve it.

After clicking Add Note, the following screen appears:

Input the details in the Note window. You can cut & paste or type directly into this field. The text automatically 'word wraps', there is no need to hit 'ENTER' at the end of each line. You are limited to 7000 character in this field (the 7000 is a limit on characters, spaces, and formatting).

Do not forget to update the Issue Status! This alerts the Open Door staff that an issue is awaiting their response.

After you have entered all details and completed the editing of the issue, click Add Note.

ATTACHING FILES

From the View window, you can click on the *Attachments* menu choice to open the Attachments window. Simply browse to the file location and click the Save Selected Attachments button. You can attach up to three files at a time. If you need to attach more than three, click the Attachments option again. The Reset button removes the files you are about to attach, not the ones already attached to the issue.

An important thing to note, click the Attachments option *after* you have saved any notes you have entered into the issue. If you click Attachments before the notes are saved, you will lose everything you just typed.

Main Menu **View Issue #5593** printer friendly | email issue

Home
My Open Door
Technology's Helpdesk

Issue Detail
View
Attachments
Clone/Copy
Submit an Issue
Search Issues
Lookup Issue #
ODT Knowledge Base
GoToAssist
Log Out

Add Note

Issue #: 5593
SLA in Effect: **NONE**
Issue Status: Open - Medium history
Subject: Navigation pane - missing a report
Issue Type: Navigation Pane
Priority: 3-Medium
Severity:
Organization: [Open Door](#) history
Company Name in Navision:
Area: Reports
PO Number:
Database: Navision Database Server
Executable
Version: MBS-Navision 4.0 SP3
Organization Type: Corporate
Submitted By: [Jane Doe](#) on 09-Jan-2009 10:06AM history
Assigned To: [Kelly Smith](#) on 09-Jan-2009 10:07AM 877.777.0396 x206 details
Next Action: [Kelly Smith](#) on 09-Jan-2009 10:07AM 877.777.0396 x206 details
Email Notification: [View/Maintain Distribution List...](#)

Main Menu **Attachments for Issue #4615** printer friendly

Home
My Open Door
Technology's Helpdesk

Issue Detail
View
Add Note
Attachments
Clone/Copy
Submit an Issue
Search Issues
Lookup Issue #
ODT Knowledge Base
Log Out

To add attachments, first select files and then press Save.

Issue #: 4615
Description: Navigation Pane problem

Add Attachments

Filenames:

ISSUE LOOKUP

You can quickly lookup an issue if you know the issue number by clicking *Lookup Issue #*. The following window appears:

The screenshot shows the 'Issue Lookup' page of the Open Door Technology Inc. IssueTrak system. At the top, there are three logos: 'opendoor TECHNOLOGY' (green and blue), 'Open Door Technology Inc' (blue), and 'IssueTrak' (blue with a swoosh). Below the logos is a dark blue navigation bar with 'Main Menu' and 'Issue Lookup' tabs. On the left side, under the 'Main Menu' tab, there is a list of links: 'Home', 'My Open Door Technology's Helpdesk', 'Submit an Issue', 'Search Issues', 'Lookup Issue #', 'ODT Knowledge Base', 'GoToAssist', and 'Log Out'. The 'Lookup Issue #' link is highlighted. The main content area has a header 'Issue Lookup' and a sub-header 'Issue Number:'. Below this is a text input field and a green 'Lookup Issue' button. In the top right corner of the main content area, there are links for 'printer friendly' and a help icon.

Type in the issue number and hit Enter on your keyboard or click the Lookup Issue button.

SEARCHING ISSUES

The Search Issues window allows you to search for issues within multiple fields and parameters.

