



# Helpdesk Information



January 9, 2009  
Client Version

# TABLE OF CONTENTS

Logging in to Helpdesk.....	1
My Settings .....	2
My Issues .....	3
Submitting Issues.....	5
Helpdesk Emails .....	7
Updating Issues.....	8
Attaching Files.....	9
Issue Lookup .....	10
Searching Issues .....	11
GoToAssist – <i>New Feature!!</i> .....	13

# 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](mailto: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 Helpdesk' (blue text), and 'IssueTrak' (blue and green). 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 value 'odtclient' 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 #

GoToAssist

Log Out

\* Your TimeZone: (GMT-07:00) Mountain Time (US & Canada)

☒ Adjust dates/times during Daylight Saving Time

Preferences

Default Home Page: My Issues

Personal Info

Phone:

Email: ksmith@opendoor.ca

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](mailto: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 (S)

(S) 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 ?	
<div>Home</div> <div>My Open Door Technology's Helpdesk</div> <div><b>Issue Detail</b></div> <div><b>View</b></div> <div>Add Note</div> <div>Attachments</div> <div>Clone/Copy</div> <div>Submit an Issue</div> <div>Search Issues</div> <div>Lookup Issue #</div> <div>GoToAssist</div> <div>Log Out</div>	<div>Add Note</div>		
	Issue #: 5593		
	SLA in Effect: <b>NONE</b>		
	Issue Status: Open - Medium    history		
	Subject: Navigation pane - missing a report		
	Issue Type: Navigation Pane		
	Priority: 3-Medium		
	Severity:		
	Organization: <a href="#">Open Door</a> 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: <a href="#">Jane Doe</a> on 09-Jan-2009 10:06AM    history			
Assigned To: <a href="#">Kelly Smith</a> on 09-Jan-2009 10:07AM    877.777.0396 x206    details			
Next Action: <a href="#">Kelly Smith</a> on 09-Jan-2009 10:07AM    877.777.0396 x206    details			
Email Notification: <a href="#">View/Maintain Distribution List...</a>			
Target Date:			
Required By Date:			
Total Time Open: 01:18			
Adj Time Open: 01:18			
Labor Hrs: 00:00			
Cause:			
Description: I cannot find the Detail Trial Balance report under Reports > Financial Statement.			
Where is it?			
Kelly Smith: This report is found under Reports > Entries.			
09-Jan-2009 11:21AM If you use this report frequently, you can quickly add it to your Shortcuts menu.			
<div>Add Note</div>			

# 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 a web application window titled "Submit An Issue". On the left is a "Main Menu" sidebar with links: Home, My Open Door Technology's Helpdesk, **Submit an Issue** (highlighted), Search Issues, Lookup Issue #, 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 several form fields: "Issue Type:" (dropdown), "Issue Status:" (dropdown with "Open" selected), "Company Name in Navision:" (text input), "\* Area:" (dropdown), "PO Number:" (text input), "\* Database:" (dropdown), "\* Executable Version:" (dropdown), and "\* Organization Type:" (dropdown). A "printer friendly" link and a help icon are in the top right corner.

- 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]

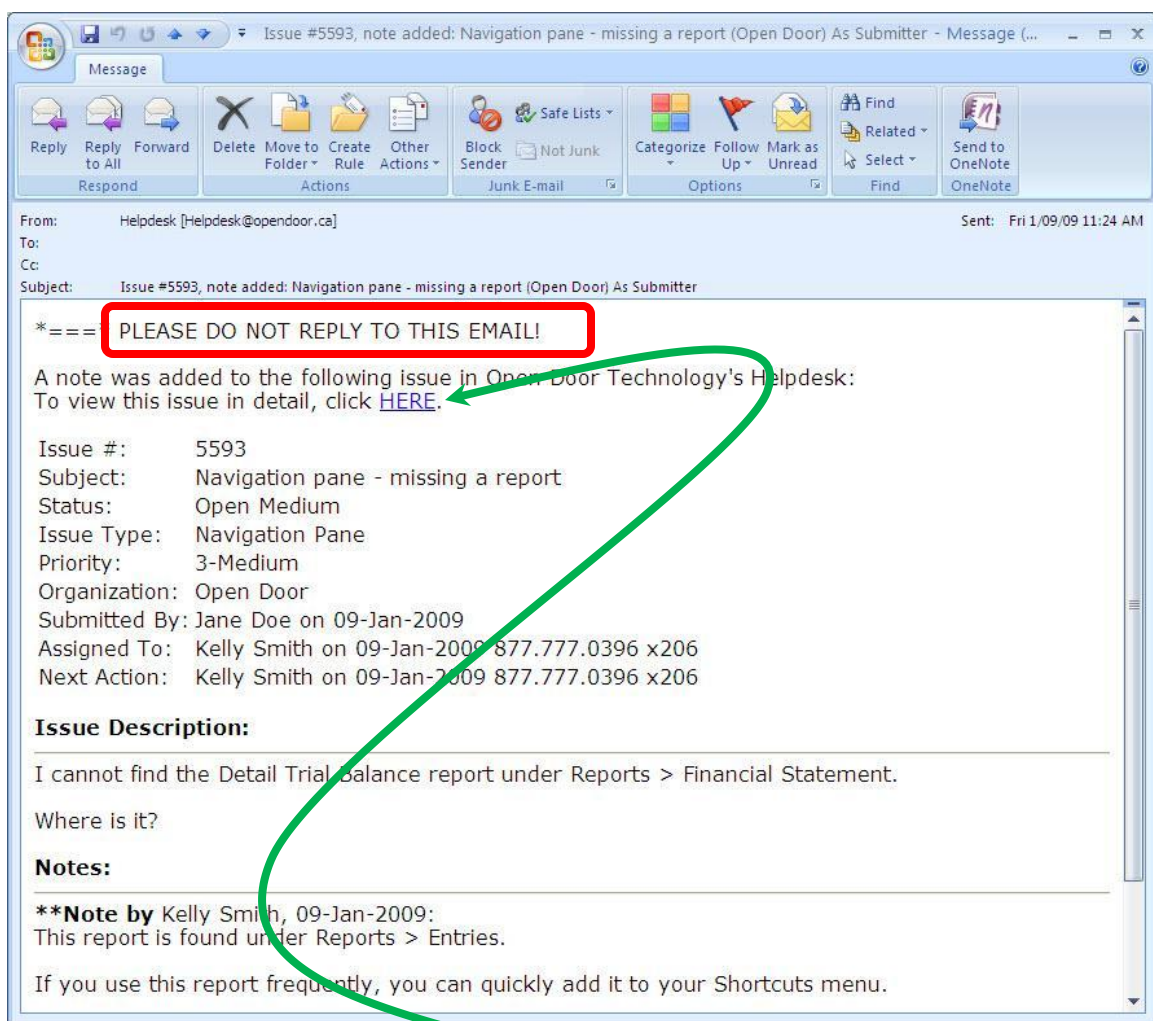


# HELPDESK EMAILS

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:

The screenshot displays the 'Add Note to Issue #5593' window. On the left is a 'Main Menu' with options: Home, My Open Door Technology's Helpdesk, Issue Detail (selected), View, Add Note (highlighted), Attachments, Clone/Copy, Submit an Issue, Search Issues, Lookup Issue #, GoToAssist, and Log Out. The main area on the right shows issue details for Issue #: 5593. Key fields include: SLA in Effect: NONE, Issue Status: Open (with a dropdown menu set to 'Ready to Close' and a 'history' link), Subject: Navigation pane - missing a report, Issue Type: Navigation Pane, Priority: 3-Medium, Organization: Open Door (with a 'history' link), Company Name in Navision: Area: Reports, PO Number, Database: Navision Database Server, Executable: MBS-Navision 4.0 SP3, Version, and Organization Type: Corporate. It also shows 'Submitted By: Jane Doe on 09-Jan-2009 10:06AM' with a 'history' link. Below this is a 'Note:' section with a rich text editor toolbar and a text area containing the text: 'Thank you for the instructions. I will add this report to my shortcuts.' The 'Add Note' button is located at the bottom left of the note editor area and is highlighted with a red box.

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**  
**Add Note**  
Attachments  
Clone/Copy  
Submit an Issue  
Search Issues  
Lookup Issue #  
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 #5593** printer friendly ?

Home  
My Open Door  
Technology's Helpdesk  
**Issue Detail**  
View  
Add Note  
**Attachments**  
Clone/Copy  
Submit an Issue  
Search Issues  
Lookup Issue #  
GoToAssist  
Log Out

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

Issue #: 5593  
Description: Navigation pane - missing a report

**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 blue navigation bar with 'Main Menu' and 'Issue Lookup' tabs. On the left side, there is a vertical menu with the following items: 'Home', 'My Open Door Technology's Helpdesk', 'Submit an Issue', 'Search Issues', 'Lookup Issue #' (which is highlighted), 'GoToAssist', and 'Log Out'. The main content area has a header 'Issue Lookup' and a sub-header 'printer friendly' with a help icon. Below this, there is a text input field labeled 'Issue Number:' and a green 'Lookup Issue' button.

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.

Open Door Technology Inc. IssueTrak

Main Menu Search Issues

Home  
My Open Door Technology's Helpdesk  
Submit an Issue  
**Search Issues**  
Lookup Issue #  
GoToAssist  
Log Out

Search Reset

printer friendly ?

**Search Criteria**

Issue Status: [dropdown] [dropdown]  
Priority: [dropdown]  
Issue Type: [dropdown] ☐ Show Inactive Types

Search All: [text] Keyword Search.  
or  
Subject: [text] Keyword Search.  
Notes: [text] Keyword Search.  
Solution: [text] Keyword Search.

Company Name in Navision: [text] \*  
Area: [dropdown]  
PO Number: [text] \*  
Database: [dropdown]  
Executable: [dropdown]  
Version: [dropdown]  
Organization Type: [dropdown]

\* 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 #  
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 (S)

(S) Saved Search \* Shared



# 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:

