



Windows
Help Desk Management



HELP DESK AUTHORITY 8.1

HDMobile User Guide

March 2009

SCRIPTLOGIC

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Chapter 1: Introduction

HDMobile is a venture of the *Scriptlogic Corporation* to move issue tracking from the personal computer to a mobile platform.



HDMobile is a powerful and innovative application specially designed for iPhone, which will allow you to carry out your issue-tracking operations on the move. It is closely integrated with ScriptLogic's desktop issue-management software suite *Help Desk Authority*.

The application provides a user-friendly and easy to use interface which allows you to view assigned issues, add new issues, resolve outstanding issues and update existing issues anywhere, anytime right from your iPhone.

The issues added through the iPhone are updated in real-time to the *Help Desk Authority* database. Thus a real-time connectivity over the Internet to the remote *HDAuthority* database is required.

HDMobile is a highly secure application and requires valid login credentials in order to access data from the remote server. The login validations can be performed by using *Help Desk Authority* credentials.



Active Directory Login

The current version of *HDMobile* does not support access using Active Directory login credentials. This feature will be integrated in a future version of *HDMobile*.

1.1 About this Guide

This User's Guide provides both quick start and detailed instructions of *HDMobile* functionality. Each function or feature is described in detail and includes simple step-by-step instructions to guide you through the process of issue tracking and management on your iPhone.

The guide is organized to get you started using *HDMobile* quickly:

Chapter 1 – the Introduction you are reading now;

Chapter 2 – Getting Started explains the preliminary steps required to get you online quickly and painlessly;


Chapter 3 – Working with Issues explains how to Add, Modify, Resolve and Delete Help Desk Authority Issues with your iPhone;

Appendices A to D include details such as issue fields, activity and navigation details, how to create a *Help Desk Authority* query and potential login issues.

This document assumes that *HDMobile* users are familiar with basic *HDAuthority* and *iPhone* functionality and navigation. We also assume you have *HDMobile* installed in your iPhone.

1.2 Demo

ScriptLogic has prepared a demonstration database to allow you to test the *HDMobile* application. After you have obtained and installed *HDMobile* from the app store touch the *HDMobile* icon to open the application to the login screen.

1. **Touch the Logon Name field** to display the keyboard.
2. **Enter one of the following logon names:**
 - Admin
 - MJones
 - JSmith
3. **Enter the password “evaluation”.**
4. **Touch the  button.**

The Issue List screen will display test issues from the demonstration database. Look at Chapter 3: Working with Issues for details on working with issues.

1.3 Contact ScriptLogic

For more information visit the ScriptLogic website at:

<http://www.scriptlogic.com>

E-Mail inquiries can be sent to:

Sales Information – sales@scriptlogic.com

Support Requests – hdasupport@scriptlogic.com

We can also be reached at:

ScriptLogic

310 Seven Fields Blvd

Seven Fields, PA 16046

Phone: 800-813-6415

Fax: 724-778-4982

Chapter 2: Getting Started

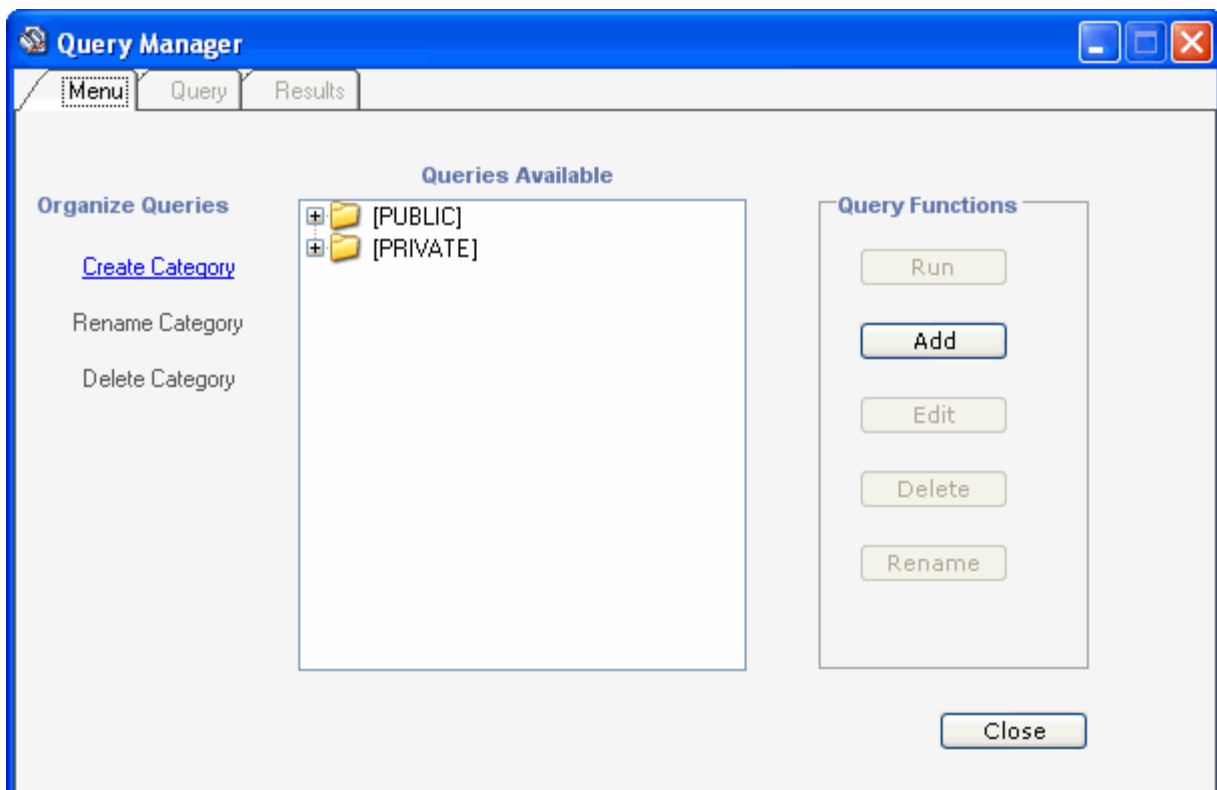
Getting started with *HDMobile* is a four step process:

- You first create an issue query in *Help Desk Authority* to select the issues you want to work with on your iPhone.
- Next you need to install the *HDMobile* web service on your *Help Desk Authority* database server.
- Finally, you need to enter the URL of the server that hosts the *HDMobile* web service into your *HDMobile* application.
- Login and manage your issues.

2.1 Create the HDMobile Issue Query

The web service which handles *HDMobile* requests uses a [PRIVATE] *Help Desk Authority* issue query named ***iPhoneIssues*** to retrieve the issues to be transferred to your iPhone.

In your *Help Desk Authority* application, open the **Tools** menu and select **Query Manager**. The Query Manager window will open as shown below.



To create the [PRIVATE] iPhoneIssues query:

1. **Select a [PRIVATE] category;**
2. **Click the Add button;**
3. **Create the iPhoneIssues query and test.** Detailed Instructions for creating and testing *Help Desk Authority* queries are in Appendix C.

Menu Query Results

Modifying Query "Untitled"
Date Created 11/22/2005
Last Modified 11/22/2005

Available fields for filtering...

- Asset
- Assigned Group
- Assigned User
- Build
- Category
- Company
- Company Size
- Contract
- Created Date
- Created User
- Customer
- Database Management
- Department

Condition

Condition(s) for filtering...

Edit
Delete
Not
And
Or
()

Save Save As Run Close



Limit your query results

If you have a very large list of issues in your *Help Desk Authority* database you will want to limit the number of issues you transfer to your iPhone.

2.2 Install the HDMobile Web Service

There are four steps you need to complete to Install the *HDMobile* Web Service:

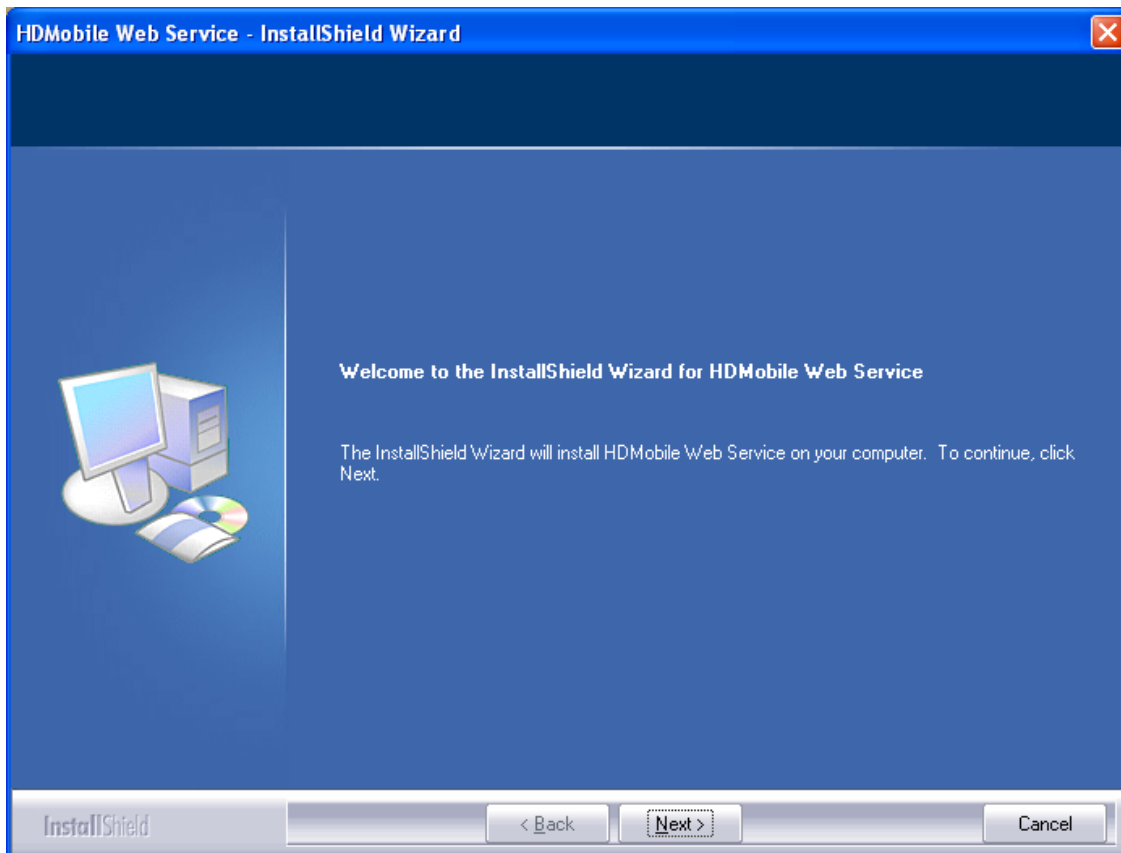
1. Download the HDMobile Web Service Setup file from ScriptLogic;
2. Run the HDMobile Web Service Setup file;
3. Run the *HDAuthority* Suite Database Configuration Editor;
4. Test the web service.

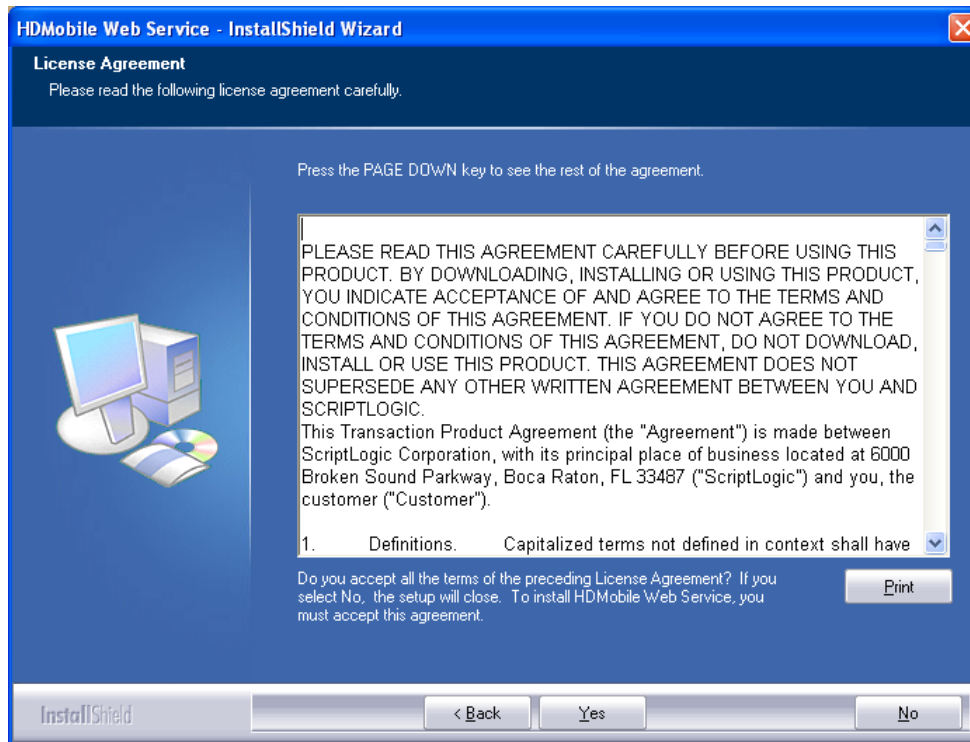
2.2.1 Download the HDMobile Web Service Setup file from ScriptLogic

You will need to login to the ScriptLogic web portal and download the *HDMobile* Web Service installer. This is the same process as when you logged in and downloaded your other *Help Desk Authority* products. If you need help with this step you can contact ScriptLogic as described in the Introduction (page 6).

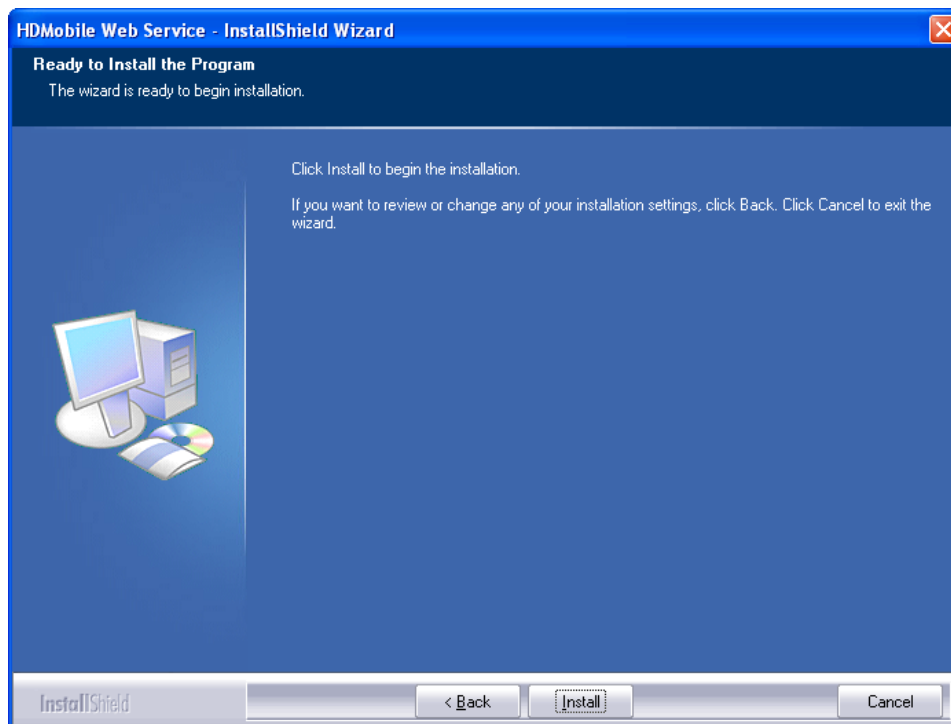
2.2.2 Run the HDMobile Web Service Setup file

When you start the *HDMobile* Web Service InstallShield Wizard you will see the welcome page first. Click the Next button to open the License Agreement window.

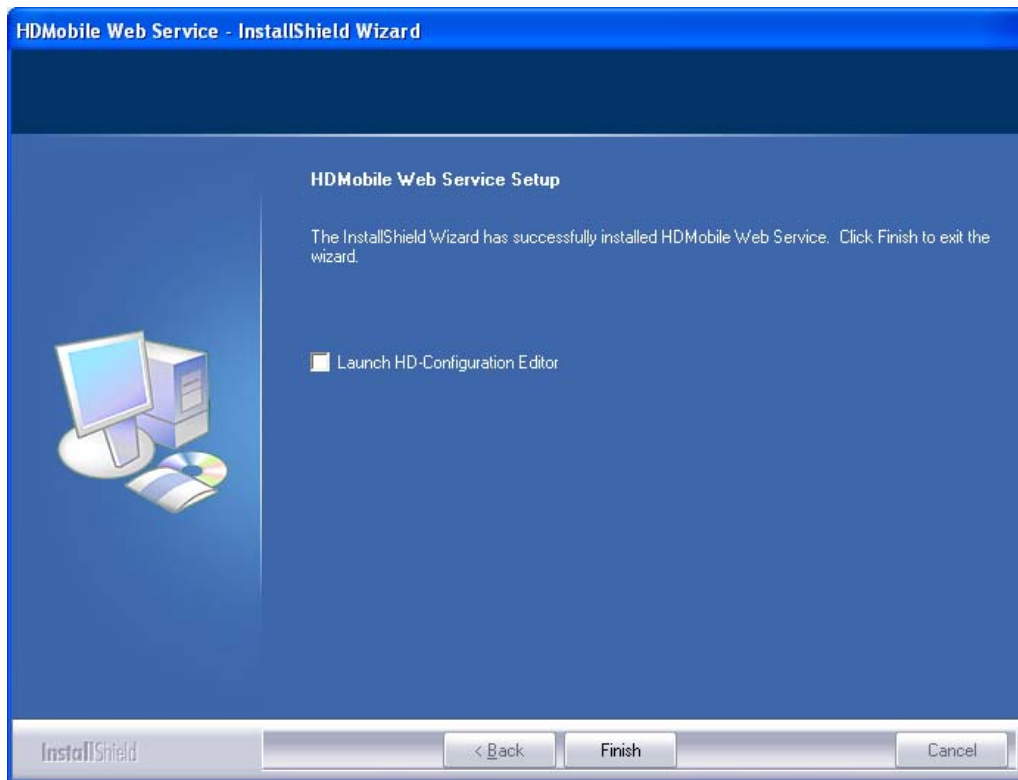




Read the license agreement and if you agree with the End User License Agreement click the **I accept the terms of the license agreement** radio button. You will not be able to continue the installation if you do not agree with the license agreement. Then click the Next button to open the **Ready to Install the Program** window. Click the **Install** button to begin the installation.



After the InstallShield Wizard successfully installs your *HDMobile Web Service* and displays the **HDMobile Web Service Setup** window, you are given the opportunity to launch the **HD Configuration Editor**. Since this is the next step in the installation process it is a good idea to check the **Launch HD Configuration Editor** checkbox and have the InstallShield Wizard open the configuration editor as it finishes.



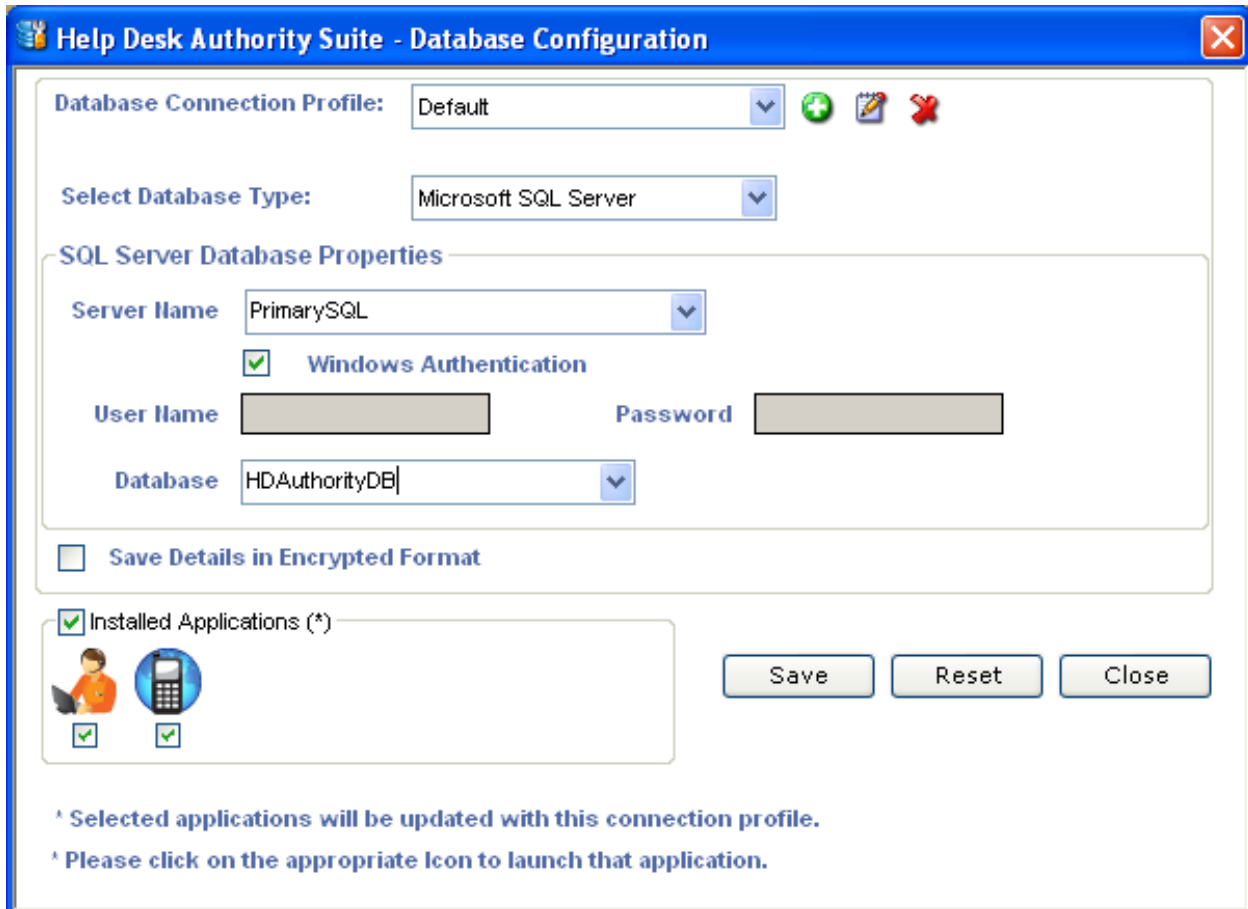
Click the **Finish** button to close the InstallShield Wizard.

2.2.3 Configure the HDMobile Web Service

If you checked the **Launch HD Configuration Editor** checkbox, the configuration editor will open automatically when the InstallShield Wizard closes.

If you did not check the checkbox you will have to open the *HD Configuration Editor* manually. Go to the folder: C:\Program Files\ScriptLogic\Common Files\HDConfigEditor\ and double-click on the **HDConfigEditor** application.

The **Help Desk Authority Suite – Database Configuration** window is shown in the graphic below.



The screenshot shows a window titled "Help Desk Authority Suite - Database Configuration". The window contains the following fields and controls:

- Database Connection Profile:** A dropdown menu set to "Default".
- Select Database Type:** A dropdown menu set to "Microsoft SQL Server".
- SQL Server Database Properties:**
 - Server Name:** A dropdown menu set to "PrimarySQL".
 - Windows Authentication**
 - User Name:** An empty text input field.
 - Password:** An empty text input field.
 - Database:** A dropdown menu set to "HDAuthorityDB".
- Save Details in Encrypted Format**
- Installed Applications (*)**
 - Icon of a person at a laptop:
 - Icon of a mobile phone:

At the bottom right, there are three buttons: "Save", "Reset", and "Close".

Below the buttons, there are two footnotes:

- ^{*} Selected applications will be updated with this connection profile.
- ^{*} Please click on the appropriate icon to launch that application.

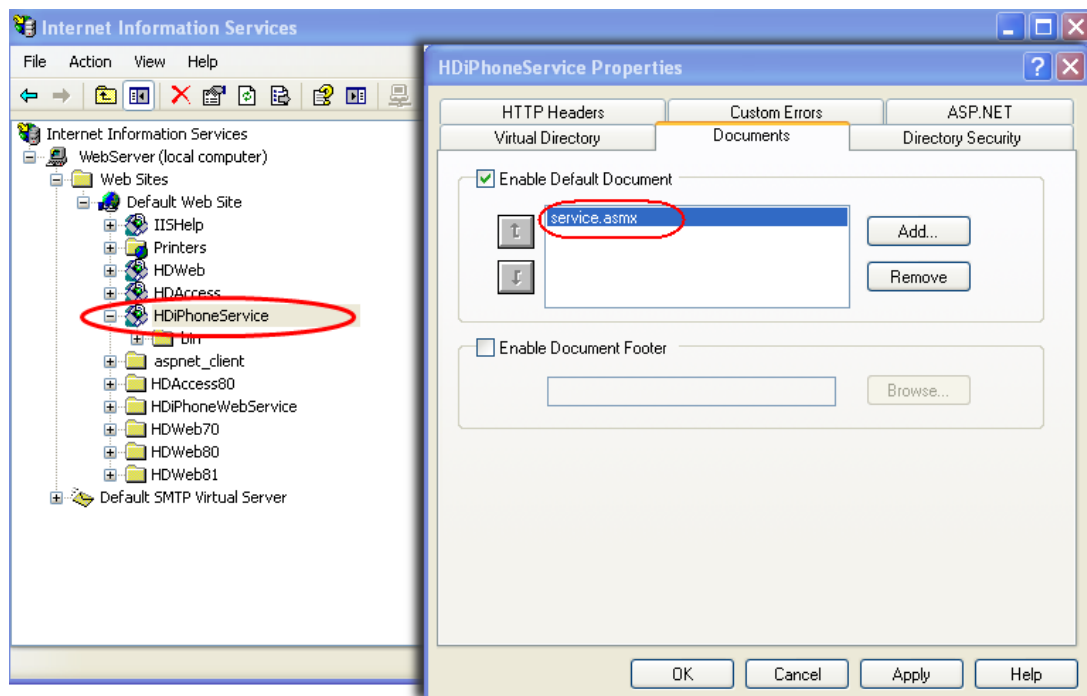
As you have already used the **Help Desk Authority Suite – Database Configuration** interface previously to configure the database for your *Help Desk Authority* application, the basic Database Connection information should not need to be changed. Click the **HDMobile icon** to include HDMobile in the configuration setup and click the **Save** button.



IIS HDiPhoneService – Service.asmx

The Service.asmx file should be located on the Documents tab within HDiPhoneService Properties in IIS. If not the Service.asmx file needs to be added to the “Documents” tab.

In addition, all other documents need to be removed for the iPhone app to work.



2.2.4 Test the HDMobile Web Service

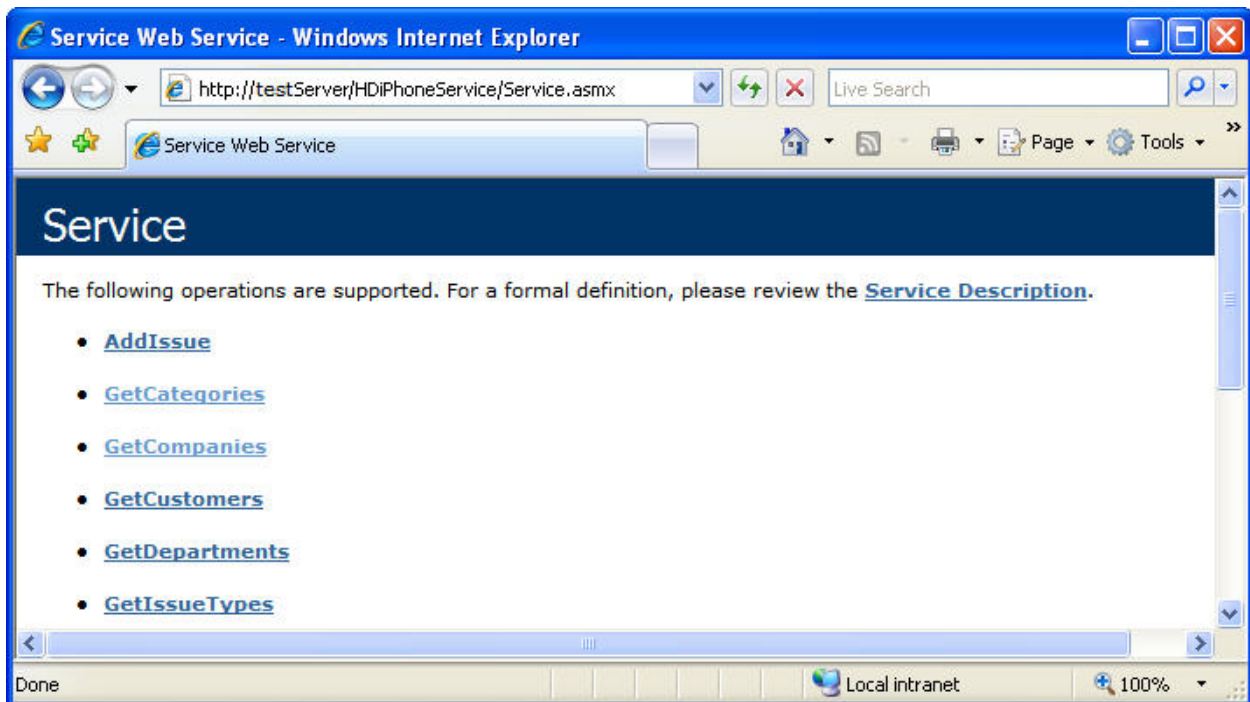
After configuring the HDMobile web service it is a good idea to test the web service to confirm it is operating properly.

To test the HDMobile Web Service open your web browser and enter the URL of your Web Service. This will be in the form:

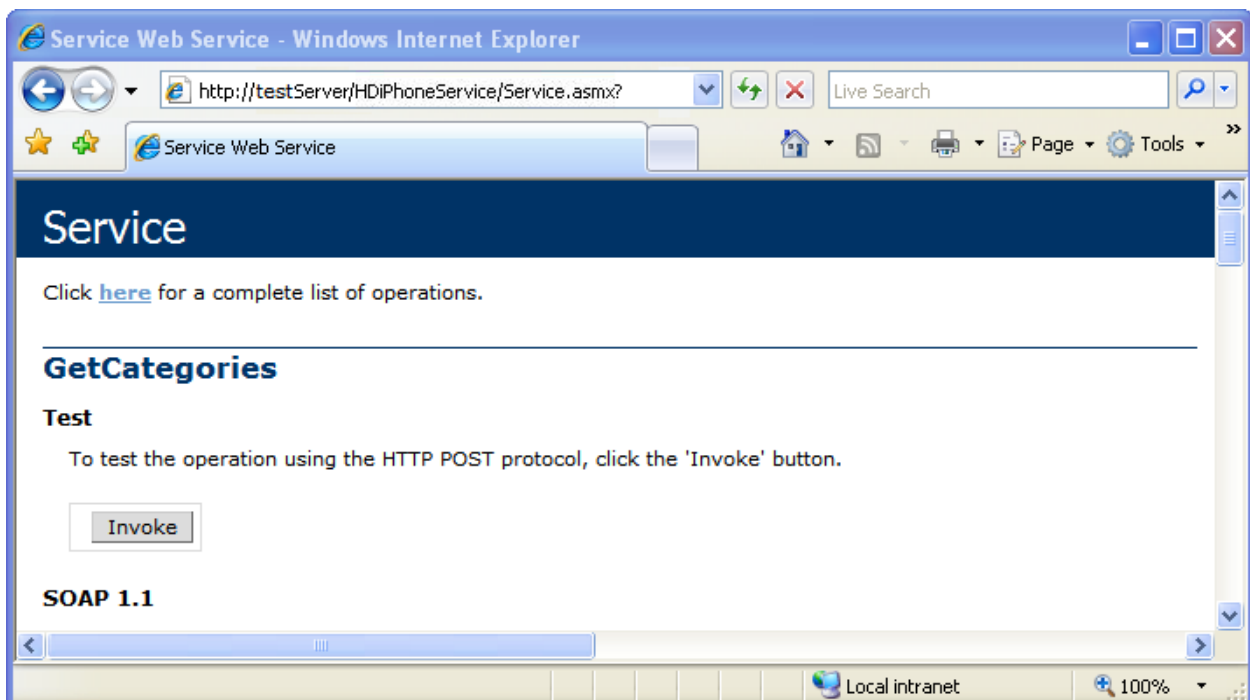
`http://WebServiceServerName/HDiPhoneService/Service.asmx,`

where *WebServiceServerName* is the name of your HDMobile web service host.

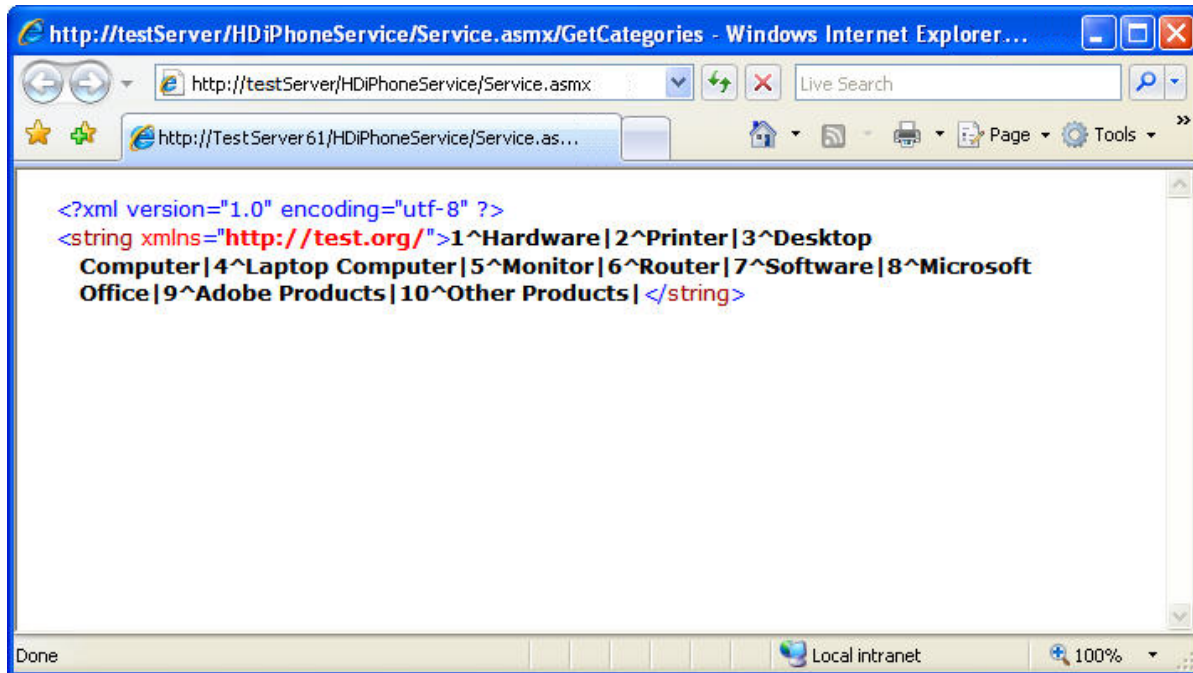
The **Service Web Service** window will open as shown in the next graphic.



Select the **GetCategories** link in the list. This will open the GetCategories test window below. To execute the test click the **Invoke** button

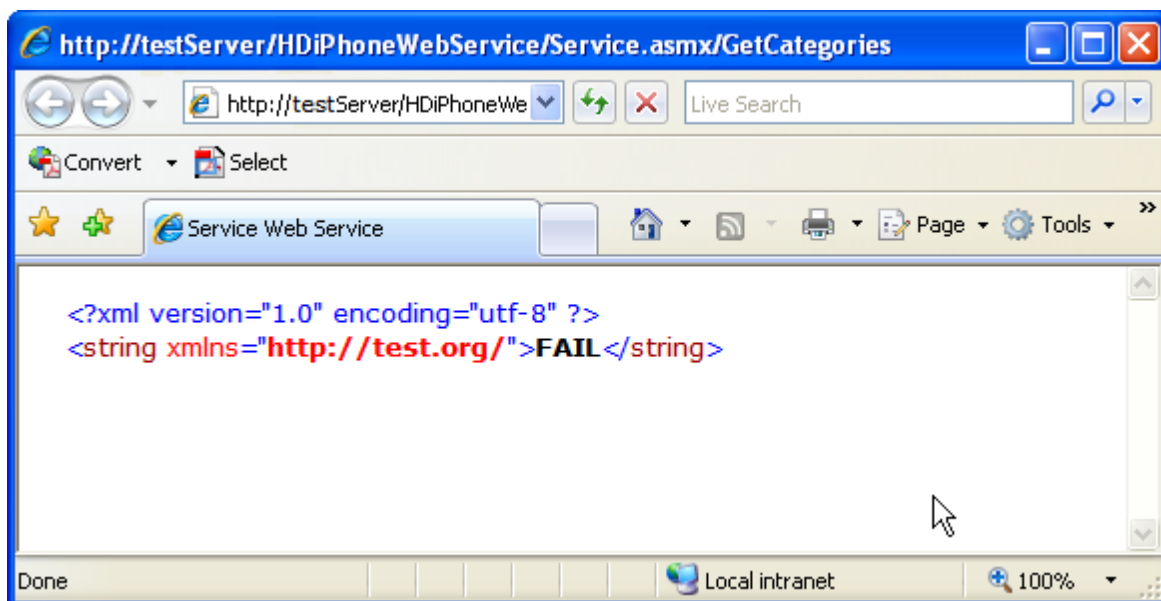


If the test is successful the following XML message will be displayed:



This is the XML message the *HDMobile* web service sends to the iPhone in response to a get categories request from the iPhone. You should examine the list of categories between the string tags and confirm this is the list you expect.

If the test fails you will see the next message displayed indicating there was a problem communicating with the *HDAuthority* database server.



There are a number of reasons why you might receive the fail message. If this happens you should check the configuration editor again to be sure the correct Database Connection Profile was selected. If you continue to receive a fail message please contact ScriptLogic.

2.3 Setup the iPhone to Communicate with Your Web Service

Start the *HDMobile* application by touching the *HDMobile* icon. The “Login” screen will display.

The first time you attempt to login you will need to setup the *HDMobile* app to connect with the database on your *Help Desk Authority* server.

To setup your web service, touch the **Pref** button in the upper-left corner of the Login screen. The Preferences screen will display. Then:



- 1) Touch **Web Service Configuration** to open the **URL** screen;
- 2) Enter the Web Service URL in the format:

`http://WebServiceServerName/HDiPhoneService/`,

where *WebServiceServerName* is the name of your iPhone web service host or you can use the IP address as in the example displayed. This is the same URL you used to test your iPhone Web Service earlier. [Note: you must have the '/' at the end of the URL.]


- 3) Touch **Save** to save the URL and return to the *Preferences* screen;
- 4) Touch **Done** to return to the *Login* screen;
- 5) Enter your *HDAuthority* login credentials to login as described in the next section.

When you open *HDMobile* in the future, the Web Service configuration will automatically populate.



2.4 Login

To login:

1. Touch the Logon Name field to display the keyboard.
2. Enter your *Help Desk Authority* user name in the Logon Name field.
3. Enter your *Help Desk Authority* password in the Password field.
4. Touch the  button.

After logging in the Issue List screen will display.



Login Problems

A number of circumstances can lead to login issues. Appendix D lists common login problems you may encounter.


Chapter 3: Working with Issues


Issue List is the main interface of the application. The issues in the Issue List are ordered by issue number. The issue summary is displayed as the title of each issue. Through the Issue List screen one can:


- Add new issues;
- Update existing issues;
- Resolve issues;
- Delete issues.

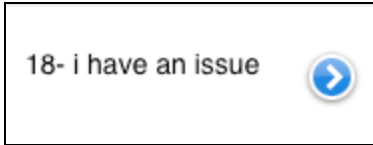


There are four controls on the Issue List screen:

 - Touch the Edit button to display the Issue List in delete issue mode. [See section 3.3]

 - Touch this add button to display the New Issue screen. [See section 3.1]



 - This is the filter for the Issue List. You can filter the list to display only the issues whose issue number begins with the numbers you enter in this textbox. Touch in the text box and a keyboard will appear to allow you to enter text.

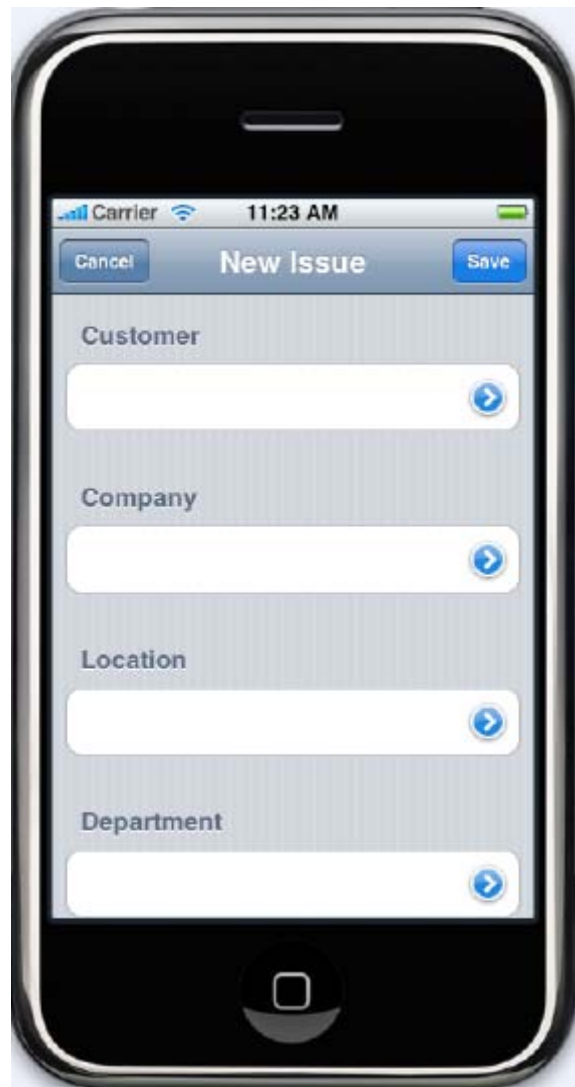
 - Touch the issues themselves to display the details of the individual Issues. [See section 3.2]


The issues displayed in the list are the results of the private query "iPhoneIssues" defined in the *Help Desk Authority* application. [See section 2.1 above]

3.1 How to Add New Issues

To add a new Issue:

1. Open the New Issue screen:
Touch the  button at the top-right corner of the Issue List screen.
2. Enter data into the issue fields:
Touch the required fields to open the modify screen for that field and enter the required data or select using the displayed picker for that field. Detailed descriptions of each field are given in Appendix A.
3. Save the New Issue to the *Help Desk Authority* database: Touch the  button. You will be prompted to confirm the save.




4. You can select "Yes" to save or "No" to abort the save procedure.
5. If you touch the "Yes" button the issue details will be synced with the remote *Help Desk Authority* database. A unique issue number is assigned to the issue record by the *Help Desk Authority* web service and is returned to the iPhone. You will be returned to the Issue List.
6. The newly added issue will be displayed in the issue list according to the issue number. The issue summary becomes the title of the issue.
7. If you would like to close the New Issue screen and return to the Issue List screen without saving select the  button.


3.2 How to Update Issue Fields

Updating an existing issue is very similar to adding a new issue.

To update an existing issue:



1. **Select the Issue to update:** Select the issue to be updated from the list in the Issue List screen.
2. **To modify an issue field:** Touch the field to be updated to open the modify screen for that field and enter the required data or select using the displayed picker for that field. A complete description of each field is given in Appendix A.
3. **Save the changes to the Help Desk Authority database:** Touch the  button. You will be prompted to confirm the save.




4. Select **“Yes” to save, “No”** to abort the save. If you touch the **“Yes”** button the issue details will be saved to the *Help Desk Authority* database and you will go back to the Issue List screen.
5. **Go back to Issues List Without Saving:** If you want to go back to the Issues List without saving, touch the  button.

3.3 How to Resolve an Issue

To resolve an issue:


1. **Select the Issue to resolve:**
Touch the issue to be resolved in the issue list of the Issue List screen.
2. **Resolve the issue:** touch the  button at the bottom of the Issue screen. This will change the status field to closed, fill in the Resolved By field with your name and set the Resolved Date to the current Date-Time.
3. **Save the change and go back to the Issue List screen:** Touch the  button. You will be prompted to confirm the save.





4. Select **"Yes"** to save, **"No"** to abort the save.
5. If you touch the **"Yes"** button the change in the resolution field will be saved to the *Help Desk Authority* database and the Issue List screen will be displayed.
6. If you touch the **"No"** button you will be taken to the Issue List screen and any changes you made will not be saved.
7. If you change your mind and want to go back to the Issues List without saving, touch the  button.

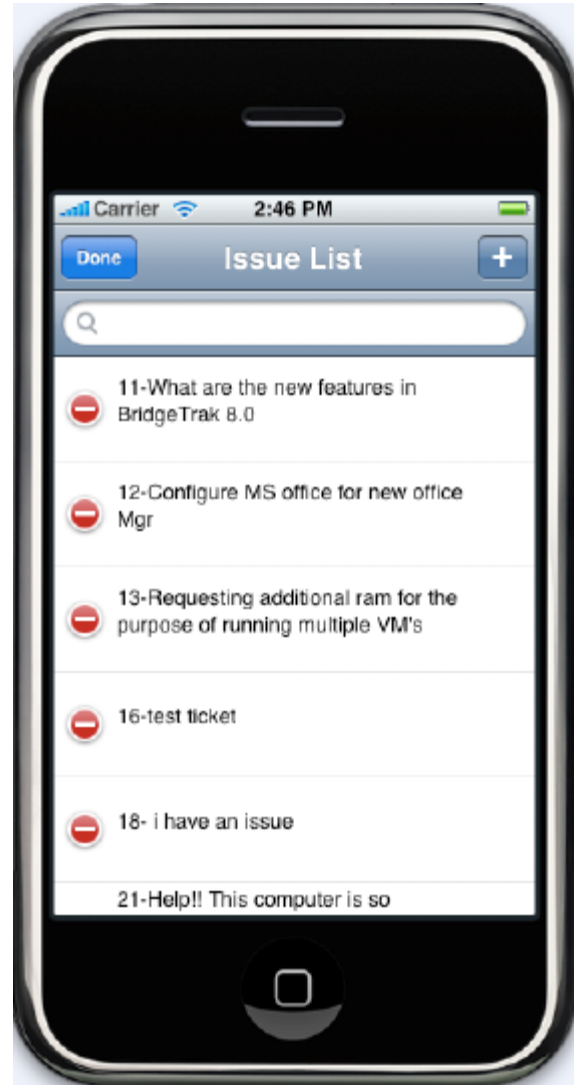
3.4 How to Delete an Issue

To delete an issue:







1. **Set Delete Mode:** Touch the  button on the *Issue List* screen to change to delete mode.
2. **Select the issue to delete:** Touch on the issue in the *Issue List* screen. The delete symbol beside the issue will rotate and the Delete button will be displayed as in the following graphic.









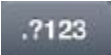







3. **Delete the issue:** Touch the  button. The issue will be deleted from both the HDMobile Issue List and the *Help Desk Authority* database.
4. **Exit Delete Mode:** Touch the  button.















Appendix A: Field Descriptions







Field	Description	Graphic
Customer	<p>To Add or Edit the Customer Field:</p> <ol style="list-style-type: none"> 1. Use the alphabetic wheel to display customers whose name starts with the required letter of the alphabet. 2. Select the customer's name from the list. 3. Touch the  button. 4. Touch the  button to exit the Customer screen without saving. 	
Company	<p>To Add or Edit the Company Field:</p> <ol style="list-style-type: none"> 1. Use the alphabetic wheel to display companies whose name starts with the required letter of the alphabet. 2. Select the companies name from the list. 3. Touch the  button. <p>Touch the  button to exit the Company screen without saving.</p>	







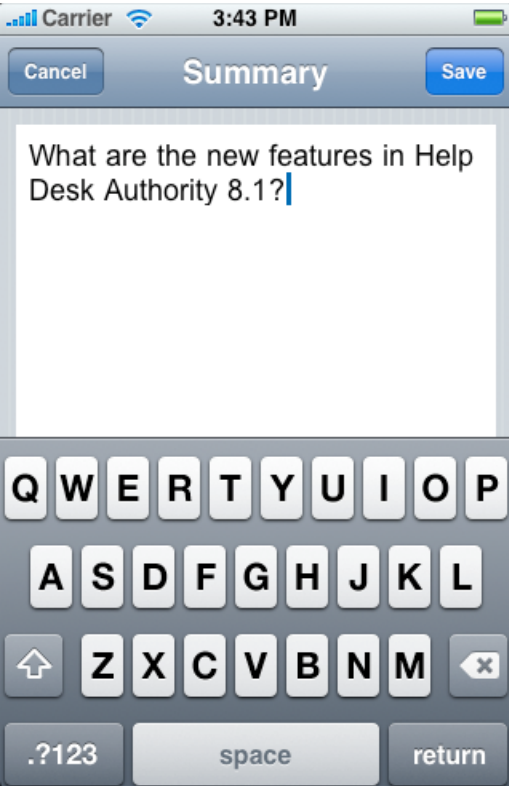
<p>Location</p>	<p>To Add or Edit the Location Field:</p> <ol style="list-style-type: none"> 1. Select the location from the list. 2. Touch the  button. <p>Touch the  button to exit the Location screen without saving.</p> <p>Note: Only locations associated with the selected company will be displayed.</p>	 <p>The screenshot shows the 'Location' screen with a 'Cancel' button on the left and a 'Save' button on the right. A text input field contains the word 'Atlanta'. Below the input field is a scrollable list with one item, 'Atlanta', which is highlighted in blue to indicate it is selected.</p>
<p>Department</p>	<p>To Add or Edit the Department Field:</p> <ol style="list-style-type: none"> 1. Select the department from the list. 2. Touch the  button. <p>Touch the  button to exit the Department screen without saving.</p>	 <p>The screenshot shows the 'Department' screen with a 'Cancel' button on the left and a 'Save' button on the right. A text input field contains the word 'Design'. Below the input field is a scrollable list with one item, 'Design', which is highlighted in blue to indicate it is selected.</p>






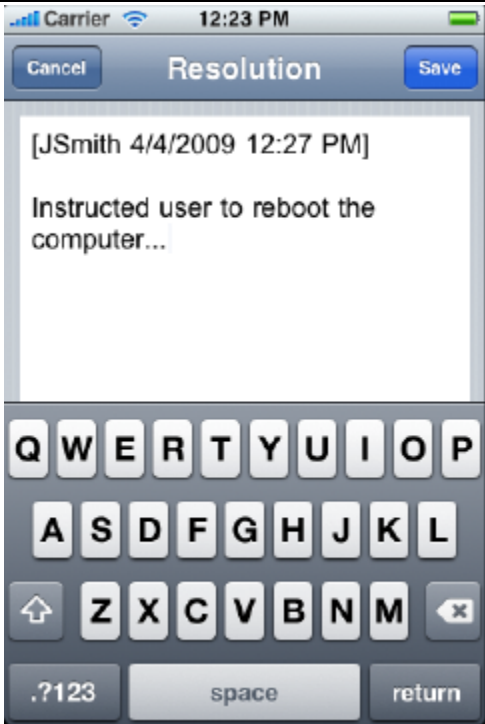
<p>Phone</p>	<p>To Add or Edit the Phone Field:</p> <ol style="list-style-type: none"> 1. Touch the  button beside the space bar in the keyboard. 2. Enter the phone number using the keyboard. 3. Touch the  button. <p>Touch the  button to exit the Phone screen without saving.</p>	
<p>Date Received</p>	<p>To Add or Edit the Date Received Field:</p> <ol style="list-style-type: none"> 1. Enter the date. 2. Touch the  button. 3. Enter the time. 4. Touch the  button. <p>Touch the  button to exit the Date Received screen without saving.</p>	








<p>Status</p>	<p>To Add or Edit the Status Field:</p> <ol style="list-style-type: none"> 1. Select the required status from the list. 2. Touch the  button. <p>Touch the  button to exit the Status screen without saving.</p> <p>Note: This field will be auto-populated with the Closed-status when the user touches the “Resolve” button in the Issue screen.</p>	
<p>Sub-Status</p>	<p>To Add or Edit the Sub-Status Field:</p> <ol style="list-style-type: none"> 1. Select the required sub-status from the list. 2. Touch the  button. <p>Touch the  button to exit the Sub-Status screen without saving.</p> <p>Note: The Sub-Status options displayed will depend on the Status of the Issue.</p>	

<p>Priority</p>	<p>To Add or Edit the Priority Field:</p> <ol style="list-style-type: none"> 1. Select the required priority from the list. 2. Touch the  button. <p>Touch the  button to exit the Priority screen without saving.</p>	
<p>Issue Type</p>	<p>To Add or Edit the Issue Type Field:</p> <ol style="list-style-type: none"> 1. Select the required Issue Type from the list. 2. Touch the  button. <p>Touch the  button to exit the Issue Type screen without saving.</p>	

<p>Category</p>	<p>To Add or Edit the Category Field:</p> <ol style="list-style-type: none"> 1. Select the required category from the list. 2. Touch the  button. <p>Touch the  button to exit the Category screen without saving.</p>	
<p>Assigned User</p>	<p>To Add or Edit the Assigned User Field:</p> <ol style="list-style-type: none"> 1. Select the required user from the list. 2. Touch the  button. <p>Touch the  button to exit the Assigned User screen without saving.</p>	








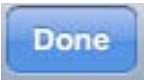


<p>Due Date</p>	<p>To Add or Edit the Due Date:</p> <ol style="list-style-type: none"> 1. Enter the date. 2. Touch the  button. 3. Enter the time. 4. Touch the  button. <p>Touch the  button to exit the Due Date screen without saving.</p>	
<p>Summary</p>	<p>To Add or Edit the Summary:</p> <ol style="list-style-type: none"> 1. Use the keyboard to enter the summary. 2. Touch the  button. <p>Touch the  button to exit the Summary screen without saving.</p>	


<p>Description</p>	<p>To Add or Edit the Description:</p> <ol style="list-style-type: none"> 1. Use the keyboard to enter the description. 2. Touch the  button. <p>Touch the  button to exit the Description screen without saving.</p>	
<p>Resolution</p>	<p>To Add or Edit the Resolution:</p> <ol style="list-style-type: none"> 1. Use the keyboard to enter the resolution. 2. Touch the  button. <p>Touch the  button to exit the Resolution screen without saving.</p>	

<p>Resolved By</p>	<p>To Add or Edit the Resolved By Field:</p> <ol style="list-style-type: none"> 1. Select the required user from the list. 2. Touch the  button. <p>Touch the  button to exit the Resolved By screen without saving.</p>	
<p>Resolved Date</p>	<p>To Add or Edit the Due Date:</p> <ol style="list-style-type: none"> 1. Enter the date. 2. Touch the  button. 3. Enter the time. 4. Touch the  button. <p>Touch the  button to exit the Resolved Date screen without saving.</p>	

Appendix B: Command Buttons

HDMobile has various buttons to perform some action or navigate in the application. While working in *HDMobile* you will encounter following actions/navigations:

Command Button	Functions
	Add Button –use the Add button to open the New Issue Screen.
	Edit Button –use this button to change the Issue List interface from normal mode to issue delete mode.
	Blue Arrow Button – The blue arrow button in a field indicates that field can be selected for further processing.
 	Red bar button – The horizontal red bar button in a field indicates that field is in issue delete mode. When a user touches on this button, the button rotates into a vertical position and a Delete button is displayed next to that issue record. Touch the red bar button in the vertical position to rotate it back to the horizontal position and remove the Delete button.
	Delete Button – Use the delete button to delete the issue from the iPhone Issue List and the <i>Help Desk Authority</i> database.
	Resolve Button – Use the resolve button to set the issue status to resolved. When you touch this button the Status is changed to “Closed”, the Resolved By field is populated with the Logged on user name and the Resolved Date is set to the current Date-Time.
	Done Button – The Done button generally is used to let the application know that you have completed an operation and want to return to the previous screen/mode.
	Save Button – Use the Save button to save changes you have made on the iPhone.
	Cancel Button – Use the Cancel button to exit the current screen and return to the previous screen without saving any

	changes you may have made.
 The image shows two rectangular buttons with a blue gradient and a slight shadow. The left button is labeled 'Yes' and the right button is labeled 'No'.	<p>Yes/No buttons – you may be prompted with action confirmation messages which give you the opportunity to continue or abort an action.</p> <p>Touch the “Yes” button to complete the action or select the “No” button to abandon the action.</p>

Appendix C: Query Management

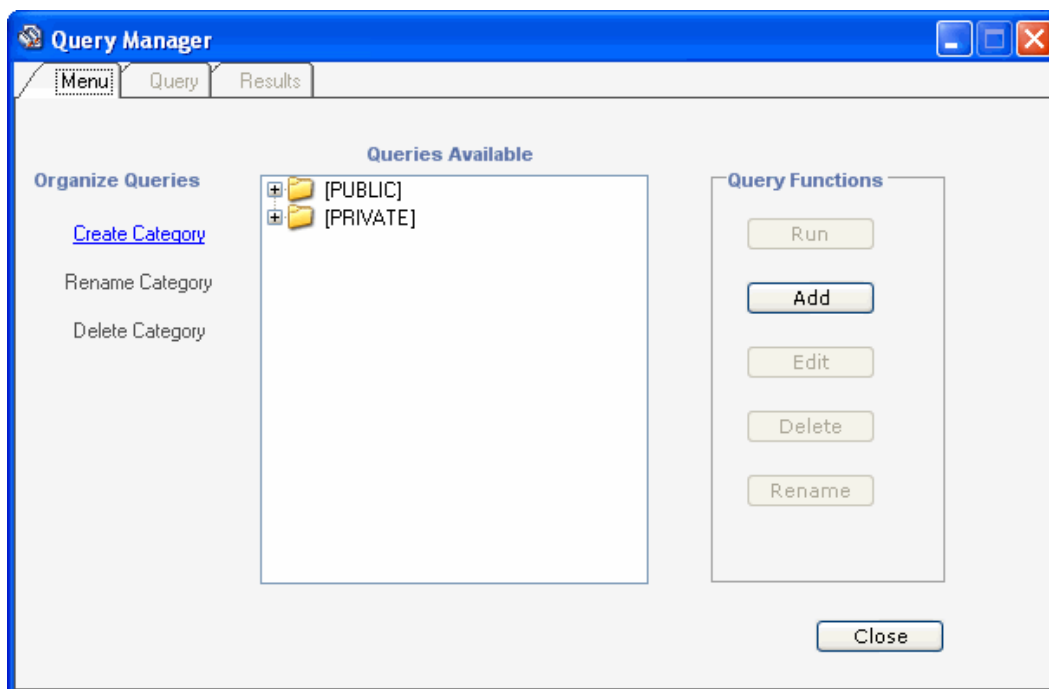
You create iPhoneIssues queries to select the list of issues you want to work with on your iPhone. For example, you may want a list of all the issues assigned to you for the “AAA Acme Co” since the 1st of the year that have a status of open but you do not want any issues from the AAA Acme Co. printing department. This Appendix gives detailed instructions on how to create this or any other issue query in *Help Desk Authority*.

C1.0 Overview

When you create an issue query:

- Select the issue fields;
- Specify the conditions each issue field must satisfy;
- Test the Query;
- Save the Query.

First, open the Query Manager Window click on **Tools | Query Manager**. *Help Desk Authority* will display the Query Manager window, shown below:



The Query Manager window consists of three tabs:

- **Menu** – The Menu tab is where you define Categories, select Queries that have already been defined, and initiate all Query functions (i.e., Run, Add, Modify, Delete, and Rename).
- **Query** – The Query tab is where you define the Conditions that must be satisfied when your Query is run.
- **Results** – The Results tab shows the Issues that have met the Conditions of your Query when the Query is run.

To define a new Query, click on the **Add** button in the **Query Functions** panel. *Help Desk Authority* will take you to the **Query** tab, shown below:



On the **Query** tab you select the Issue fields you want to use from the **Available fields for filtering** list. As described in the next section you define the conditions for each field as it is selected. After all fields are selected additional constraints are imposed by using the Not, And, Or and parenthesis buttons to the right of the Conditions for filtering text box.

C2.0 Query Conditions

As you select each field you define the value or condition each issue must possess in this field in order to be included in the iPhoneIssues result list.

You will find that the condition dialog windows for the various types of fields can best be classified as one of the following:

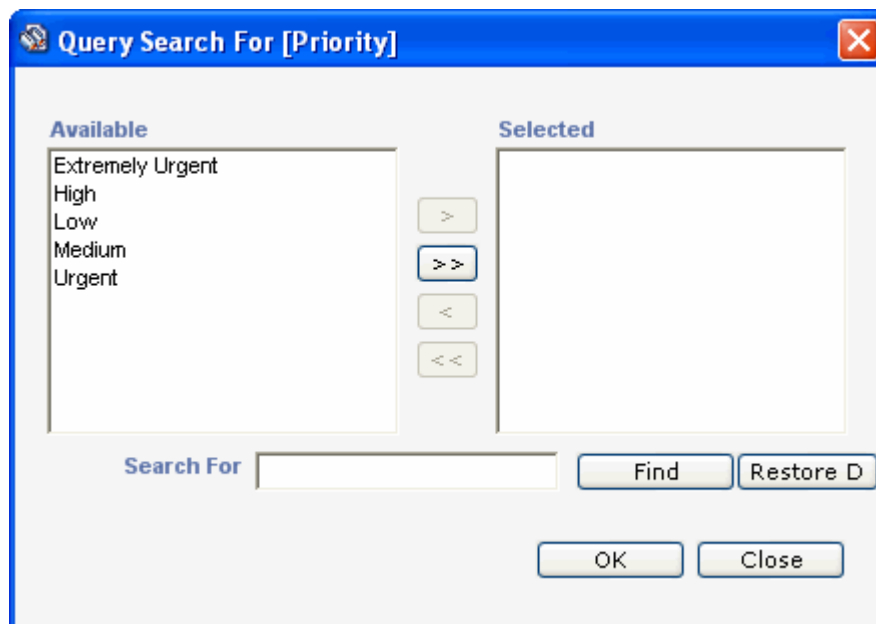
- Selected Item
- Text Search
- Date Selection
- Numeric
- Equal To

Each of these types is described in the sections that follow.

C2.1 Selected Item – Priority, Issue Type, Department, etc.

A Selected Item field is one with a user-defined set of values. For example, the **Company** field contains the names of the Companies defined by your organization via **Setup | Companies**. A Selected Item field can also be a user-defined code list such as **Priority**, which contains the Issue Priority codes defined by your organization via **Setup | Define Tables | Issue Priorities**.

When you choose a Selected Item field from the **Available fields for filtering** list, and then click on the **Condition** button, *Help Desk Authority* displays a Query Search window, like the one shown below:



This example shows the Query Search window for the Priority field. The **Available** pane shows all Priority codes that have been defined for your organization. Move the codes that you want to search for from the **Available** pane to the **Selected** pane using the arrow buttons.

If the list of Available codes is large, you can use the **Search For** field in the Query Search window. Simply enter the code that you want to find in the **Search For** field and then click on **Find**. *HDAuthority* will locate the code and display it in the **Available** pane. Click on the **Restore** button to restore the original code list to the **Available** window.

If the Selected Item field that you choose is one of the following:

- Asset
- Company
- Contract
- Customer
- Product

When you click on the **Condition** button for Company for example, *Help Desk Authority* will display a search window like the one shown below:

The screenshot shows a window titled "Companies" with a close button in the top right corner. The window contains a search form with the following fields:

- Company Name
- Email Domain
- Main Phone
- City
- State
- Postal Code

Below the fields are two buttons: "Search" and "Reset". A note below the fields reads: "Note: You may enter partial or full search criteria above." Below the search form is a table with three columns: "Company Name", "Email Domain", and "Main Phone". At the bottom right of the window are two buttons: "Select" and "Cancel".

Click on **Search** to populate the window with the records that have been defined for your organization. Use the search criteria fields if the list of records is large. Then,

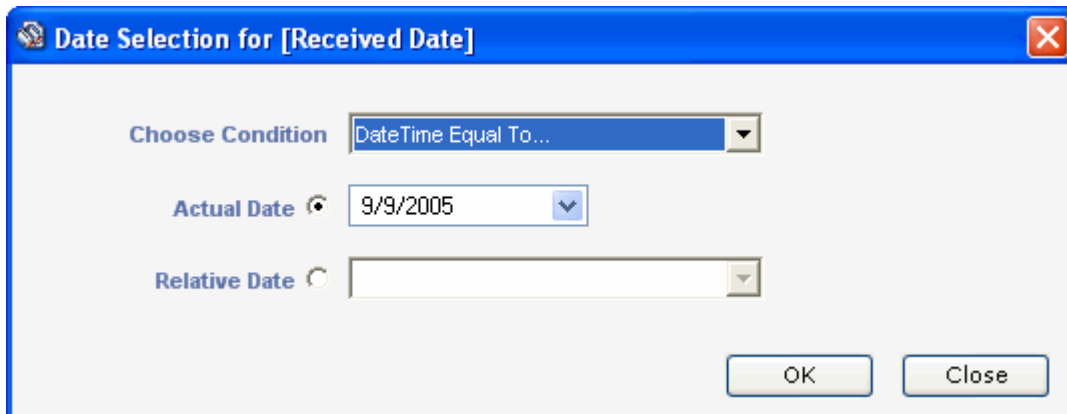
double-click on the record that has the field value you want - a company name in this example.

After selecting the record(s) or code(s) to define your condition, click on **OK**. *Help Desk Authority* will display your Condition in the **Condition(s) for filtering** pane in the Query Manager window, as shown in the example below:



C2.2 Date Selection – Created, Due, Received, Resolved or Updated Date

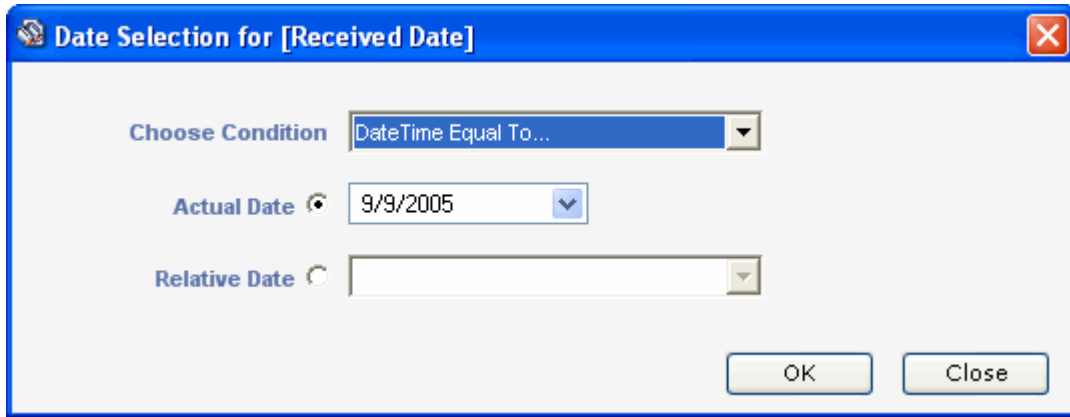
A Date Selection field records a point in time or a specific day of the year. When you choose a Date Selection field from the Available fields for filtering list, and then click on the Condition button, *Help Desk Authority* displays a Date Selection window, like the one shown below:



As an example, this is the Date Selection window for the Received Date field. In the Choose Condition drop-down menu, you can select one of the following:

- Date Time Equal To
- Date Time Less Than
- Date Time Greater Than
- Date Time in Range
- Date Time is Null

If you choose Date Time Equal To, Date Time Less Than, or Date Time Greater Than, the Date Selection window will look like the one shown below:



Choose either the Actual Date or Relative Date radio button. If you choose Actual Date, select a specific date from the pop-up calendar.

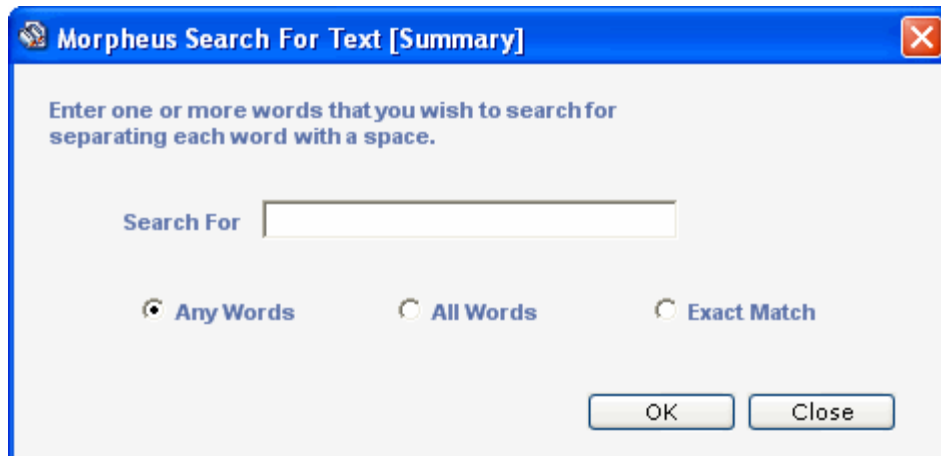
If you choose the Relative Date radio button, you may then select one of the following from the drop-down menu:

- Today
- Yesterday
- This Week
- Last Week
- This Month
- Last Month
- This Quarter
- Last Quarter
- This Year
- Last Year

C2.3 Text Search – Description, Phone, Resolution or Summary

A Text Search field allows the entry of alphanumeric, free-form text. This could be a field that allows an unlimited amount of text or one with a fixed field length.

When you choose a Text Search field from the **Available** fields for filtering list, and then click on the **Condition** button, *Help Desk Authority* displays a Search for Text window, like the one shown below:



As an example, this is the Search for Text window for the **Summary** field. In the **Search For** field, enter the word(s) that you want the Query to search for in the selected free-form text field (in this case, the **Summary** field). Each word must be separated with a space.

Then, choose one of the following radio buttons:

Choose	To
Any Words	Find those Issues whose free-form text field contains any of the words entered in the Search For field.
All Words	Find those Issues whose free-form text field contains all words entered in the Search For field.
Exact Match	Find those Issues whose free-form text field contains an exact match to the text entered in the Search For field.

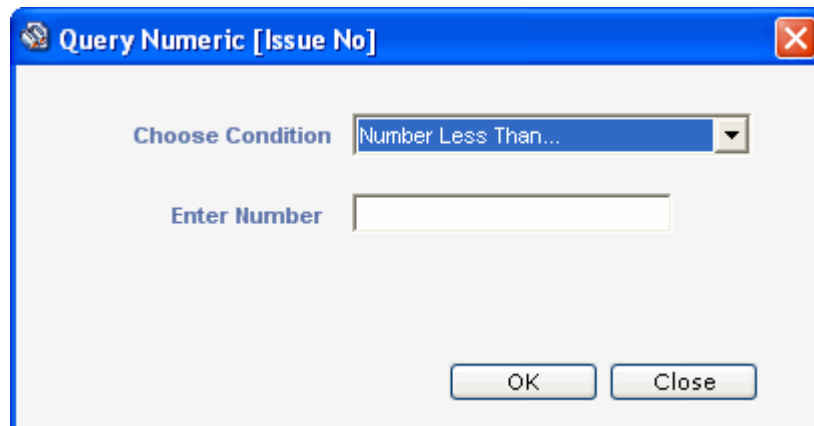
After entering the word(s) you want to search for, click on **OK**. *Help Desk Authority* will display your Condition in the **Condition(s) for filtering** pane in the Query Manager window, as shown in the example below:



C2.4 Numeric – Issue No

A Numeric field contains only whole numbers. As a whole number, the greater than, less than, in range, and equal to Conditions apply.

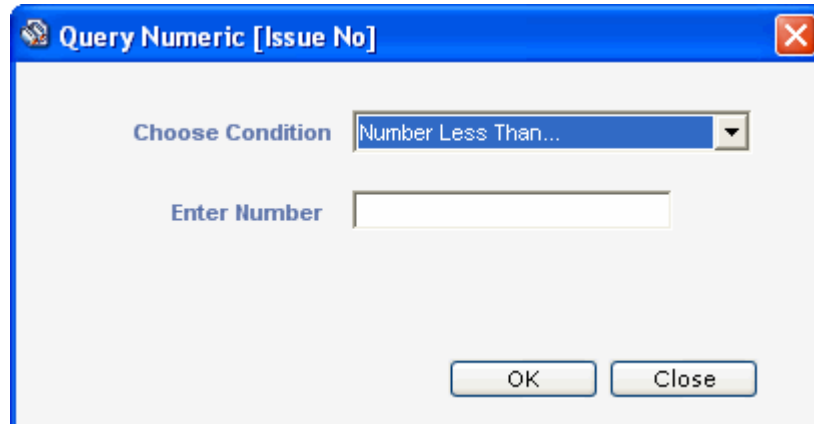
When you choose a numeric field from the **Available fields for filtering** list, and then click on the **Condition** button, *Help Desk Authority* displays a Query Numeric window, like the one shown below:



As an example, this is the Query Numeric window for the **Issue No** field. In the **Choose Condition** drop-down menu, you can select one of the following:

- Number Less Than
- Number Equal To
- Number Greater Than
- Number in Range

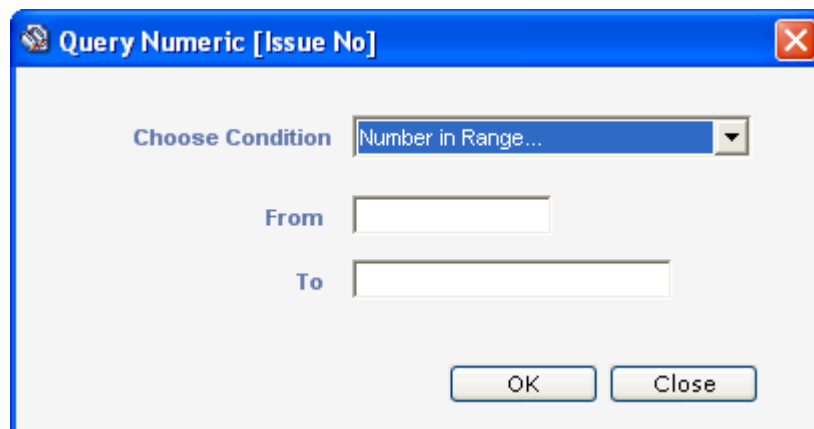
If you choose Number **Less Than**, **Number Equal To**, or **Number Greater Than**, *HDAuthority* will display the **Enter Number** field, as shown in the example below:



The screenshot shows a dialog box titled "Query Numeric [Issue No]". It has a blue header bar with a close button (X) on the right. The main area is light gray. There is a label "Choose Condition" followed by a dropdown menu showing "Number Less Than...". Below that is a label "Enter Number" followed by a text input field. At the bottom right are two buttons: "OK" and "Close".

In the **Enter Number** field, enter the number to be used in the Condition.

If you choose **Number in Range** from the **Choose Condition** drop-down menu, *HDAuthority* will display the **From** and **To** fields, shown below:



The screenshot shows a dialog box titled "Query Numeric [Issue No]". It has a blue header bar with a close button (X) on the right. The main area is light gray. There is a label "Choose Condition" followed by a dropdown menu showing "Number in Range...". Below that are two labels: "From" and "To", each followed by a text input field. At the bottom right are two buttons: "OK" and "Close".

Enter the range of numbers for the Condition. Enter the beginning number in the **From** field and the ending number in the **To** field.

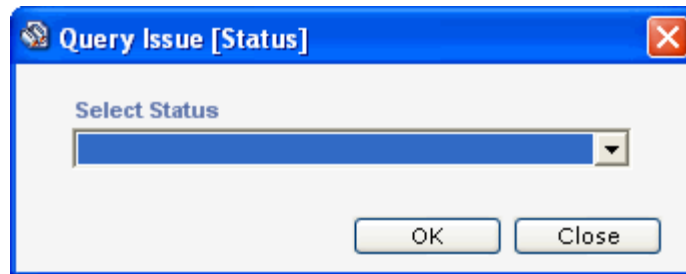
After entering your numeric information, click on **OK**. *HDAuthority* will display your Condition in the **Condition(s) for filtering** pane in the Query Manager window, as shown in the example below:



C2.5 Equal To - Status

The Equal To Condition applies to only one field, which is **Status**. **Status** is unique because its codes are system-defined and are part of every *HDAuthority* installation.

If you choose **Status** as your Query field and then click on the **Condition** button, *HDAuthority* will display a window, like the one shown below:



When you click on the drop-down menu, the four system-defined Statuses are displayed. They are:

- Open
- Closed
- Pending
- Reopened

Choose the appropriate Status and then click on **OK**. *HDAuthority* will display your Condition in the **Condition(s) for filtering** pane in the Query Manager window, as shown in the example below:



C4.0 Issue Fields Table

The table below shows the fields in the **Available fields for filtering** list along with the type of Query and a description of the field as it relates to the Issue window. You may choose as many of the following fields as you like.

Field	Type	Description (as it relates to the Issue)
Asset	Selected Item	This is the Asset link on the Asset tab of the Issue window.
Assigned Group	Selected Item	This is the Assigned Group drop-down menu field in the Issue window. This is the Group to which the Issue is assigned.
Assigned User	Selected Item	This is the Assigned User drop-down menu field in the Issue window. This is the User to whom the Issue is assigned.
Build	Text Search	This is the Build field on the Product/Contract tab in the Issue window.
Category	Selected Item	This is the Category link in the Issue window.
Company	Selected Item	This is the Company field in the Issue window. It defaults from the Customer record that is selected. This is the Company that is reporting the Issue.
Contract	Selected Item	This is the Contract link on the Product/Contract tab in the Issue window.
Created Date	Date Selection	This is a system-generated value that is assigned to the Issue record, internally. The Created Date is the date and time that the Issue record is initially created.
Created User	Selected Item	This is a system-defined value that is assigned to the Issue record, internally. The Created User is the <i>HDAuthority</i> User logged in to the system at the time the Issue is initially created.
Customer	Selected Item	This is the Customer link in the Issue window. This is the Customer who reported the Issue.
Department	Selected Item	This is the Department field in the Issue window. It defaults from the Company record associated with the Customer. If the Customer reporting the Issue is not associated with a Company, this field will be empty.

Field	Type	Description (as it relates to the Issue)
Due Date	Date Selection	This is the Due Date field in the Issue window. This is the date on which the Issue is due for follow-up or additional action. The value in this field is automatically calculated by taking the Date Received and adding to it the Due Days, Hours, and Minutes specified by the value in the Priority field.
Issue No	Numeric	This is the Issue No field in the Issue window. It is generated automatically by <i>HDAuthority</i> in consecutive order as new Issues are opened.
Issue Type	Selected Item	This is the Issue Type drop-down menu field in the Issue window.
Location	Selected Item	This is the Location field in the Issue window. It defaults from the Company record associated with the Customer. If the Customer reporting the Issue is not associated with a Company, this field will be empty.
Phone	Text Search	This is the Phone field in the Issue window. It defaults from the phone number for the Customer who is reporting the Issue.
Priority	Selected Item	This is the Priority drop-down menu field in the Issue window.
Product	Selected Item	This is the Products link on the Product/Contract tab in the Issue window.
Received Date	Date Selection	This is the Date Received field in the Issue window. It is automatically populated with the date and time that the Issue was initially opened. It can be overwritten, if necessary.
Resolved By	Selected Item	This is the Resolved By field on the Resolution tab in the Issue window.
Resolved Date	Date Selection	This is the Resolved Date field on the Resolution tab in the Issue window.
Status	Is Equal To	This is the Status field in the Issue window.
Sub-Status	Selected Item	This is the Sub-Status field in the Issue window.
Summary	Text Search	This is the Summary field in the Issue window.

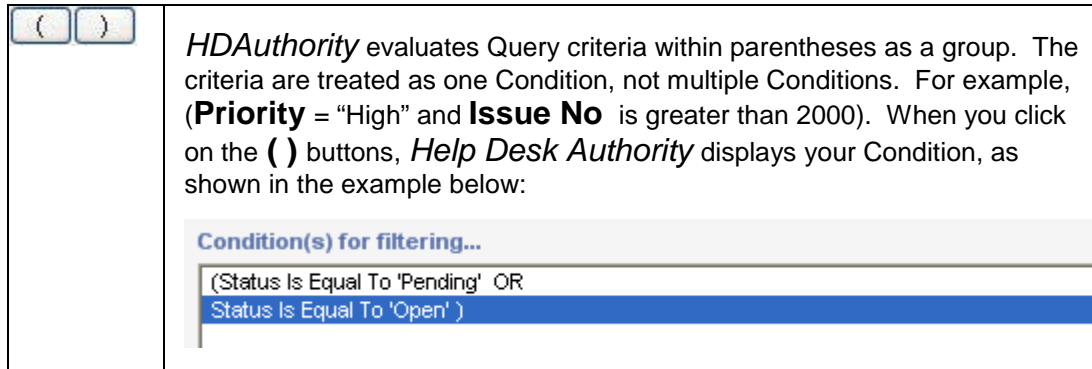
Field	Type	Description (as it relates to the Issue)
Updated By	Selected Item	This is a system-generated value that is assigned to the Issue record, internally. The Updated By value is the User who was logged in to <i>HDAuthority</i> when the last change was made to the Issue.
Update Date	Date Selection	This is a system-generated value that is assigned to the Issue record, internally. The Updated Date is the date and time that the Issue record was last modified.
Version	Text Search	This is the Version field on the Product/Contract tab in the Issue window.

In addition to the fields detailed above, you may also use any Custom Fields that have been defined for your organization. These fields come from the Custom Fields tab in the Issue window.

C5.0 Query Operators

To further define your Query, *Help Desk Authority* provides the following operator buttons to the right of the Conditions for filtering pane.

Operator	Description
<div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px auto;">Not</div>	<p>The Not operator allows you to specify that <i>HDAuthority</i> use the opposite of the specified Condition. For example, if you have specified 7/1/2005 as the Resolved Date and then you click on Not, <i>HDAuthority's</i> Query results would display all Issues that were not resolved on July 1, 2005. When you click on the Not operator button, <i>Help Desk Authority</i> displays your Condition as shown in the example below:</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p style="color: blue; font-weight: bold; margin: 0;">Condition(s) for filtering...</p> <p style="margin: 0;">NOT Resolved Date Is Equal To 7/1/2005</p> </div>
<div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px auto;">And</div>	<p>The And operator allows you to specify more than one criterion. The Issue must meet all criteria before it can be found by the Query. For example, Issues with a Received Date of July 1, 2005 and a Status equal to "Pending". When you click on the And operator button, <i>Help Desk Authority</i> displays your Condition as shown in the example below:</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p style="color: blue; font-weight: bold; margin: 0;">Condition(s) for filtering...</p> <div style="background-color: #0056b3; color: white; padding: 2px; margin: 2px 0;">Status Is Equal To 'Pending' AND</div> <p style="margin: 0;">Received Date Is Equal To 7/1/2005</p> </div>
<div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px auto;">Or</div>	<p>The Or operator allows you to specify either one Condition or another. If the Issue satisfies one Condition or another, it will be found by the Query. For example, Issues with a Status of "Pending" or a Status of "Open". When you click on the Or operator button, <i>Help Desk Authority</i> displays your condition as shown in the example below:</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p style="color: blue; font-weight: bold; margin: 0;">Condition(s) for filtering...</p> <p style="margin: 0;">Status Is Equal To 'Pending' OR Status Is Equal To 'Open'</p> </div>



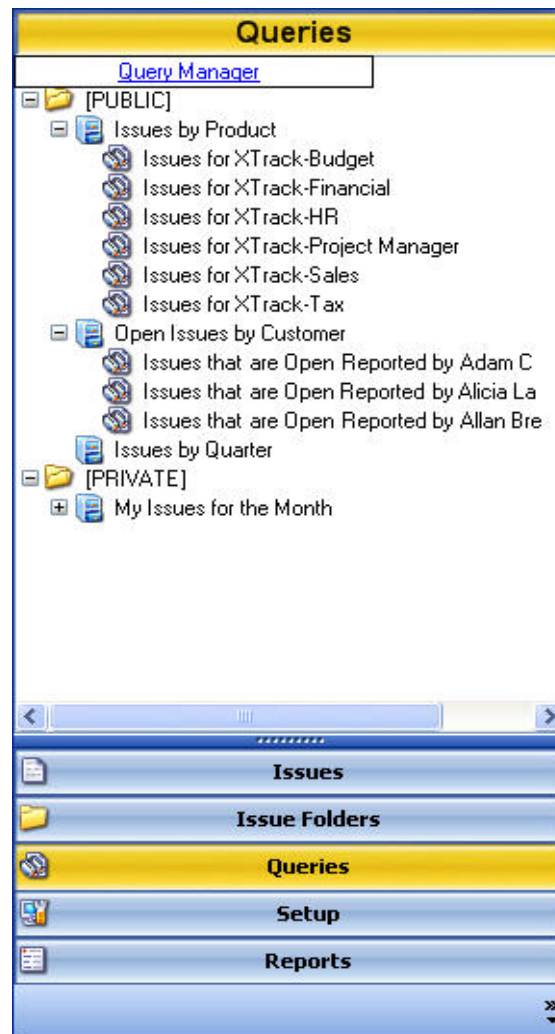
The screenshot shows a user interface for HDAuthority. On the left, there are two buttons: one with a left parenthesis '(' and one with a right parenthesis ')'. To the right of these buttons is a text area containing the following text: *HDAuthority* evaluates Query criteria within parentheses as a group. The criteria are treated as one Condition, not multiple Conditions. For example, (**Priority** = "High" and **Issue No** is greater than 2000). When you click on the () buttons, *Help Desk Authority* displays your Condition, as shown in the example below:

Below the text is a rectangular box with a light gray header that reads "Condition(s) for filtering...". Inside this box, the text "(Status Is Equal To 'Pending' OR Status Is Equal To 'Open')" is displayed. The second line of this text, "Status Is Equal To 'Open')", is highlighted with a blue background.

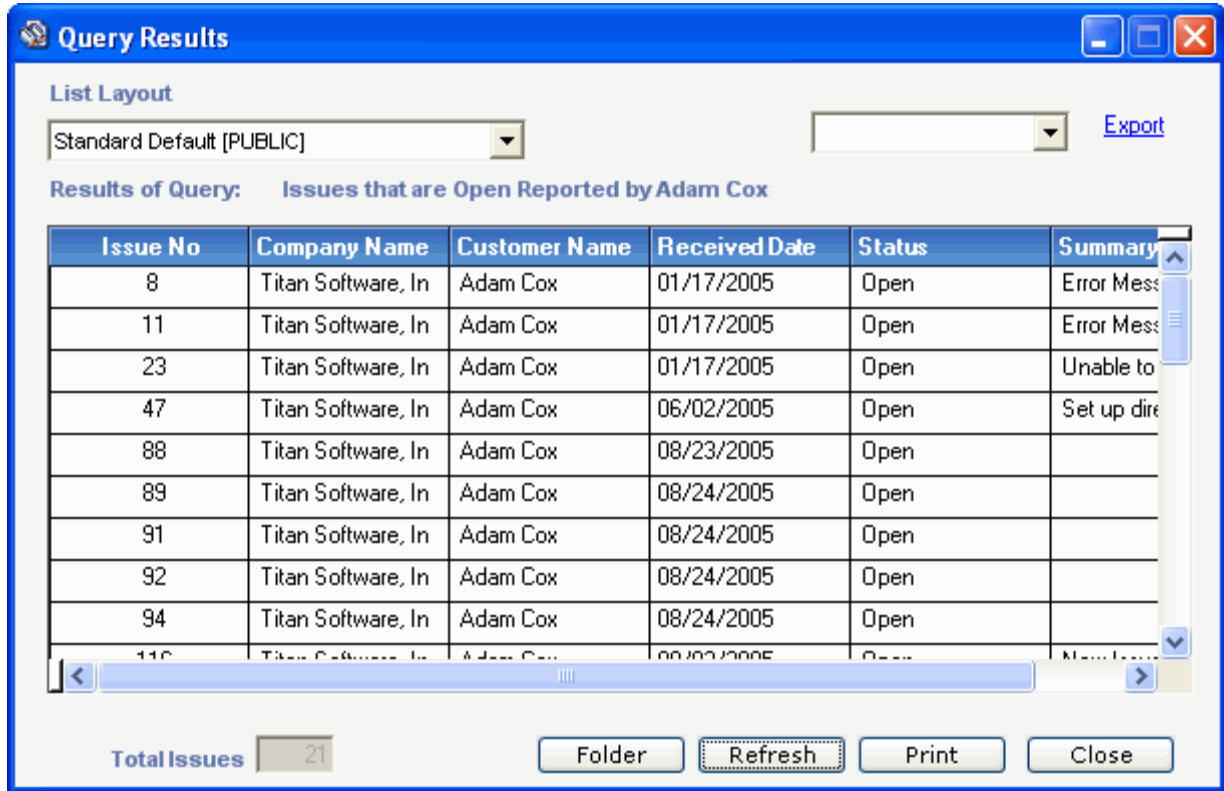
C6.0 Running Queries

When a Query is run, *Help Desk Authority* searches all Issues and finds the ones matching the Query's criteria. It then takes those Issue records and displays them in the format defined in the specified List Layout.

Once a Query is defined, saved, and filed in a Category it can be run at any time with a simple click of your mouse. This is accomplished by displaying Queries in the Navigation pane of the main *Help Desk Authority* menu. An example is shown below. (For more information, see "Navigation Pane" in this user's manual.)



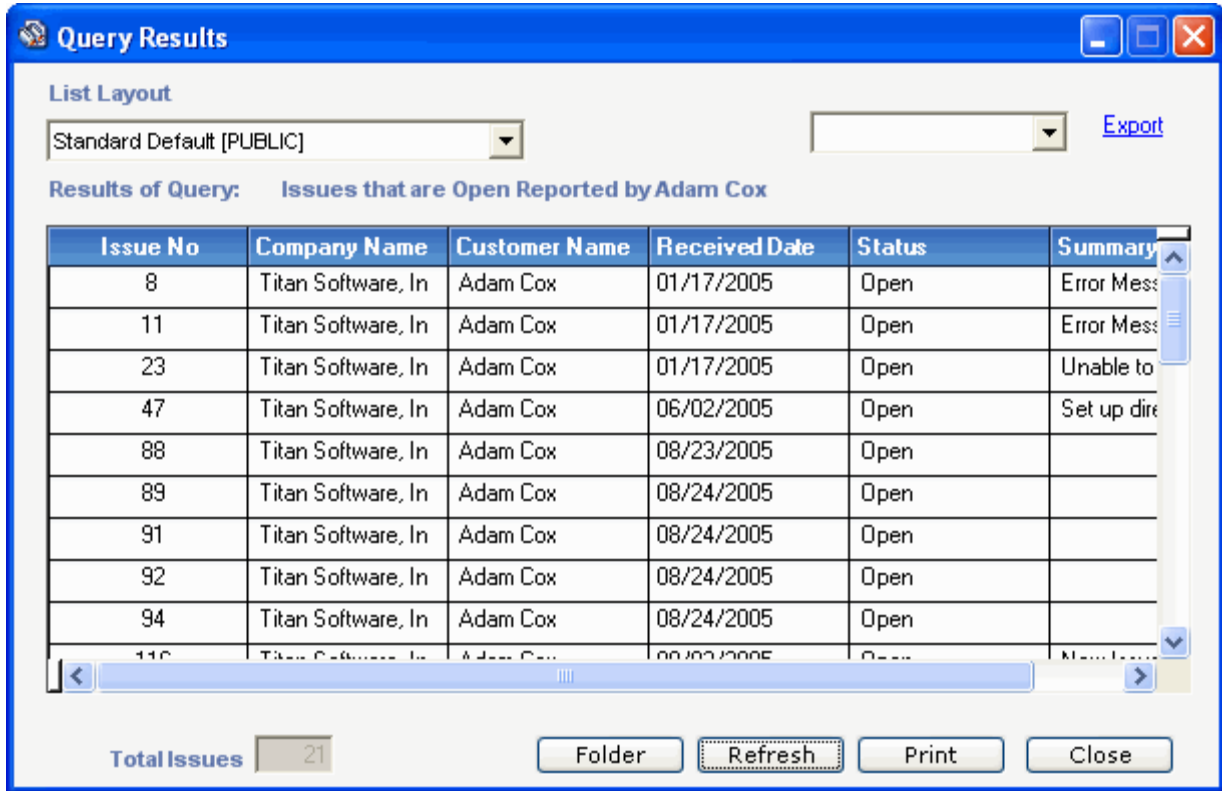
Simply click on the Query that you want to run. *Help Desk Authority* will display the results in the List Layout that is defined as the default format, as shown in the example below:



If you want to see the results displayed in another List Layout format, click on the **List Layout** drop-down menu. From this menu, you can choose any List Layout that has been defined as Public as well as all of your own Private List Layouts.

C6.1 Query Results

As discussed earlier, after a Query is run, the results are displayed in the format you have selected. A sample Query Results window is shown below:

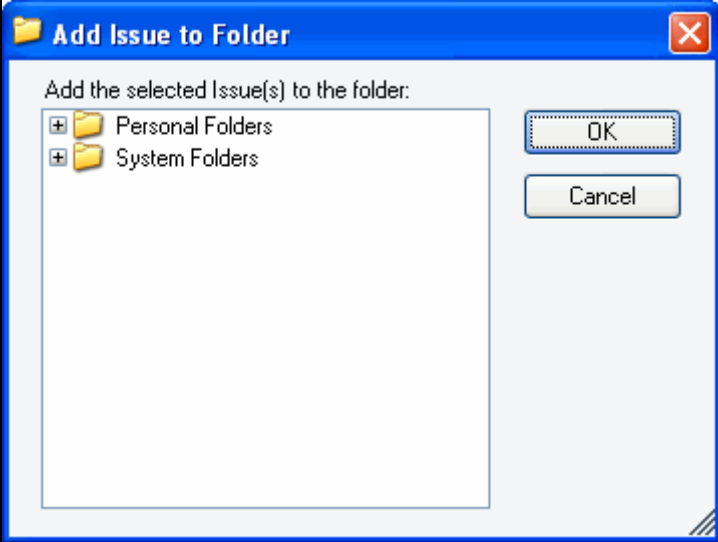


Each row in the table displays a separate Issue. If you double-click on any of the Issues, *Help Desk Authority* will take you directly to the actual Issue record.

If you would like to export the Query results, you can do so in Excel, CSV, or HTML format. Click on the Export drop-down menu and choose the format you want. Then click on the **Export** link. *Help Desk Authority* will export the Query results to the chosen format, as shown in the HTML example below:


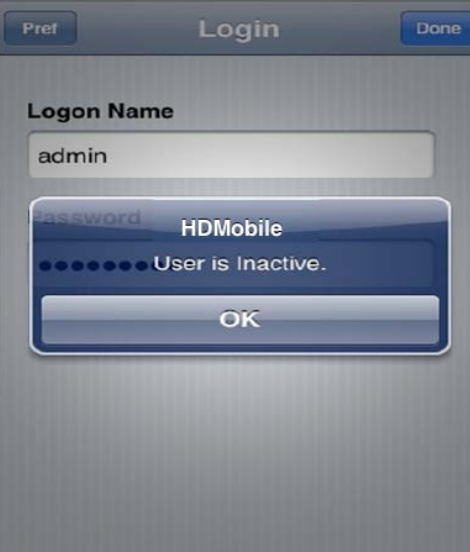
Issue No	Company Name	Customer Name	Received Date	Status	Summary
8	Titan Software, Inc.	Adam Cox	1/17/2005 3:57:59 AM	Open	Error Message
11	Titan Software, Inc.	Adam Cox	1/17/2005 4:10:06 AM	Open	Error Message
23	Titan Software, Inc.	Adam Cox	1/17/2005 4:27:11 AM	Open	Unable to delete files.
47	Titan Software, Inc.	Adam Cox	6/2/2005 12:47:58 PM	Open	Set up directory for file attachments.
88	Titan Software, Inc.	Adam Cox	8/23/2005 2:58:39 PM	Open	
89	Titan Software, Inc.	Adam Cox	8/24/2005 8:21:26 AM	Open	
91	Titan Software, Inc.	Adam Cox	8/24/2005 8:57:18 AM	Open	
92	Titan Software, Inc.	Adam Cox	8/24/2005 9:01:05 AM	Open	
94	Titan Software, Inc.	Adam Cox	8/24/2005 9:18:12 AM	Open	
116	Titan Software, Inc.	Adam Cox	9/2/2005 1:34:24 PM	Open	New Issue
117	Titan Software, Inc.	Adam Cox	9/2/2005 1:36:06 PM	Open	This is a new issue.
118	Titan Software, Inc.	Adam Cox	9/2/2005 1:37:01 PM	Open	This is the second new issue.
119	Titan Software, Inc.	Adam Cox	9/2/2005 1:37:35 PM	Open	This is the second issue.
120	Titan Software, Inc.	Adam Cox	9/2/2005 1:38:46 PM	Open	
128	Titan Software, Inc.	Adam Cox	9/6/2005 11:43:46 AM	Open	
100	Titan Software, Inc.	Adam Cox	8/26/2005 9:55:46 AM	Open	
102	Titan Software, Inc.	Adam Cox	8/29/2005 2:54:42 AM	Open	
104	Titan Software, Inc.	Adam Cox	8/29/2005 3:29:42 AM	Open	Unable to Delete Attachment Files
189	Titan Software, Inc.	Adam Cox	10/26/2005 8:58:17 AM	Open	
194	Titan Software, Inc.	Adam Cox	11/1/2005 11:40:38 AM	Open	
196	Titan Software, Inc.	Adam Cox	11/1/2005 1:08:39 PM	Open	Test Issue for A. Cox

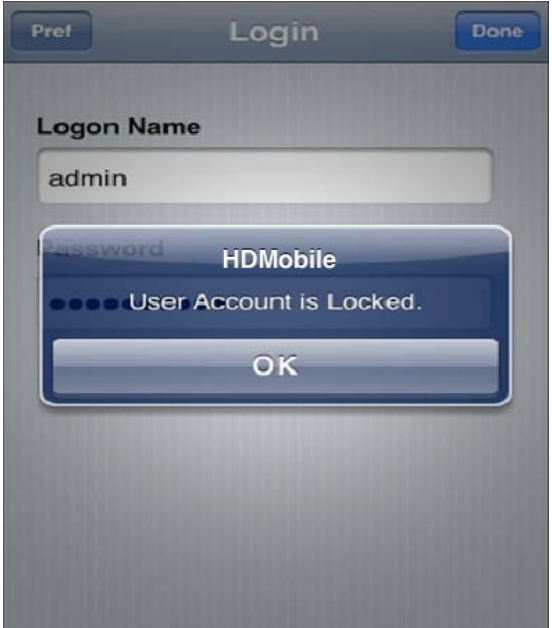

From the Query Results window, you can also perform any of the following functions.

Click On	To
Add To Folder	<p>File the selected Issue in an Issue Folder. Click on the Issue in the Query Results table to select it. Then, click on Folder. <i>Help Desk Authority</i> will display the Add Issue to Folder window, shown below:</p>  <p>From here, you can select a Folder in which to file the Issue.</p>
Refresh	Re-execute the Query to include any new Issues that have been opened or any updates to existing Issues.
Print	Print a hard copy of the Query Results.
Close	Exit the Query Results window.

Appendix D: Common Login Issues

HDAuthority has different access rights, and depending upon the rights given, you are allowed to access certain *HDAuthority* features and not others. While working on *HDAuthority*, you may encounter the following credential validation messages.

Options	Description	Image of Pick List
<p>Invalid Credentials</p>	<p>If your credentials are not valid when you attempt to login the message shown will be displayed.</p> <p>This message specifies that your logon credentials are not valid to access HDMobile.</p> <p>Please contact the <i>Help Desk Authority Administrator</i></p>	 <p>The screenshot shows an iPhone interface with a 'Login' screen. The 'Logon Name' field contains 'tbarnes'. A modal dialog box is displayed over the password field with the title 'HDMobile' and the message 'Login Failure: Unknown username or incorrect password'. An 'OK' button is visible at the bottom of the dialog. The background shows a standard QWERTY keyboard.</p>
<p>Valid Credentials but inactive User Account</p>	<p>If your user account is inactive when you attempt to login the message shown will be displayed.</p> <p>Please contact the <i>Help Desk Authority Administrator</i>.</p>	 <p>The screenshot shows the same iPhone login interface. The 'Logon Name' field contains 'admin'. A modal dialog box is displayed with the title 'HDMobile' and the message 'User is Inactive.'. An 'OK' button is visible at the bottom of the dialog.</p>

<p>Valid Credentials but locked User Account</p>	<p>If your user account is locked when you attempt to login the message shown will be displayed.</p> <p>Please contact the <i>Help Desk Authority</i> Administrator.</p>	 <p>The screenshot shows the HDMobile login interface. At the top, there are 'Pref' and 'Done' buttons. Below them is the title 'Login'. There are two input fields: 'Logon Name' containing 'admin' and 'Password' containing 'HDMobile'. A blue dialog box is overlaid on the screen with the title 'HDMobile' and the message 'User Account is Locked.' with an 'OK' button.</p>
<p>Valid credentials but Active-directory user</p>	<p>If you attempt to login with your Active Directory credentials the message shown will be displayed.</p> <p>HDMobile does not currently support access using Active-Directory login credentials.</p>	 <p>The screenshot shows the HDMobile login interface. At the top, there are 'Pref' and 'Done' buttons. Below them is the title 'Login'. There are two input fields: 'Logon Name' containing 'ssabina' and 'Password' containing 'HDMobile'. A blue dialog box is overlaid on the screen with the title 'HDMobile' and the message 'Failed to connect to HDMobile iPhone Web Service. Please check your Web Service URL. If the problem persists then Please contact HDMobile Technical Support.' with an 'OK' button.</p>