The screenshot shows the 'Search Issues' window. On the left is a 'Main Menu' sidebar with links: Home, My Open Door, Technology's Helpdesk, Submit an Issue, **Search Issues**, Lookup Issue #, ODT Knowledge Base, GoToAssist, and Log Out. The main area has a blue header with 'Search Issues' and a 'printer friendly' link. Below the header are 'Search' and 'Reset' buttons. The 'Search Criteria' section includes: 'Issue Status' and 'Priority' (both dropdown menus), 'Issue Type' (dropdown menu) with a 'Show Inactive Types' checkbox, 'Search All' (text input) with a 'Keyword Search.' label, 'or', 'Subject' (text input) with a 'Keyword Search.' label, 'Notes' (text input) with a 'Keyword Search.' label, 'Solution' (text input) with a 'Keyword Search.' label, 'Company Name in Navision' (text input) with an asterisk, 'Area' (dropdown menu), 'PO Number' (text input) with an asterisk, 'Database' (dropdown menu), 'Executable' (dropdown menu), 'Version' (dropdown menu), and 'Organization Type' (dropdown menu). A note at the bottom right states: '* wildcard searches allowed (ex: "ab*")'.

When searching by the text fields – 'Search All' or 'Solution' for example – you can perform multi-word searches by putting a semi-colon between words: How; create; article.

In the Search Function 'Issue Status' field is defined in the following way:

Blank: All issues OPEN or CLOSED will appear in search results

Open: Only issues currently OPEN will appear in search results

Closed: Only issues CLOSED to date will appear in search results

Also, you do not need to fill in the Organization field in the search criteria. As all search results are limited to your organization.

Submitted By: [hints](#)
Entered By: [hints](#)
Assigned To: [hints](#) ☐ Ever Assigned To
Assigned By: [hints](#)
Next Action: [hints](#)
Closed By: [hints](#)
Organization: [Issues:](#)
Cause:

Target Date: Start: End: dd-mmm-yyyy
Date Opened: Start: End: dd-mmm-yyyy
Date Closed: Start: End: dd-mmm-yyyy
Required By Date: Start: End: dd-mmm-yyyy

Total Time Open: days ☐ less than ☒ more than ☐ equal
Adj Time Open: days ☐ less than ☒ more than ☐ equal
Labor Hours: hours ☐ less than ☒ more than ☐ equal

Search Output Options
Search Title: My Report
Output: Brief List ☒ Include Criteria in Results
Sort Order 1: Asc
Sort Order 2: Asc
Sort Order 3: Asc

[Save New Search](#)
[Retrieve Saved Searches](#)

You do not need to fill in the Organization field in the search criteria. As all search results are limited to your organization.

You can limit your searches to particular dates and date ranges. And there are sorting options available, based on the search criteria you have chosen.

If you find yourself performing the same search over and over, you can save the search by clicking Save New Search. A list of your saved reports appears on the My Issues page.

opendoor **Open Door Technology Inc** **IssueTrak**

Main Menu **Home - Issues for Jane Doe** [printer friendly](#) [?](#)

Home
My Open Door Technology's Helpdesk
My Issues
My Settings
Change Password
Submit an Issue
Search Issues
Lookup Issue #
ODT Knowledge Base
GoToAssist
Log Out

Welcome to the Open Door Technology Helpdesk
Remember to change the Substatus on your issues when Adding Notes!

Show Open Issues
• As Submitter (1)

My Reports [Show Shared Reports](#)
My Reports (5)

(5) Saved Search * Shared

ODT KNOWLEDGE BASE

Open Door Technology provides the opportunity for our clients to bypass the support staff and resolve issues on their own. Our Knowledge Base provides answers to commonly asked questions and recurring issues.

Navigating through the Knowledge Base is quite simple. Clicking on ODT Knowledge Base opens the following window:

Main Menu
[Home](#)
[My Open Door Technology's Helpdesk](#)
[Submit an Issue](#)
[Search Issues](#)
[Lookup Issue #](#)
ODT Knowledge Base
Quick Search
[List All](#)
[Search](#)
[GoToAssist](#)
[Log Out](#)

List by Category

Article Nbr:

Quick Search:

printer friendly

| Category | Sub Category |
|---|--|
| Accounts Payable (25) | Advanced Cheque (3) |
| | Invoice (4) |
| | Payments (11) |
| | Purchase Order (1) |
| | Reporting (2) |
| | Setup (1) |
| | Vendors (3) |
| Accounts Receivable (8) | Customers (4) |
| | Hotfix (1) |
| | Invoice (0) |
| | Setup (3) |
| Fixed Assets (3) | |
| General Ledger (21) | Account Schedules (3) |
| | Bank Accounts (2) |
| | Bank Reconciliation (1) |
| | Consolidation (1) |
| | Journal Entry (4) |
| | Multicurrency (3) |
| | Recurring Journal (2) |
| | Setup (3) |
| | Year End Procedures (2) |
| Helpdesk (2) | |
| Human Resources (0) | |
| Installation (16) | Jet Reports (3) |
| | License (3) |
| | Navision (4) |
| | Navision Objects (1) |
| | Service Packs (1) |
| | SQL (2) |
| | Test Company (2) |
| Inventory (9) | |
| Jobs (2) | |
| Microsoft (1) | CustomerSource (1) |
| | PartnerSource (0) |
| | Windows (0) |
| ODT Add-Ons (0) | |
| ODT Internal Setup (1) | Data Migration (1) |
| ODT-Upgrades (0) | |
| Payroll (20) | Cheques/Direct Deposit (1) |
| | Dataport (2) |

If you know the Article number, you can go directly to it by entering the number in the Article Nbr field or you can do a Quick Search by entering some keywords at the top, or click on a Category or Sub Category to view the associated articles.

You can also perform a more detailed search, by clicking on *Search* in the menu:

opendoor TECHNOLOGY **Open Door Technology Inc** **IssueTrak**

Main Menu **Search ODT Knowledge Base** printer friendly ?

Home
My Open Door Technology's Helpdesk
Submit an Issue
Search Issues
Lookup Issue #
ODT Knowledge Base
Quick Search
List All
Search
GoToAssist
Log Out

Search All:
or
Title:
Article Text:
Tags:
Article Nbr:
Organization:
Category:
Sub Category:
Date Created: Start: End: dd-mmm-yyyy
Output: Brief List
Sort Order 1: Ascending
Sort Order 2: Ascending

Or you can click on *List All* to scroll through the entire list of Knowledge Base articles.

All Articles:

[Back](#)

Sort columns by clicking headings

| Article # | Title | Organization | Category | Sub Category |
|-----------|---|-----------------|------------------|--------------|
| 3 | Cancel a Purchase Order | 1-Non-resellers | Accounts Payable | Pu |
| 4 | How to delete and create new .zip file | 1-Non-resellers | System | Lic |
| 5 | Message - Doesn't have permission for a module | 1-Non-resellers | System | Se |
| 6 | Installing a License File at Client's Installation | 1-Non-resellers | System | Lic |
| 7 | Loading a New License | 1-Non-resellers | System | Lic |
| 23 | Closing Fiscal Year End Procedures | 1-Non-resellers | General Ledger | Ye |
| 26 | Generating Pay Cycle Periods | 1-Non-resellers | Payroll | Pa |
| 30 | Navision SQL Server Option Installation Checklist | 1-Non-resellers | Installation | SQ |
| 32 | Adding an extended stored procedure for Navision SQL Windows Authentication | 1-Non-resellers | SQL Server | |
| 33 | Import Payroll Control Data Error | 1-Non-resellers | Payroll | Pa |
| 34 | 2006 January Tax Updates | 1-Non-resellers | Payroll | Ta |

GoToAssist – *NEW FEATURE!!*

You will now notice a new menu option – GoToAssist. This feature provides the Support staff with a remote connection directly to your desktop which will give you with a more effective communication tool.



How It Works:

- Step 1:** Once you are on the phone with a member of our support team, you will be provided with a unique connection code. You will then enter the code and click the Click Here button to initiate the screen-sharing session.
- Step 2:** You are prompted to download a small virus-free plug-in.
- Step 3:** With your permission, your support representative can view your screen and share control of your mouse and keyboard.
- Step 4:** You are in full control of your computer at all times. You always have overriding control of your mouse and keyboard, and you can end the screen-sharing session at any time.

Clicking on the GoToAssist menu option opens this window:

