Action Request System™
Getting Started Guide and
Sample Schemas

Please
Recycle

Adobe PostScript

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Preface

Audience

This guide is intended for new users and administrators of the Action Request System (AR System). It provides online demonstrations showing the AR System in two sample help desk environments — Windows and UNIX. It also provides information about the sample schemas provided with the AR System.

This guide assumes that you are familiar with the operating environment of the platform on which you are running the AR System client tools. If you are installing the AR System NT server software, you should be familiar with the Windows NT environment.

Overview of this Document

Chapter 1, If You Are New to the AR System, provides information to allow you to get started with the AR System. It also provides an overview of the quick installation for first-time users. Finally, it provides a table of common topics to enable you to quickly find the specific information you need in the documentation. If this is the first time you have installed or used the AR System, we recommend that you read this chapter before you proceed to other chapters in this guide or the *Action Request System Installation Guide*.

Chapter 2, Help Desk Demonstration for Windows and
Chapter 3, Help Desk Demonstration for UNIX, feature live use of the AR System Server and Tools. They will help you to familiarize yourself with the operation of the AR System on your platform. You follow a detailed script to

track a problem from initial submission to closure, learning about the design and functionality of the AR System along the way. Additionally, you will learn how to use the Administrator Tool to customize applications.

Chapter 4, Help Desk Demonstration and Sample Schemas, introduces the AR System objects that comprise the demonstration environment. In addition, an overview of the sample schemas that are shipped with the AR System is provided.

AR System Documents

The ***Action Request System Getting Started Guide and Sample Schemas*** provides an online demonstration showing the use of the AR System in a sample help desk environment and describes how you can use the sample schemas provided with the AR System.

The ***Action Request System Installation Guide*** describes how to install and license the AR System software. There are separate Installation Guides for UNIX and Windows NT environments.

The ***Action Request System User's Guide*** is a how-to description of the operations performed by all users of the AR System. There are separate *User's Guides* for environments supporting the Motif, Macintosh, and Windows graphical user interfaces (GUIs) and for ASCII terminals.

The ***Action Request System Administrator's Guide*** describes how the AR System administrator can use the Administrator and Import Tools to set up the AR System and define its local operations. This manual is also a reference for advanced AR System concepts. There are separate *Administrator's Guides* for the UNIX and Windows environments.

The ***Action Request System Programmer's Guide*** is a reference guide for programming with the application programming interfaces (APIs) that come with the AR System.

The ***Action Request System Troubleshooting and Error Messages Guide*** provides information to help you identify and solve problems with the AR System.

The ***Action Request System Distributed Server Option Administrator's Guide*** provides information about operating the AR System in a distributed, multi-server environment.

The ***ARWeb Administrator's Guide*** provides details about installing, using, and customizing the ARWeb application so that you can provide access to your company's AR System applications through the World-Wide Web.

The ***Action Request System Help Desk Template Guide*** describes the help desk application that runs in conjunction with the AR System to help you manage your internal help desk organization.

Conventions Used in this Manual

bold font

Indicates that a word is a new or important term.

Example: **filters**.

Initial Caps

Button and menu names and items have the first letter capitalized.

Example: File.

`computer font`

Indicates computer output, including UNIX prompts, an explicit directory, or a file name.

Example: `prompt%.`

Indicates data to be entered by the user.

Example: `aruser &.`

<italic font in angle brackets>

Indicates a variable directory, file name, or string that you replace with an appropriate directory, file name, or string.

Example: <*ar_config_dir*>.

italics

Indicates a reference to another manual or to a different section within the current manual.

Example: see *AR System Documents.*

Italic type is also used for emphasis.

Example: *All* users will be affected.

If You Are New to the AR System 1 ≡

This chapter provides the following information:

- Overview of the AR System and the *Getting Started Guide*

- A quick tour of the AR System

- Common tasks

Overview

This section provides an overview of both the Action Request System (AR System) and the *Getting Started Guide and Sample Schemas* manual.

The Action Request System

The AR System is an adaptable client-server application that works with your database to track and organize both data and processes. The system administrator creates schemas which automate much of the workflow, and make data entry, retrieval, and tracking quick and efficient.

Adaptability

As an AR System administrator, you may customize the AR System to suit your particular needs. You set the criteria for the workflow engine. For example, you may decide that workflow should be designed around the skills of your personnel or the nature of the issues, among other criteria.

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As an AR System administrator, you may choose to control AR System processes based on events (filters) and on time (escalations). For instance, you could have the AR System automatically send a message to a technician whenever the technician has been assigned an issue (filter), and if the technician does not respond within a set period of time, have the AR System re-route the issue to an available technician (escalation).

Both AR System administrators and end users may customize their views of particular schemas. This allows personnel with diverse tasks to organize their data in the most suitable manner.

Components

The sections below describe some of the more frequently used terms and concepts of the AR System.

Schemas

The information fields in the AR System databases are described in **schemas**. Each schema represents a view of a database on the AR System server. The AR System comes with several sample schemas in addition to the demonstration schemas, and the administrator can build additional schemas as needed.

When the AR System administrator defines a schema, the administrator sets up the fields on the schema and determines what kind of information users will enter in each field. The administrator may also create menus and help text to help users submit tickets. The demonstration schemas are described in Chapter 4, Help Desk Demonstration and Sample Schemas.

The demonstration uses schemas to implement the following features:

- Record information about a problem needing attention from the Help Desk staff

- Research the problem, log work completed, and notify the end user of the solution

Menus

The AR System administrator can define **character menus** that can be attached to any character field on any schema on the server. Menus attached to character fields are used to allow users to select a value from a set of values.

As an end user, you will use menus in the demonstration to search for a resolution to the current problem. As a backline staff member, you will add data to an existing menu, providing end users with a more complete self-help tool.

The demonstration uses menus to implement the following features:

- Categorize problems on a multi-tiered basis
- Assign calls to available and appropriate technicians

Filters

A **filter** is a mechanism that executes on the server, and causes a specific set of actions to be performed when a specific set of qualifying conditions are met. In addition, filters help define the work rules for AR System users at your site.

The demonstration uses filters to implement the following features:

- Notify support technicians of call assignment
- Notify personnel of call escalations, or requests for call reassignment
- Notify callers when a problem is resolved
- Check work rules, such as parsing fields for valid data entry

Active Links

Active links define operations that are executed on the client machine when the user performs a specific action.

The demonstration uses active links to implement the following features:

- Retrieve caller information
- Retrieve similar calls

Escalations

Escalations test for items matching a set of conditions at a set time or interval and, if the conditions are met, one or more actions are taken. For example, you might create an escalation that executes when a ticket more than eight hours old has not yet been closed by support personnel.

In the demonstration, no escalations are used.

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The Guide

This document includes Help Desk demonstrations for Windows and UNIX systems. These demonstrations will take you through a step-by-step process, as an end user, frontline staff member, and backline technician use the AR System to resolve an open issue.

A Quick Tour of the AR System

You can follow the steps below to set up and become familiar with the Action Request System.

1. **Install your AR System Server and clients using the instructions provided for your platform in the *Action Request System Installation Guide.***
   If you wish, you can perform a quick installation, which allows you to use and evaluate the AR System without performing a complete installation. Instructions for this quick installation are provided in Chapter 1 of the *Action Request System Installation Guide* for your platform. This quick installation allows you to run the AR System without a license. However, you are limited to a maximum of approximately 50 records for each schema.

2. **You may see an example of a basic AR System application by running the Help Desk demonstration explained in this document. This demonstration follows the activities of three members of a Help Desk as they use the AR System.**
   When you have finished viewing the Help Desk demonstration, you may wish to rename the sample users and continue by establishing the setup of your own AR System. Renaming the sample users allows you to use the fixed licenses the sample users need in the Help Desk demonstration. Be sure to rename and provide a password for the Demo user, as this user has administrator access to the system.

3. **You may see a sample of a more sophisticated AR System application by installing and reviewing the AR System Help Desk Template, which is packaged apart from the AR System. See the *Help Desk Templates Guide for Users and Administrators* for the information needed to install and use the template.**

4. **If you are ready to activate your AR System licenses, follow the instructions provided in the *Action Request System Installation Guide.***

5. **When you are ready to customize the AR System to meet your particular application needs, you can activate users and groups of users, define your workflow, and adapt or define schemas in any way.** *Common Tasks* **on page -6 will aid you in finding the information you need to perform these tasks.**

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Common Tasks

Table 1-1   Common Tasks *(1 of 2)*

For Information About	Refer To
Running an AR System demonstration	*Getting Started Guide and Sample Schemas* Chapters 2 and 3
Licensing	*Action Request System Installation Guide* Chapter 8
Available sample schemas	*Getting Started Guide and Sample Schemas* Chapter 4
Running the AR System User and Notification Tool	*Action Request System User's Guide*
Solving problems	Action Request System Troubleshooting and Error Messages Guide
New features or known problems	Action Request System Release Notes
Running the AR System Administrator Tool	*Action Request System Administrator's Guide Chapters 1, 2, and 3*
Using the AR System Import Tool	Action Request System Administrator's Guide Chapter 14
Setting up groups and users	*Action Request System Administrator's Guide* Chapter 5
Designing your AR System implementation	*Action Request System Administrator's Guide Chapter 4*
Submitting an action request	*Action Request System User's Guide* Chapter 3
Modifying or printing an action request	*Action Request System User's Guide* Chapters 4 and 5
Defining schemas, fields, menus, filters, escalations, and active links	*Action Request System Administrator's Guide Chapters 6, 7, 8, 9, 10, 11, and 12*
Databases and database considerations	*Action Request System Installation Guide*
Setting up email support	*Action Request System Installation Guide*

Table 1-1   Common Tasks *(2 of 2)*

For Information About	Refer To
Using email in the AR System	*Action Request System Administrator's Guide Chapter 15 and Action Request System User's Guide Chapter 9*
Using the application programming interface (API)	Action Request System Programmer's Guide
Using the Help Desk Template	Action Request System Help Desk Template Guide

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Help Desk Demonstration for Windows 2 ≡

Once you have installed the AR System server and client tools, you are ready to experiment with the software. Your AR System package comes with two demonstrations to help you learn about the benefits, features, and functionality of Remedy's Action Request System, the leading help desk solution. The first demonstration is the self-running Action Request System Demo Disk. Use the demonstration diskette on any Windows PC or UNIX station to learn about the key benefits and uses of the AR System. Install and run the demo according to the instructions on the disk label.

The second demonstration is the Help Desk Demonstration, which is described in this chapter. It features live use of the AR System Server and Tools and is a great way to familiarize yourself with the operation of the AR System. You will follow a detailed script to track a problem from initial submission to closure, learning about the design and functionality of the AR System along the way. Additionally, you will learn how to use the Administrator Tool to customize applications. The complete demonstration consists of five sections and, if you are a first time user, takes about 45 minutes to complete.

By working through the demonstration, you will:

- See how a team works together and, with the aid of predefined, site-specific workflow rules, quickly resolves user requests for assistance.

- Learn the basics of how to use the AR System User, Notification and Administrator Tools.

- See ways to use the AR System to automate your business workflow.

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Introducing Joe, Francie, and Bob

This scenario introduces you to three people — Joe User, Francie Frontline, and Bob Backline. Joe, Francie and Bob represent three types of users who can take advantage of the AR System in a typical help desk environment.

During the course of this Help Desk demonstration, you will at some point assume the role of each user. Let's meet them now:

Joe User: Joe is an AR System end user. Running the AR System is not Joe's main job. In fact, Joe needs to run the AR System User Tool only when he has a problem with the hardware or software that he does use regularly. Joe can also run the AR System Notification Tool to ensure that he is notified when any problem he submits is fixed. Joe is experiencing problems connecting to Remedy Corporation's Home Page on the World Wide Web (WWW). He will submit a help desk ticket to get the problem resolved.

Francie Frontline: Francie is a first line support staff member. She typically submits calls and acts as a generalist for problem resolution at the company's internal help desk. In this role, she attempts to resolve each issue, and, if she is unable to do so, assigns incoming requests for help to the appropriate help desk staff member. She then follows up to make sure all problems are resolved in a reasonable period of time.

Bob Backline: Bob usually gets calls assigned to him from other support staff members. As a back line staff member, Bob is a specialist with a more narrow area of expertise than the front line staff. He resolves the call and updates information in the ticket.

Now it's time to start the Help Desk demonstration and have some fun. You will follow a single problem through a simple problem resolution process. In some cases, an Administrator's Note outlines the workflow process used to create the actions you see happening in the demonstration.

1. Submit new problem.

3. Fix problem.

2. Analyze and possibly reassign problem.

The demonstration script will guide you through the keystrokes you need to make to complete each step.

Note – In a real work environment, each of these users would be running their AR System tools on separate machines. In this demonstration, you will simulate the use of three separate machines by logging in to your AR System tools alternately as three different users.

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An Internal User Submits a Ticket

The Computing Services Group recently installed two new pieces of software on Joe User's computer: the Remedy Action Request System User Tool and Web Wanderer, a WWW browser. Joe is very interested in accessing information from the WWW and attempts to locate the Remedy Corporation home page at `http://www.remedy.com`.

While the Web browser itself seems to function properly, Joe's browser displays an error message when he tries to access the Remedy home page. Anxious to get beyond the error, Joe proceeds to use his other new software tool, the AR System User Tool, to initiate a service request with his internal help desk. The help desk trainer has told Joe that the AR System User Tool is like dialing 911, with calls going directly to the help desk. Joe decides to make his call to the help desk using the new tool.

Log In to the DemoHelpDesk Schema

In this section, you will log in to the User Tool as Joe User, and select the DemoHelpDesk schema. A **schema** is a form that represents a set of related data in the AR System database. The DemoHelpDesk schema is designed to be used for service requests.

To log in and select the DemoHelpDesk schema:

1. Open the AR System User Tool by double-clicking the AR User icon in the Remedy AR System program group.
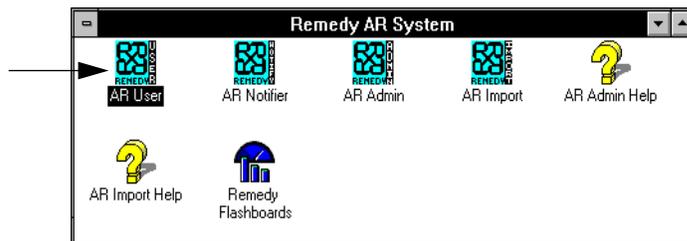
Figure 2-1   Remedy AR System Program Group

2. Choose Login from the File menu. The Login dialog box appears.
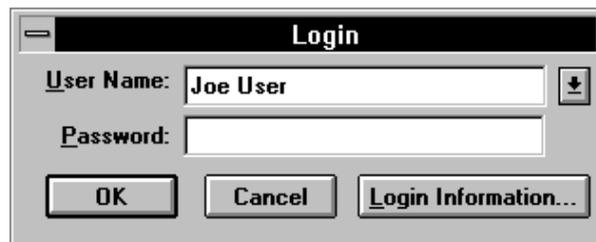
Figure 2-2   Login Dialog Box

3. **Type** `Joe User` **in the User Name field. Remember, capitalization and spaces count. Leave the Password field empty. Click the OK button.**

4. **Choose Open Submit from the File menu. The Select Schema - Submit dialog box appears, as shown in Figure 2-3. This dialog box lists the schemas a user can submit.**
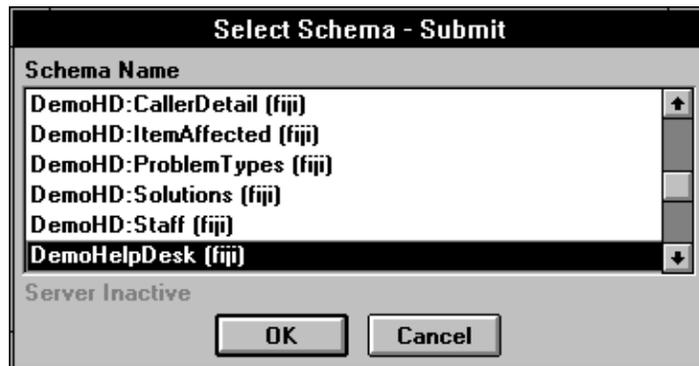
Figure 2-3   Select Schema - Submit Dialog Box

5. Select the DemoHelpDesk schema and click the OK button. a DemoHelpDesk schema submit window appears, and should look similar to Figure 2-4:

Figure 2-4   End User View of the DemoHelpDesk Schema

You have successfully logged in to the AR System as Joe User, and selected the schema used for entering problems. Next, you will fill in the information regarding the problem Joe is having.

Provide Information About the Request

Joe needs to provide information to the help desk staff about the problem he is encountering. Typically, a user such as Joe provides the help desk with details about himself, as well as the problem.

To fill the DemoHelpDesk ticket with pertinent information:

1. **In the Employee Id field, type** `3000` **and press Enter.**
    Since Joe User has contacted the help desk in the past, his caller record
    exists and information about him is on file. When you press Enter, notice
    Joe's first and last name are automatically filled in.

Figure 2-5   DemoHelpDesk Schema with Auto-Filled Data

Note – The auto-fill capability demonstrated here is achieved by an **active link**.
The active link takes the employee number as query criteria, queries the
DemoHD:CallerDetail schema for a match, and returns the data.

2. **Locate the Problem Type field. Click the character menu icon** and
    select Software from the menu.

3. **Locate the Item Affected field. Click the character menu icon to the right**
    of the field, then choose Web Browser.
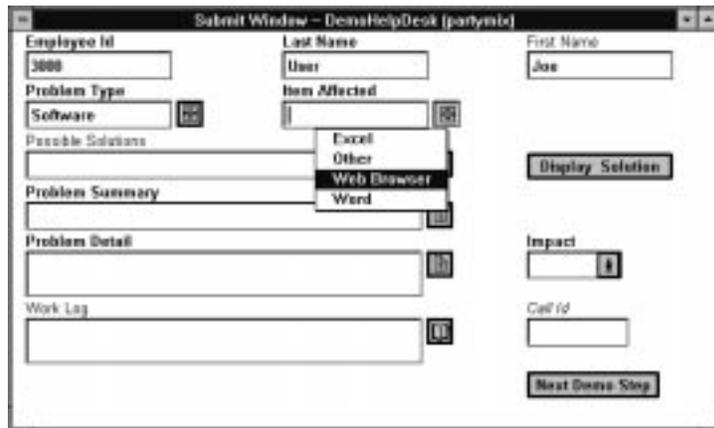
Figure 2-6   Query Menu on the DemoHelpDesk Schema

Notice that all selections in the Item Affected field menu are related to software. This information is taken from the previous selection made in the Problem Type field.

Note – The values of the Item Affected fields are provided by a **query style menu**, which takes the criteria to match from the Problem Type field. It then queries the DemoHD:ItemAffected schema to find all entries related to a Problem Type definition of Software.

End User Searches for the Solution

Joe has the ability to check the solutions database to see if a similar problem was reported in the past, and what the resolution might be.

To search the Solutions database from the DemoHelpDesk schema:

1. In the Possible Solutions field, click the character menu icon.
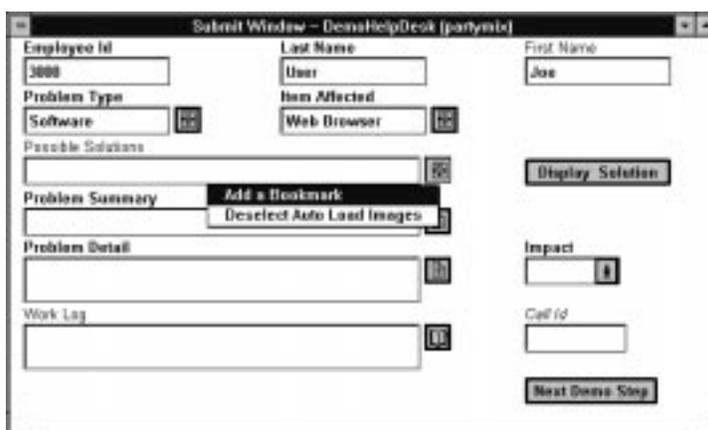
Figure 2-7   Possible Solutions Displayed on DemoHelpDesk

The AR System shows all known solutions matching the contents of the
Problem Type and Item Affected fields. Joe reviews these solutions, and
realizes none apply to the problem he is encountering.

Note – The ability to search the possible solutions database is achieved with a
query style menu. This menu queries the DemoHD:Solutions schema for all
entries with matching values for the Problem Type and Item Affected fields.

2. **Since none of the possible solutions are appropriate, click in the schema
   window to dismiss the menu selections.**

3. **In the Problem Summary field, type: `Cannot access Remedy home page.`**

4. **Click the text editor icon**   **to the right of the Problem Detail field.**

Click in the Problem Detail text editor that opens, then type: `Using Web
Wanderer 2.1 for Windows. Error message: fatal error 500, can't
access document.`

Figure 2-8   Problem Detail Text Field in the DemoHelpDesk Schema

5. Click the OK button to close the text editor.

6. In the Work Log, type in the following text:
```
Did not see a logical solution in Possible Solutions list.
Please analyze.
```

7. Click the Impact selection field. Choose Medium.

Submit the Request to the Help Desk Staff

Once Joe has finished filling in the necessary information and submitted the ticket, the help desk staff will help him resolve his problem.

To submit the ticket to the database:

You have entered all data needed for problem submission. Now submit the ticket.

The Call ID field will fill in automatically when you submit the ticket.

1. **Choose Apply from the Actions menu to submit the request. When you submit the ticket, notice that a message is displayed on your screen, as shown in Figure 2-9.**
   You can also use the Apply button [icon] on the tool bar to submit your ticket.
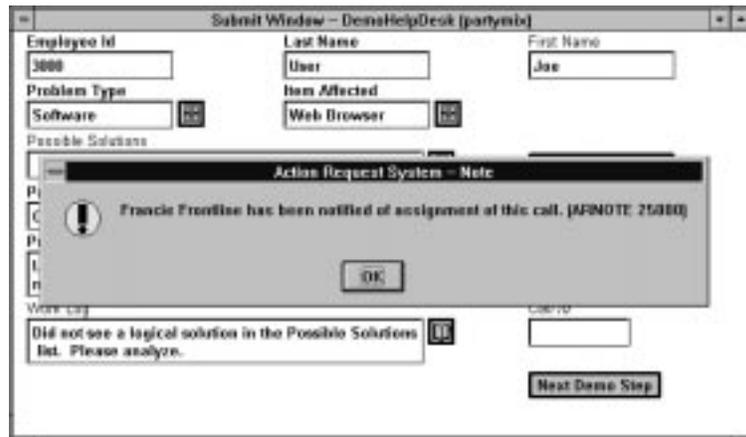
Figure 2-9   Notification of Assignment

Note – The message is achieved with a **filter**. This filter has two actions. The first displays a message to the submitter, letting Joe know the ticket is assigned to Francie. The second action notifies the assignee of the new ticket.

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2. **Click the OK button to dismiss the message.**
   In the lower portion of the window, you see the text:

`Submit Successful-ID=`*xxxxxx*

   where *xxxxxx* is a number representing Joe's ticket ID. He can refer to this ticket number when contacting the help desk regarding this request.

3. **Click the Next Demo Step button to prepare the User Tool for the next section.**

4. **Close the Submit window by double-clicking the control box in the upper-left corner of the window.**

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Section Conclusion

You have successfully submitted a call. So far, you've learned the following:

- End user participation is encouraged with the AR System. End users commonly submit their own requests, and even perform self help. Help desk staff can focus their efforts on resolving requests, while end user satisfaction is enhanced through participation.

- Some fields require data entry, while others can be automatically filled out by the system. Menu selections simplify data entry even further.

- The AR System can route tickets automatically to the appropriate staff members, and notify them using the Notification Tool. The Notification Tool is explained in greater detail later in the demonstration

- End users have a simple view of the help desk application, making data entry quick and easy. Users can be successful with minimal training.

Frontline Technician Works on the Submitted Call

Now that you have entered a new call as Joe User, you will assume the role of Francie Frontline, a help desk technician, and bring the call to resolution. As you saw in the previous section, Francie Frontline has been assigned Joe's call. This assignment was made by the system and was based on a defined business rule: Assign all software problems to Francie Frontline. The Action Request System allows you to simply define and change business rules for processing any request. In this lesson, you will see how the help desk responds to the call.

Assume the Role of the Front Line Staff Member

Log in as Francie Frontline to see what workflow changes are designed for frontline users.

To log in to the DemoHelpDesk Schema as Francie Frontline:

1. **Choose Login from the File menu. The Login dialog box appears.**

2. **Type `Francie Frontline` in the User Name field. Leave the password blank. Click the OK button.**

3. From the File menu, choose Open Query. The Select Schema - Query dialog box appears, as shown in Figure 2-10.
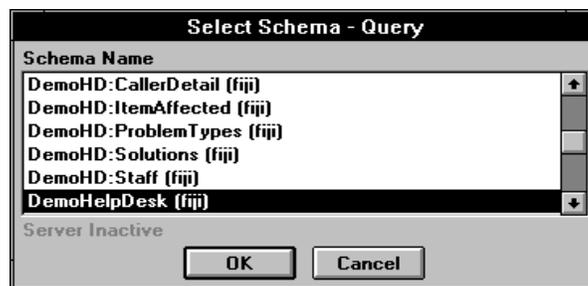
Figure 2-10 Select Schema - Query Dialog Box

4. Choose DemoHelpDesk from the list and click the OK button. The DemoHelpDesk schema appears, and should look similar to Figure 2-11:
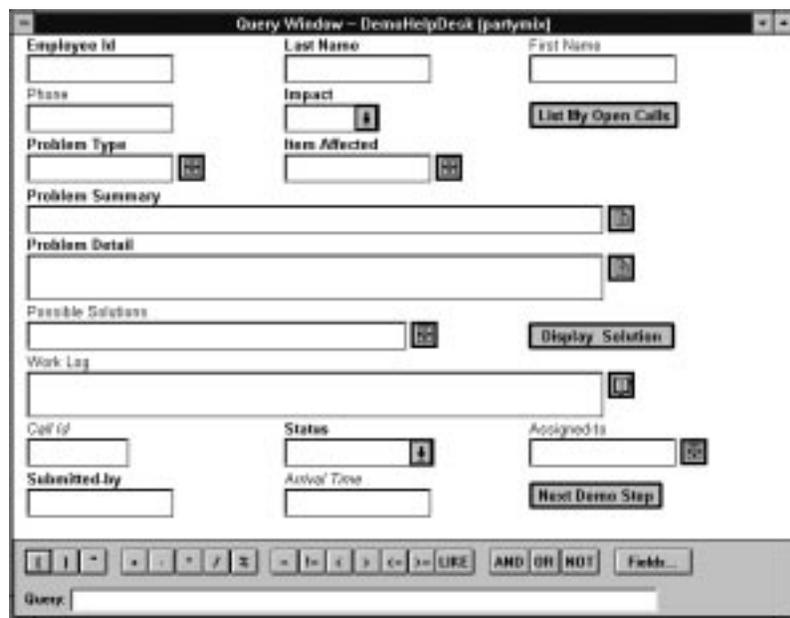
Figure 2-11 Francie Frontline's View of the DemoHelpDesk Schema

You have just opened a Query window containing the DemoHelpDesk schema. Query windows are used primarily by users who will be searching the database, and making modifications.

Notice that Francie's view of the DemoHelpDesk schema is different. It is optimized for front line help desk personnel. Francie's view includes buttons, as well as new fields like Phone, Submitted-by, Arrival Time, and Status. Francie needs this additional information to resolve tickets.

Front Line Technician Examines Call Queue

Francie needs to determine her workload. She can browse through the DemoHelpDesk entries and search for the tickets assigned to her, but in this case some workflow has been created to make the task easier.

To get the details of the newly assigned call:

1. **On the DemoHelpDesk schema, click in the button labeled List My Open Calls. This performs a query of DemoHelpDesk tickets and lists the calls in Francie's work queue, as shown in Figure 2-12.**

Figure 2-12   All Tickets Currently Assigned to Francie Frontline

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Note – The List My Open Calls button is an **active link** that queries all entries in the DemoHelpDesk schema with Francie Frontline in the Assigned-to field and a Status other than closed.

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2. **Double-click the entry displaying the words "Cannot access Remedy home page." Joe User's ticket is displayed in Modify Individual mode, allowing Francie to modify portions of the ticket.**

3. **Review the information in the ticket by clicking the book icon to the right of the Work Log field.**
   Notice the icon is a book with writing on the pages, indicating data has been entered in this diary. Notice also Joe User's previous entry describing the step he has already taken. It has been stamped with his user name, and the time the entry was made.

   Upon review, Francie sees that Joe could not find an appropriate solution in the solutions database.

4. **Click Cancel to close the Work Log dialog box.**

5. **Close the Query List by double-clicking the control box in the upper-left corner of the window.**

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Front Line Queries DemoHelpDesk Database for Resolution

Francie decides to query the DemoHelpDesk database for closed calls fitting this problem type. Perhaps a ticket similar to this has been resolved in the past, and she can use that information in this instance. The search Joe performed earlier was against the Solutions database. Francie will search the HelpDesk database to see if a solution has been found but not submitted to the Solutions database.

Several times in this demonstration, you have automated queries through the use of active links in menu selections and buttons. As Francie, you will now perform a query-by-example to generate a query for a solution. You will use this method to see a list of closed DemoHelpDesk tickets with a Problem Type of Software and Item Affected of Web Browser.

To use the database to find possible solutions:

1. **Choose Query Window from the Window menu option. This brings a blank Query Window to the front.**

2. **From the menu in the Problem Type field, choose Software.**

3. **From the menu in the Item Affected field, choose Web Browser.**

4. **From the menu in the Status field, choose Closed.**

5. From the Query menu, select List. Or, use the toolbar button.
A list of all closed calls with matching criteria appears. In browsing the
entries returned, you see there is no entry specific to the issue Joe User is
reporting.
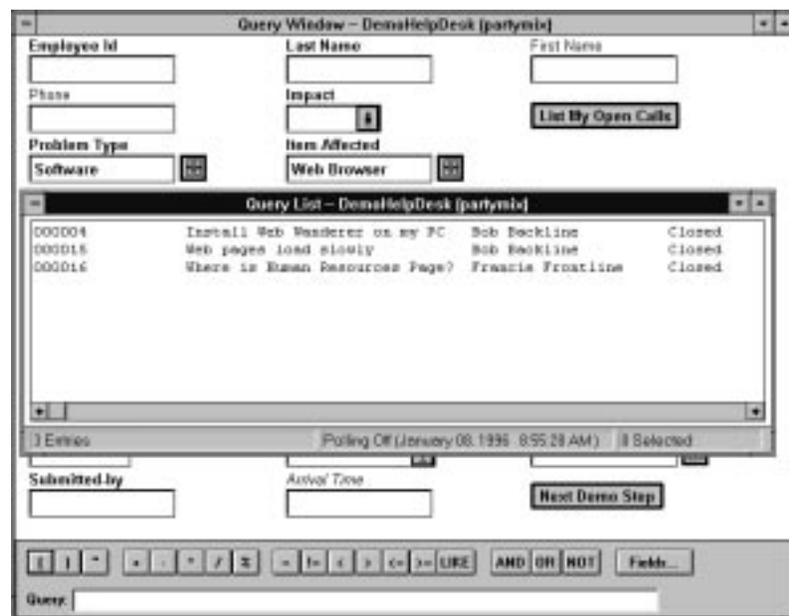
Figure 2-13   Query-by-Example Results

**6. Close the Query List window by double-clicking the control box in the
upper-left corner of the window.**
In this case, you viewed the query results in the list format. You could also
have chosen to view matching tickets in report or display format. In display
format, all fields in the ticket are displayed in read-only mode. Report
format offers output options including screen, file or printer.

7. From the Window menu, choose Modify Individual-DemoHelpDesk.
This brings Joe User's ticket back to the foreground.

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Front Line Reassigns Ticket to a More Experienced Staff Member

Francie needs to enter information about the steps taken so far, and reassign the call to a more experienced help desk staff member. She will begin by making an entry in the Work Log field. The Work Log is a diary field that keeps a running record of actions taken on the ticket.

To enter work data and reassign the ticket:

1. **Make an entry into the Work Log by clicking the book icon to the right of the Work Log field.**

Type the following text in the Editor box:

```
No solution in the solutions schema or DemoHelpDesk database.
Bob, weren't you able to access the Remedy home page last week?
Please look in to this request.
```


Figure 2-14 The Work Log Diary

2. **Click the OK button to close the Work Log data entry box.**

3. **Assign the call to Francie's colleague, Bob Backline, who has more experience with Web Browsers.**
Click the menu icon to the right of the Assigned-to field, and select Bob Backline.

Figure 2-15   Francie Reassigns the Ticket

4. **Choose Apply from the Actions menu, to apply the changes to the request. Note the message that is displayed on your screen.**

5. **Click the OK button to dismiss the message.**

6. **Close the Modify Individual window by double-clicking the control box in the upper-left corner of the window.**

7. **Check Francie's queue again by clicking the List My Open Calls button. Notice that Joe User's call is no longer in her queue, allowing Francie to proceed to other tickets.**
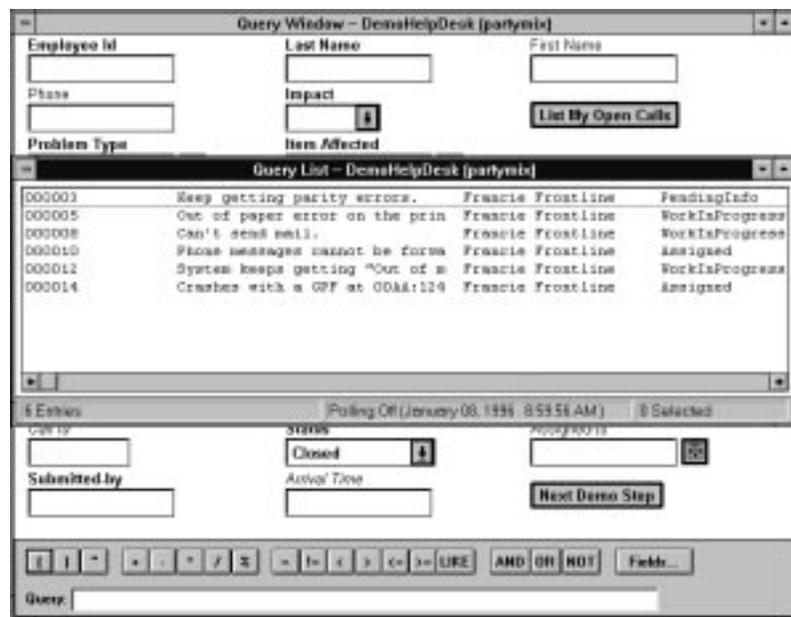
Figure 2-16   Francie Re-checks her Tickets

8. **Close the Query List by double-clicking the control box in the upper-left corner of the window.**

9. **Click the Next Demo Step button to prepare the User Tool for the next section.**

10. **Close the Query window by double-clicking the control box in the upper-left corner of the window.**

11. **From the File menu, choose Login. The Login dialog box appears.**

12. **Type `Bob Backline` in the User Name field, and leave the password blank. Click OK.**

13. **Minimize the User Tool by clicking the down arrow in the top-right corner of the window.**

Section Conclusion

Now you have seen how help desk staff can use the capabilities of the AR System to work on a call. In this section, you have learned that:

- The frontline technician has a different view of the help desk application. Much as the user view is optimized for quick and easy submission by occasional users, the frontline view is optimized for nearly full time use by frontline technicians to manage their work queues and to resolve calls quickly.

- Common steps used by help desk personnel can be automated as part of the schema view. Automation can be driven through menu selections, buttons and applying changes to the database. Automation provided the frontline technician with information on open calls and possible solutions.

- A solution schema is a primary aid for help desk personnel to quickly resolve calls. You can build solution schemas to include common problems at your site.

Backline Technician is Notified of a Ticket

In this section you will assume the role of Bob Backline, the backline technician, and begin with a different tool — the Action Request System Notification Tool. The Notification Tool works like a desktop pager to alert help desk staff members of any requests that require their attention.

Backline Technician Retrieves the Ticket in the Notification Tool

Bob sees that a call has been assigned to him via the Notification Tool. Bob retrieves the notification and reviews the call in the User Tool.

To retrieve the DemoHelpDesk ticket in the Notification Tool:
- Double-click the AR Notifier icon in the Remedy AR System program group to launch the AR System Notification Tool.
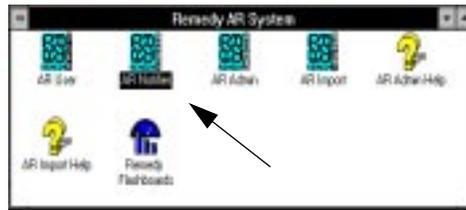
Figure 2-17   Notification Icon in the Remedy AR System Program Group

A message appears in the Notification Tool to inform Bob that he has been assigned a new Medium Priority call.

Figure 2-18   Notification of Assignment

To customize the Notification Tool to set User Tool retrieval preferences:

1. **Choose Preferences from the File menu. The Notification Tool Preferences dialog box appears, as shown in Figure 2-19.**

2. **Select Modify in the Action for Get Details box, then click the OK button.**
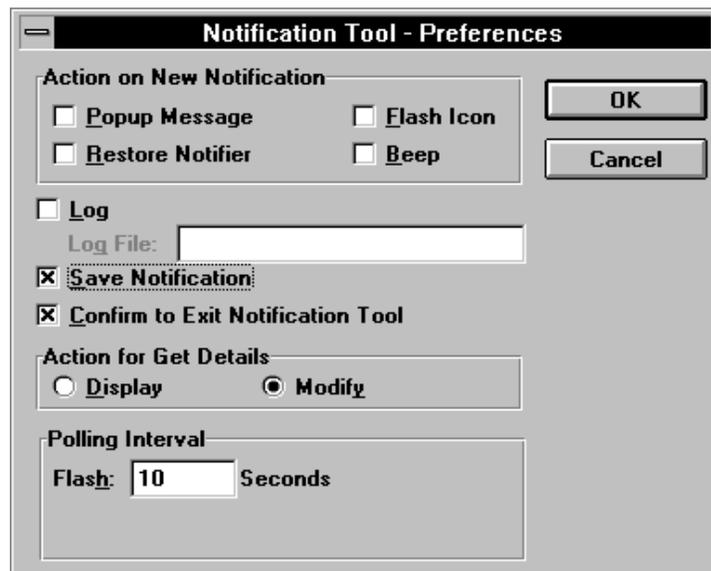
Figure 2-19 Notification Tool Preference Window with Get Details Action Specified

To get details of a DemoHelpDesk ticket notification:

- Double-click the entry in the Notification Tool to open the associated ticket. With this action, you open the AR System User Tool, and open the DemoHelpDesk ticket in Modify mode. This makes it possible for you to add information to the ticket as soon as you receive it.
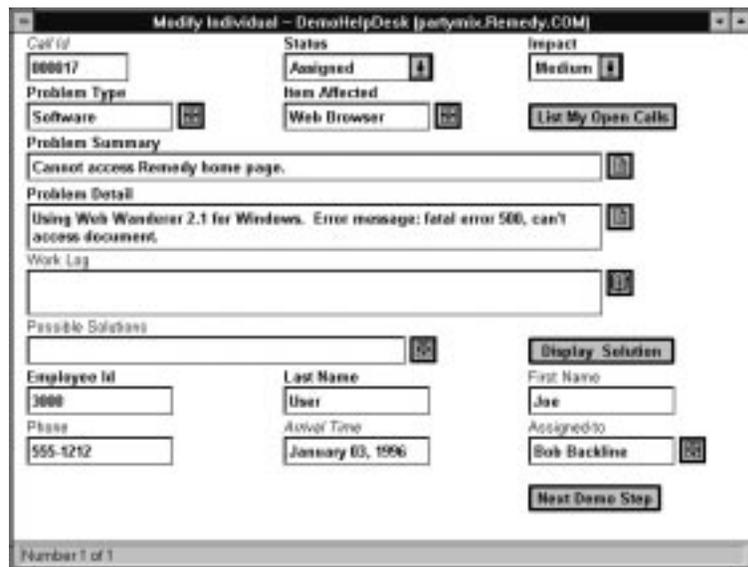
Figure 2-20 Get Details in a Modify Individual Window

In this part of the demonstration, you have learned that:

- The Notification Tool is like a desktop pager, alerting you of issues that require your attention.

- Notification is driven by business rules specified by your system administrator. These rules can be changed to meet your specific needs through the AR System Administrator Tool, discussed later in this chapter.

- The AR System Notification and User Tools are linked. Double-clicking an entry in the Notification Tool opens the User Tool and displays the details of your call.

Backline Technician Resolves the Call

Drawing from his experience with Web Wanderer, Bob is able to recommend a solution to Joe's request. Bob will provide a solution by outlining the steps Joe can take to access Remedy's Home Page, and will then close the call. In addition, Bob's actions are stored in the AR System for others to use as a solution in the future.

While reviewing the ticket, notice that you are now displaying a third view that is optimized for back line staff members. Problem description and problem resolution information is emphasized at the top of this view, while contact information is de-emphasized.

To review the call and provide the resolution:

1. **Review the Problem Type, Item Affected and Problem Summary fields.**
   In reviewing this information, Bob realizes Joe needs to define the proxy information for his Web Wanderer configuration.

2. **Click the book icon to the right of the Work Log field, and enter the solution details in the editor box:**

   `Select proxies under Web Wanderer's options menu.`

   `Find the line for http protocol.`

   `Set the proxy server to "firestorm".`

   `Set the proxy port to "80".`

3. **Click the OK button to close the Work Log field data entry box.**
   Bob now contacts Joe and they review the steps outlined in the Work Log. Upon completing these steps, Joe is able to access Remedy Corporation's home page on the World Wide Web.

4. **Click the Possible Solutions field and type:**

   `Specify a proxy server and a proxy port.`

   This displays a short summary of the actions detailed in the Work Log field. This information can be used for end users to research problem resolutions.

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Backline Technician Closes the Call

To close the call:

1. **In the Status field, change the Status to Closed.**

2. **Choose Apply from the Actions menu to apply the changes to the ticket. You can also click the Apply button on the toolbar. Notice the notification message displayed on your screen.**
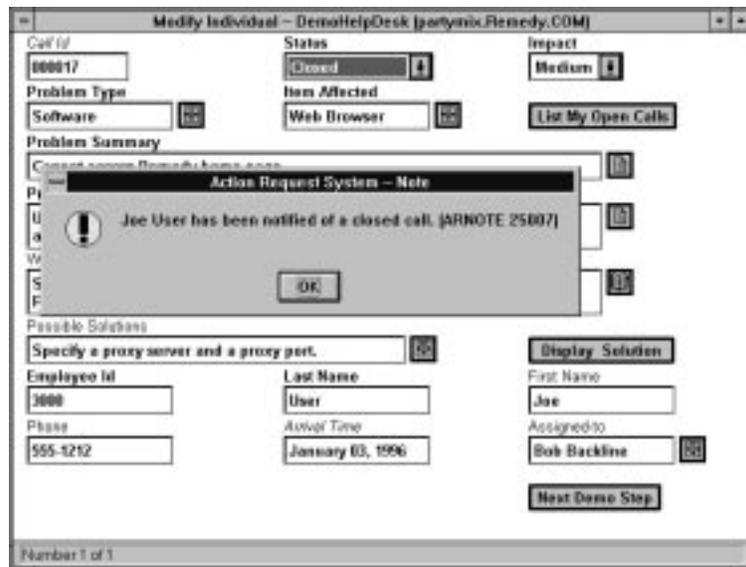
Figure 2-21   Notification of Closed Call

3. **Click the OK button to dismiss the message.**

4. **Click the Next Demo Step button to prepare the User Tool for the next section.**

5. **Close the Modify Individual window by double-clicking the control box in the upper-left corner of the window.**

6. **Minimize the User Tool and the Notification Tool.**

Section Conclusion

In this part of the demonstration, you learned that:

• The help desk, working as a team and using the Action Request System, is able to resolve the call quickly. While the call is initially assigned to a help desk staff member who could not resolve the call, reassignment and notification features of the AR System directed the request to a technician with the proper experience.

• Closed calls remain in the database to allow system users to access past calls. This also allows help desk managers to generate performance reports.

End User Notification of Call Closure

The workflow is now coming full circle. Joe User submitted his call to the help desk. Francie, the front line engineer, realized she did not have the expertise or access to the knowledge needed to resolve the request. Francie reassigned the ticket to Bob, a backline software specialist. The AR System notified Bob of the reassignment and Bob acted on the request and communicated the solution to Joe User. Finally, in this step, the AR System notifies Joe of the solution, and informs him the call is closed.

To log in to the Notification Tool and review the DemoHelpDesk ticket:

1. **Restore the AR System Notification Tool by double-clicking the AR Notifier icon.**

2. **Choose Login from the File menu. The Login dialog box appears.**

3. **In the User Name field, type `Joe User`. Leave the password blank. Click the OK button.**
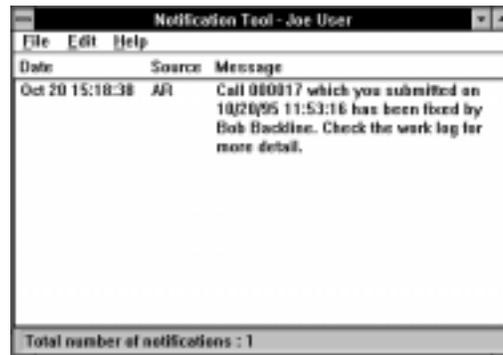
Figure 2-22 End User Closed Call Notification

A message informing Joe User of the closed call appears in the Notification Tool.

4. **Exit the Notification Tool by double-clicking the control box in the upper-left corner of the tool, then clicking Yes in the warning box which appears.**

Section Conclusion

You have learned the following attributes of the AR System:

- The Notification Tool can alert users of closed calls, just as it alerts help desk personnel of assigned calls.

- Because Bob Backline entered the solution details in the work log, the information can be used by other users and help desk staff members who encounter the same problem.

- The AR System integrates robust problem management with problem resolution aids and workflow processing, increasing the productivity of help desk personnel and help desk customers.

Administrator Adds a Field to the DemoHelpDesk Schema

In addition to strong workflow processing and problem resolution capabilities, the AR System is highly customizable. In this step you will add a field to the DemoHelpDesk schema for the user to describe his satisfaction with the service of his request. At the conclusion of this demo, you will see this new field added to the schema.

To log in to the AR System Administrator Tool:

1. **Double-click the AR Admin icon to launch the AR System Administrator Tool. The Login dialog box appears.**
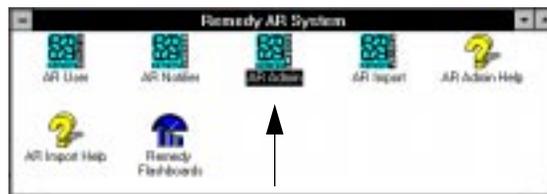
Figure 2-23 Administrator Tool in the AR Program Group

2. **Make sure `Bob Backline` is in the User Name field. Leave the password blank. Click the OK button.**

To select an object to modify:

1. **Double-click the server name listed on the left side of the Server window. A list of AR System object categories is displayed, as shown in Figure 2-24.**

Figure 2-24 Database Object Categories

2. Double-click the Schemas icon.
The right hand window displays a list of all schemas on this server.

3. Double-click DemoHelpDesk to open the DemoHelpDesk Schema for modification. The Modify Schema window appears.

To create a new field:

1. From the Schema menu, choose Create New Field and pull right to choose Selection. The new field is added in the top left corner of the schema, as shown in Figure 2-25.
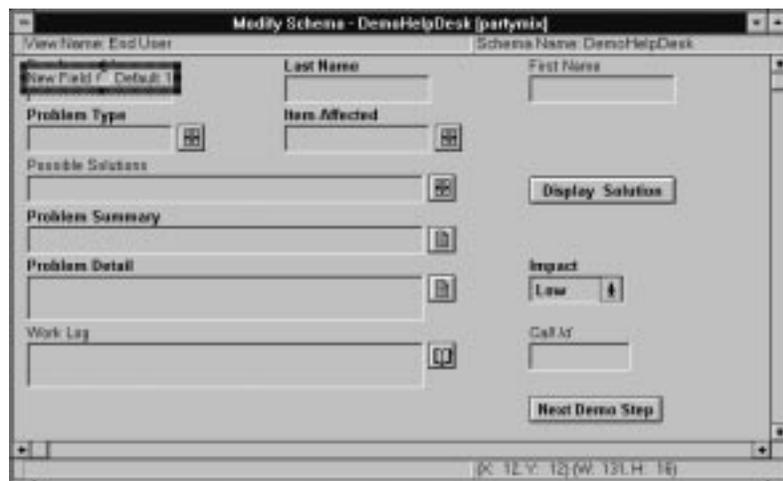
Figure 2-25 New Field Added to Schema

2. **Click in the center of the new field and hold the mouse button. Drag the field down to just below the Work Log field. Release the mouse button.**

To define field properties:

1. **Double-click the new field to open the Field Properties dialog box for the new field. This dialog box is a tabbed dialog box. Often, you will enter data in each of the panels, but in this lesson, we will change only three.**

2. **On the first tab, labeled Display, change the contents of the Label field to `Customer Satisfaction`. Notice that the changes you make are immediately reflected on the screen.**

3. **Change the location definition for the label to Top.**

Figure 2-26   Changing the Text and Placement of the Field Label

To define selection field values:

1. **Click the Attributes tab.**

2. **Remove Default 1 from the Value box and replace it with: `Improve`. Click the Modify button.**

3. **Double-click Improve in the Value box and type: `Average`. Click the Add Before button.**
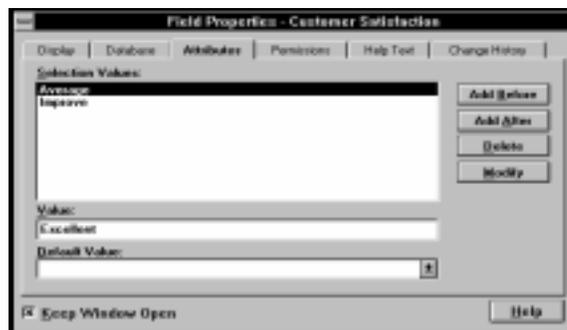
Figure 2-27   Field Selection Values

4. **Double-click Average in the Value box and type: `Excellent`. Click the Add Before button.**

To define field permissions:

1. **Click the Permissions tab.**

2. **By default, only members of the Administrator group have access to a newly created field. Select Submitter in the No Permission box and click the Add button to add this group to the Permission box.**

3. **Click the eyeglass menu button next to Submitter and choose Change permission. Note that the eyeglass menu button switched to a pencil menu button, indicating that you have switched the setting for this field from view permission to change permission for the Submitter group.**

4. **Select Public from the No Permission box and click the Add button to add this group to the Permission box.**
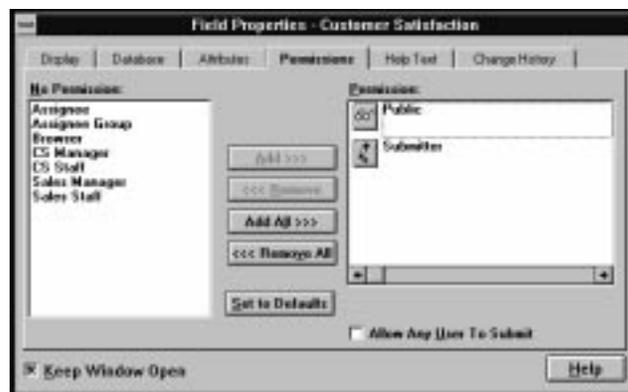
Figure 2-28 Field Permissions Based on Group Membership

5. **Close the Field Properties dialog box by double-clicking the control box in the upper-left corner of the box.**

Note – Field permissions protect sensitive information. By giving Public view access to a field, you allow any AR System user to view the field's contents. In this instance, however, only the Submitter can change the field's contents. For more information on field permissions, see the *Action Request System Administrator's Guide.*

To save modifications to the schema:

1. **Choose Save Schema from the File menu.**

2. **Close the Modify Schema window by double-clicking the control box in the upper-left corner of the window.**

3. **Minimize the Administrator Tool.**

View the New Field

Log in to see the new field. When an administrator makes a change to any aspect of a schema, the users simply log in to retrieve the changes.

To open the DemoHelpDesk schema in the AR System User Tool:

1. **Double-click the AR System User Tool icon to launch the User Tool.**

2. **From the File menu, choose Login. The Login dialog box appears.**

3. **Make sure Joe User is in the User Name field. Leave the password blank and click OK.**

4. **Choose Open Submit from the File menu. The Open Submit dialog box appears.**

5. **From the schema list, select DemoHelpDesk, then click the OK button. The DemoHelpDesk schema appears, as shown in Figure 2-29. Notice that the field you just added is displayed and usable.**

Figure 2-29 New Field on the DemoHelpDesk Schema

6. Exit the User Tool by choosing Exit from the File menu.

Section Conclusion

In this part of the demonstration, you added a new field to the DemoHelpDesk schema, without directly accessing the underlying database. You have seen that:

- Through a series of point-and-click operations, you were able to add a field to a schema. No knowledge of relational databases or programming languages is required.

- The AR System offers rich control of how fields are displayed. You specified the location of the field and the field's label. The selection list is presented as radio buttons, but with the click of a button, it could be displayed as a menu.

- You can use the Administrator Tool to define additional workflow objects, such as active links, filters and escalations. Creating and modifying these objects is as simple as creating a new field.

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Congratulations!

You have now completed a very brief overview of how you can use the AR System to automate the workflow of an internal help desk application. You have seen how users and help desk personnel can work together to resolve requests. Included with the Help desk applications are workflow rules and a solutions database that can enhance service quality, lead to consistent service for every request, and even reduce costs.

You worked with the desktop beeper feature, the Notification Tool. You also worked with the Administrator Tool to explore ways you can design schemas and workflow rules to meet your organization's business needs. Without any programming, you defined and added a selection field to the schema. With similar ease, you can create your own AR System applications or customize the sample schemas provided with the AR System.

Restoring the Demonstration Environment

During the Help Desk demonstration, you made some changes to the default demonstration environment. If you wish to start the demonstration over, or restore it for another user, follow the procedure below.

To restore the demonstration environment:

1. **Maximize the AR System Administrator Tool by double-clicking its icon.**

2. **Double-click the server name listed in left side of the Server window. A list of AR System object categories is displayed.**

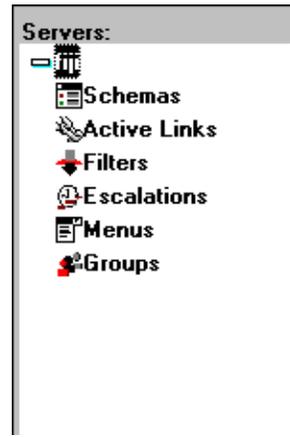3. **Double-click the Schemas icon. The right hand window displays a list of all schemas stored on this server.**

4. **Double-click DemoHelpDesk to open the DemoHelpDesk schema for modification.**

5. **Click the Customer Satisfaction field to highlight this field.**

6. **From the Edit menu, choose Delete.**

7. **Click Yes To All at the "Are you sure that you wish to delete/cut Field: Customer Satisfaction" prompt.**

8. **Click OK in the box which informs you of the changes you will make.**

9. **From the File menu, choose Save Schema.**

10. **Minimize the Administrator Tool.**

Where to Go from Here

Now that you have successfully completed the AR System Help Desk Demonstration, you can proceed to other tasks. Remedy provides some helpful products to help you understand more about the processes you would like to implement, as well as how to use the AR System to achieve these goals. This section lists some suggested directions in which to proceed to get your help desk completed.

Review the Sample Schemas Included with the AR System

The Action Request System provides a suite of sample schemas that you can review to understand process definition and implementation. For more details, see Chapter 4.

Install the AR System Help Desk Template

Your AR System package includes a CD with the AR System Help Desk Template. This template contains a group of schemas that you can use for internal help desk applications. The template includes sophisticated workflow already defined to aid in problem definition and resolution, auto assignment of tickets based on problem type, and the ability to access and modify the solutions database from the HelpDesk schema. For more information on the AR System Help Desk Templates, see the accompanying *Help Desk Templates Guide for Users and Administrators.*

Start Developing Your Own Help Desk Application

If you feel comfortable in the process definition at your site, and in your ability to create defined workflow with the AR System, you can start creating your own schemas, active links, filters and escalations with the AR System Administrator Tool. For more information regarding workflow definition and implementation, see the *Action Request System Administrator's Guide.*

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Help Desk Demonstration for UNIX 3

Once you have installed the AR System server and client tools, you are ready to experiment with the software. Your AR System package comes with two demonstrations to help you learn about the benefits, features, and functionality of Remedy's Action Request System, the leading help desk Solution. The first demonstration is the self-running Action Request System Demo Disk. Use the demonstration diskette on any UNIX station or Windows PC to learn about the key benefits and uses of the AR System. Install and run the demo according to the instructions on the disk label.

The second demonstration is the Help Desk Demonstration, which is described in this chapter. It features live use of the AR System Server and Tools and is a great way to familiarize yourself with the operation of the AR System. You will follow a detailed script to track a problem from initial submission to closure, learning about the design and functionality of the AR System along the way. Additionally, you will learn how to use the Administrator Tool to customize applications. The complete demonstration consists of five sections and, if you are a first time user, takes about 45 minutes to complete.

By working through the demonstration, you will:

- See how a team works together and, with the aid of pre-defined, site-specific workflow rules, quickly resolves user requests for assistance.

- Learn the basics of how to use the AR System User, Notification and Administrator Tools.

- See ways to use the AR System to automate your business workflow.

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Introducing Joe, Francie, and Bob

This scenario introduces you to three people — Joe User, Francie Frontline, and Bob Backline. Joe, Francie and Bob represent three types of users who can take advantage of the AR System in a typical help desk environment.

During the course of this Help Desk demonstration, you will at some point assume the role of each user. Let's meet them now:

Joe User: Joe is an AR System end user. Running the AR System is not Joe's main job. In fact, Joe needs to run the AR System User Tool only when he has a problem with the hardware or software that he does use regularly. Joe can also run the AR System Notification Tool to ensure that he is notified when any problem he submits is fixed. Joe is experiencing problems connecting to Remedy Corporation's Home Page on the World Wide Web (WWW). He will submit a help desk ticket to get the problem resolved.

Francie Frontline: Francie is a first line support staff member. She typically submits calls and acts as a generalist for problem resolution at the company's internal help desk. In this role, she attempts to resolve each issue, and, if she is unable to do so, assigns incoming requests for help to the appropriate help desk staff member. She then follows up to make sure all problems are resolved in a reasonable period of time.

Bob Backline: Bob usually gets calls assigned to him from other support staff members. As a back line staff member, Bob is a specialist with a more narrow area of expertise than the front line staff. He resolves the call and updates information in the ticket.

Now it's time to start the Help Desk demonstration and have some fun. You will follow a single problem through a simple problem resolution process. In some cases, an Administrator's Note outlines the workflow process used to create the actions you see happening in the demonstration.

1. Submit new problem.

3. Fix problem.

2. Analyze and possibly reassign problem.

The demonstration script will guide you through the keystrokes you need to make to complete each step.

Starting the Demonstration

When you installed the AR System server, a directory named `demo` was created in the directory where you installed the AR System (`<install_dir>`). By default, this directory is `/usr/ar/demo`. The `demo` directory contains setup scripts for each user (Joe, Francie, and Bob). In order to run the Help Desk demonstration, you need to run the `arDemoStartup` script, which launches the AR System tools for Joe, Francie, and Bob.

Note: In a real work environment, each of these users would be running their AR System tools on separate machines. In this demonstration, we simulate three separate machines by displaying each user's AR System tools in different corners of your screen.

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By issuing the following commands, you will both change to the directory in which the AR System was installed, and start the `arDemoStartup` script:

```
cd /<install_dir>/demo

arDemoStartup
```

If you get Xlib errors, you may need to enter the command `xhost +` before you run the `arDemoStartup` script.

Once you have started the demonstration, your monitor will show the various tools of the three members of the sample Help Desk. Joe User's tools are in the upper-right portion of the screen, Francie Frontline's tools are in the lower-left corner, and Bob Backline's station is in the lower-right area of the screen.
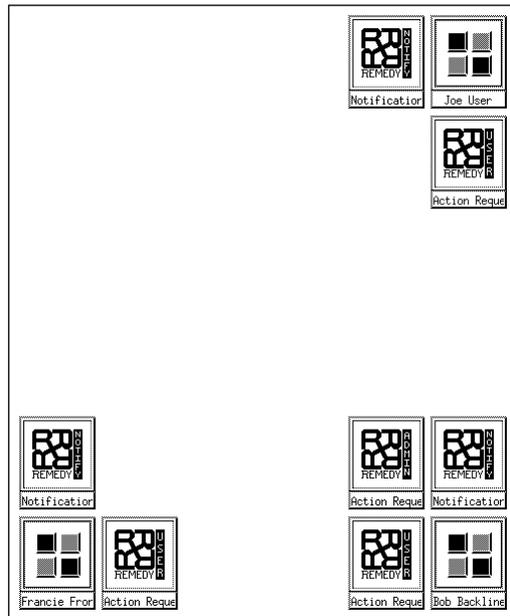
Figure 3-1   Demonstration Workspace

An Internal User Submits a Ticket

The Computing Services Group recently installed two new pieces of software on Joe User's computer: the Remedy Action Request System User Tool and Web Wanderer, a WWW browser. Joe is very interested in accessing information from the WWW and attempts to locate the Remedy Corporation home page at `http://www.remedy.com`.

While the Web browser itself seems to function properly, Joe's browser displays an error message when he tries to access the Remedy home page. Anxious to get beyond the error, Joe proceeds to use his other new software tool, the AR System User Tool, to initiate a service request with his internal help desk. The help desk trainer has told Joe that the AR System User Tool is like dialing 911, with calls going directly to the help desk. Joe decides to make his call to the help desk using the new tool.

Open the DemoHelpDesk Schema

In this section, you will act as Joe User and begin by opening the DemoHelpDesk schema in your User Tool. A **schema** is a form that represents a set of related data in the AR System database. The DemoHelpDesk schema is designed to be used for service requests.

To open the DemoHelpDesk schema as Joe User:

1. **Open Joe's AR System User Tool by double-clicking the User Tool icon in the upper-right portion of your screen.**
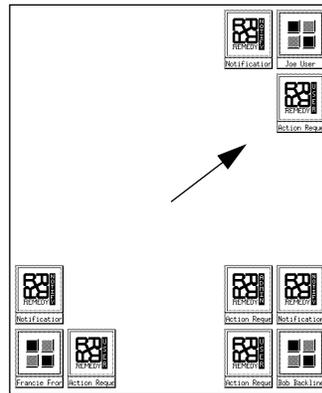
Figure 3-2   Demonstration Workspace — Joe's User Tool

2. Select Open Schema from the File menu. The Open Schema dialog box appears.
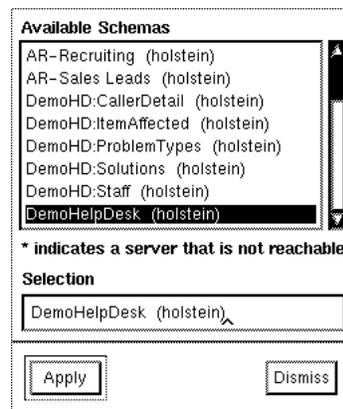
Figure 3-3   Open Schema Dialog Box

3. **Double-click the entry for the DemoHelpDesk schema. The DemoHelpDesk query window appears, and should look similar to Figure 3-4.**

Figure 3-4   End User View of the DemoHelpDesk Schema

You have just opened a Query window containing the DemoHelpDesk schema. Query windows differ from submit windows. Query windows are used primarily by users to query the database, and make modifications to existing data.

4. **From the File menu, select Open Submit. A Submit window for the DemoHelpDesk schema appears.**
   Joe User can submit a record of his particular problem using the submit window for the schema.

You have successfully entered the AR System as Joe User, selected the schema used for entering problems, and opened a submit window for that schema. Next, you will fill in the information regarding the problem Joe is having.

Provide Information About the Request

Joe needs to provide information to the help desk staff about the problem he is encountering. Typically, a user such as Joe provides the help desk with details about himself, as well as the problem.

To fill the DemoHelpDesk ticket with pertinent information:

1. **In the Employee Id field, type** `3000` **and press Enter.**
    Since Joe User has contacted the help desk in the past, his caller record
    exists and information about him is on file. When you press Enter, notice
    Joe's first and last name are automatically filled in.
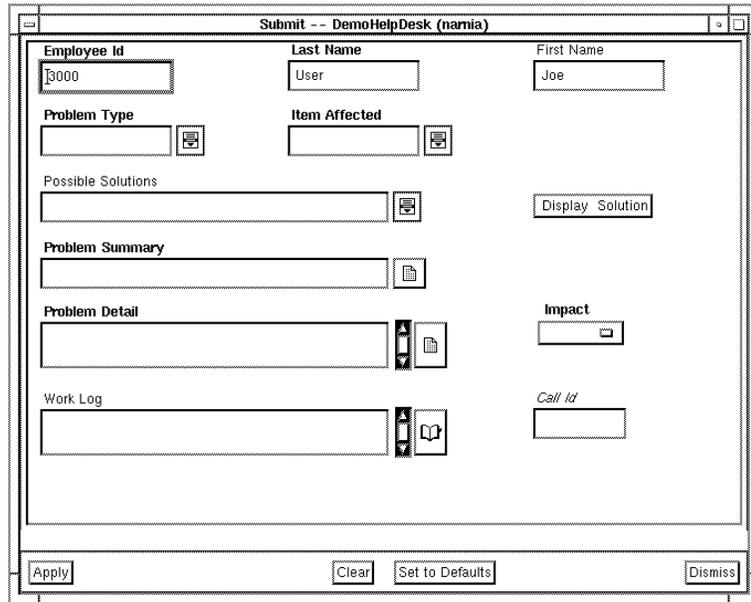
Figure 3-5   DemoHelpDesk Schema with Auto-Filled Data

Note – The auto-fill capability demonstrated here is achieved by an **active link**.
The active link takes the employee number as query criteria, queries the
DemoHD:CallerDetail schema for a match, and returns the data.

2. **Locate the Problem Type field. Click the character menu icon,** and
    select Software from the menu.

3. **Locate the Item Affected field. Click the character menu icon to the right**
    of the field, then select Web Browser.

Figure 3-6   Query Menu on the DemoHelpDesk Schema

Notice that all selections in the Item Affected field menu are related to software. This information is based on the previous selection made in the Problem Type field.

Note – The values of the Item Affected fields are provided by a **query style menu**, which takes the criteria to match from the Problem Type field. It then queries the DemoHD:ItemAffected schema to find all entries related to a Problem Type definition of Software.

End User Searches for the Solution

Joe has the ability to check the solutions database to see if a similar problem was reported in the past, and what the resolution might be.

To search the Solutions database from the DemoHelpDesk schema:

1. In the Possible Solutions field, click the character menu icon.
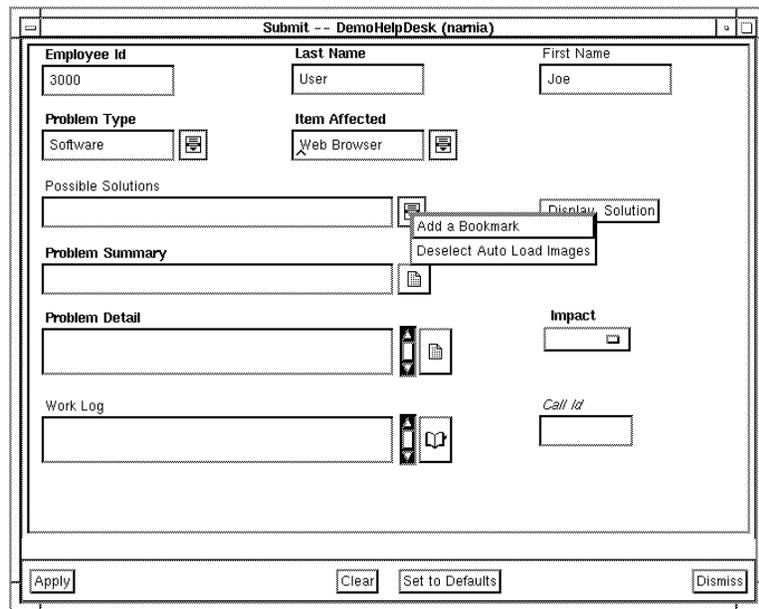
Figure 3-7   Possible Solutions Displayed on DemoHelpDesk

The AR System shows all known solutions matching the contents of the Problem Type and Item Affected fields. Joe reviews these solutions, and realizes none apply to the problem he is encountering.

Note – The ability to search the possible solutions database is achieved with a **query style menu**. This menu queries the DemoHD:Solutions schema for all entries with matching values for the Problem Type and Item Affected fields.

---

2. **Since none of the possible solutions are appropriate, release the mouse button to dismiss the menu selections.**

3. **In the Problem Summary field, type:** `Cannot access Remedy home page.`

4. **Click the text editor icon to the right of the Problem Detail field.**
   Click in the Problem Detail text editor that opens, then type: `Using Web Wanderer 2.1 for Motif. Error message: fatal error 500; can't access document.`
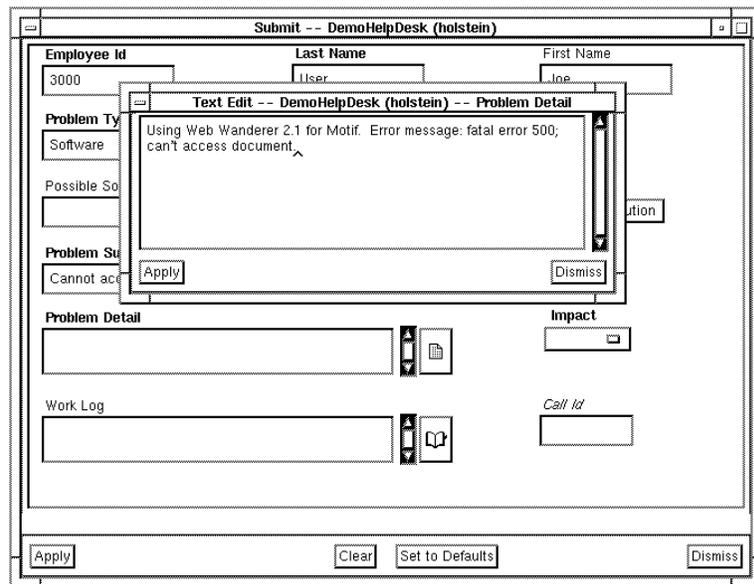
Figure 3-8   Problem Detail Text Field in the DemoHelpDesk Schema

5. **Click Apply to close the text editor.**

6. **In the Work Log field, type in the following text:**
   ```
   Did not see a logical solution in Possible Solutions list.
   Please analyze.
   ```

7. **Click the Impact selection field. Select Medium.**

Submit the Request to the Help Desk Staff

Once Joe has finished filling in the necessary information and submitted the ticket, the help desk staff will help him resolve his problem.

To submit the ticket to the database:

You have entered all data needed for problem submission. Now submit the ticket.

The Call ID field will fill in automatically when you submit the ticket.

1. **Click Apply to submit the request. When you submit the ticket, notice that a message is displayed on your screen, as shown in Figure 3-9.**
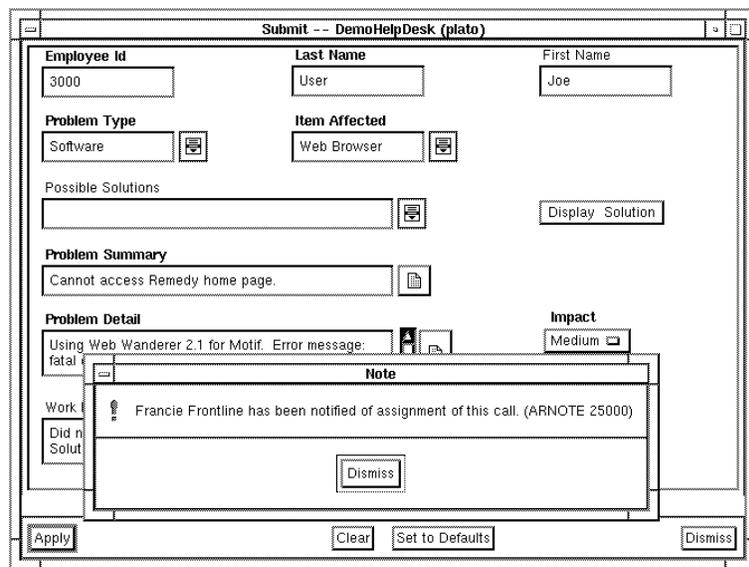
Figure 3-9   Notification of Assignment

Note – The message is achieved with a **filter**. This filter has two actions. The first displays a message to the submitter, letting Joe know the ticket is assigned to Francie. The second action notifies the assignee of the new ticket.

2. **Click Dismiss to dismiss the message.**
   In the lower portion of the window, you see the text:

`Submit Successful-ID=xxxxxx`
   where *xxxxxx* is a number representing Joe's ticket ID. He can refer to this ticket number when contacting the help desk regarding this request.

3. **Click Dismiss to close the Submit window.**

4. **Minimize Joe's User Tool.**

Section Conclusion

You have successfully submitted a call. So far, you have learned the following:

- End user participation is encouraged with the AR System. End users commonly submit their own requests, and even perform self help. Help desk staff can focus their efforts on resolving requests, while end user satisfaction is enhanced through participation.

- Some fields require data entry, while others can be automatically filled out by the system. Menu selections simplify data entry even further.

- The AR System can route tickets automatically to the appropriate staff members, and notify them using the Notification Tool. The Notification Tool is explained in greater detail later in the demonstration.

- End users have a simple view of the help desk application, making data entry quick and easy. Users can be successful with minimal training.

Frontline Technician Works on the Submitted Call

Now that you have entered a new call as Joe User, you will assume the role of Francie Frontline, a help desk technician, and bring the call to resolution. As you saw in the previous section, Francie Frontline has been assigned Joe's call. This assignment was made by the system and was based on a defined business rule: Assign all software problems to Francie Frontline. The Action Request System allows you to simply define and change business rules for processing any request. In this lesson, you will see how the help desk responds to the call.

Assume the Role of the Front Line Staff Member

Open Francie Frontline's User Tool to see what workflow changes are designed for frontline users.

To use the DemoHelpDesk schema as a frontline staff member:

1. **Find Francie Frontline's User Tool in the lower-left portion of your screen.**

2. **Double-click the User Tool icon. Francie's User Tool opens with the query window for the DemoHelpDesk schema already present.**

Figure 3-10   Francie Frontline's View of the DemoHelpDesk Schema

Notice that Francie's view of the DemoHelpDesk schema is different. It is optimized for front line help desk personnel. Francie's view includes buttons, as well as new fields like Phone, Submitted-by, Arrival Time, and Status. Francie needs this additional information to resolve tickets.

Front Line Technician Examines Call Queue

Francie needs to determine her workload. She can browse through the DemoHelpDesk entries and search for the tickets assigned to her, but in this case some workflow has been created to make the task easier.

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To get the details of the newly assigned call:

1. **On the DemoHelpDesk schema, click the button labeled List My Open Calls. This performs a query of DemoHelpDesk tickets and lists the calls in Francie's work queue, as shown in Figure 3-11.**


```
┌─────────────────────────────────────────────────────────────────────┐
│ ▭ │          Query List -- DemoHelpDesk (holstein)            │ □ │ □ │
├─────────────────────────────────────────────────────────────────────┤
│ Query   Actions                                                       │
│ Matching entries:                                                     │
│ ┌───────────────────────────────────────────────────────────────┐    │
│ │ 000003      Keep getting parity errors,   Francie Frontline    PendingInfo     │
│ │ 000005      Out of paper error on the prin Francie Frontline   WorkInProgress  │
│ │ 000008      Can't send mail.              Francie Frontline    WorkInProgress  │
│ │ 000010      Phone messages cannot be forwa Francie Frontline   Assigned        │
│ │ 000012      System keeps getting "Out of m Francie Frontline   WorkInProgress  │
│ │ 000014      Crashes with a GPF at 00AA:124 Francie Frontline   Assigned        │
│ │ 000017      Cannot access Remedy home page Francie Frontline   Assigned        │
│ └───────────────────────────────────────────────────────────────┘    │
│ Number of matching entries : 7  (11/30/95 14:24:16)                   │
│ Poll   ◆ Off ◇ On   │10│ ▲ ▼ Minutes                                  │
│ ┌─────────┐                                           ┌─────────┐    │
│ │ Refresh │                                           │ Dismiss │    │
│ └─────────┘                                           └─────────┘    │
└─────────────────────────────────────────────────────────────────────┘
```

Figure 3-11 All Tickets Currently Assigned to Francie Frontline

Note – The List My Open Calls button is an **active link** that queries all entries in the DemoHelpDesk schema with Francie Frontline in the Assigned-to field and a Status other than closed.

2. **Double-click the entry displaying the words "Cannot access Remedy home page." Joe User's ticket is displayed in Modify Individual mode, allowing Francie to modify portions of the ticket.**

3. **Review the information in the ticket by clicking the book icon to the right of the Work Log field.**

Notice the icon is a book with writing on the pages, indicating data has been entered in this diary. Notice also Joe User's previous entry describing the step he has already taken. It has been stamped with his user name, and the time the entry was made.

Upon review, Francie sees that Joe could not find an appropriate solution in the solutions database.

4. **Click Dismiss on each to close the Work Log dialog box and Query List window.**

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Front Line Queries DemoHelpDesk Database for Resolution

Francie decides to query the DemoHelpDesk database for closed calls fitting this problem type. Perhaps a ticket similar to this has been resolved in the past, and she can use that information in this instance. The search Joe performed earlier was against the Solutions database. Francie will search the HelpDesk database to see if a solution has been found but not submitted to the Solutions database.

Several times in this demonstration, you have automated queries through the use of active links in menu selections and buttons. As Francie, you will now perform a query-by-example to generate a query for a solution. You will use this method to see a list of closed DemoHelpDesk tickets with a Problem Type of Software and Item Affected of Web Browser.

To use the database to find possible solutions:

1. Select Clear All from the Edit menu to clear the fields in the schema.

2. From the menu in the Problem Type field, select Software.

3. From the menu in the Item Affected field, select Web Browser.

4. From the menu in the Status field, select Closed.

5. From the Query menu, select List.
A list of all closed calls with matching criteria appears. In browsing the entries returned, you see there is no entry specific to the issue Joe User is reporting.
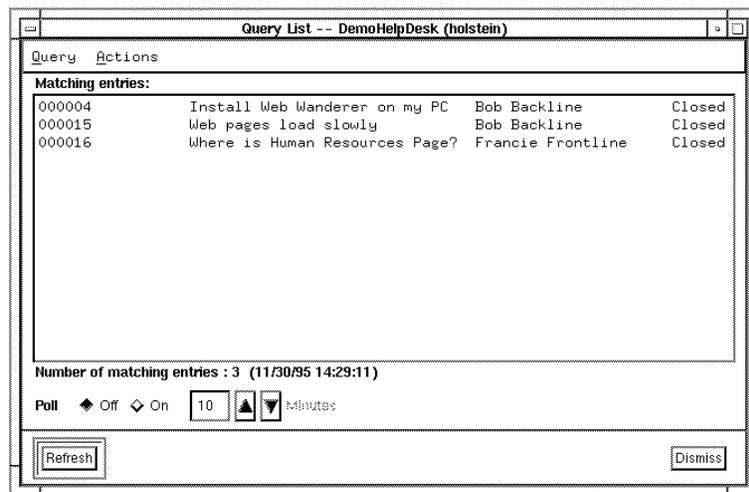
Figure 3-12   Query-by-Example Results

6. **Close the Query List window by clicking Dismiss.**
   In this case, you viewed the query results in the list format. You could also have chosen to view matching tickets in report or display format. In display format, all fields in the ticket are displayed in read-only mode. Report format offers output options including screen, file or printer.

7. **From the Windows menu, select Modify Individual.**
   This brings Joe User's ticket back to the foreground.

Front Line Reassigns Ticket to More Experienced Staff Member

Francie needs to enter information about the steps taken so far, and reassign the call to a more experienced Support Staff member. She will begin by making an entry in the Work Log field. The Work Log is a diary field that keeps a running record of actions taken on the ticket.

To enter work data and reassign the ticket:

1. **Make an entry into the Work Log by clicking the book icon to the right of the Work Log field.**

Type the following text in the editor box:

```
No solution in the solutions schema or DemoHelpDesk database.
Bob, weren't you able to access the Remedy home page last week?
Please look into this request.
```
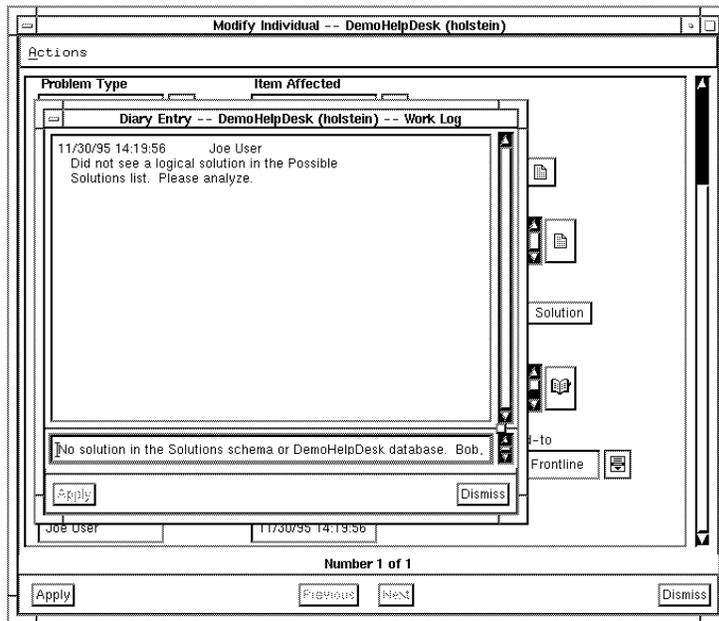
Figure 3-13 The Work Log Diary

2. **Click Apply to close the Work Log data entry box.**

3. **Assign the call to Francie's colleague, Bob Backline, who has more experience with Web Browsers.**
   Click the menu icon to the right of the Assigned-to field, and select Bob Backline.
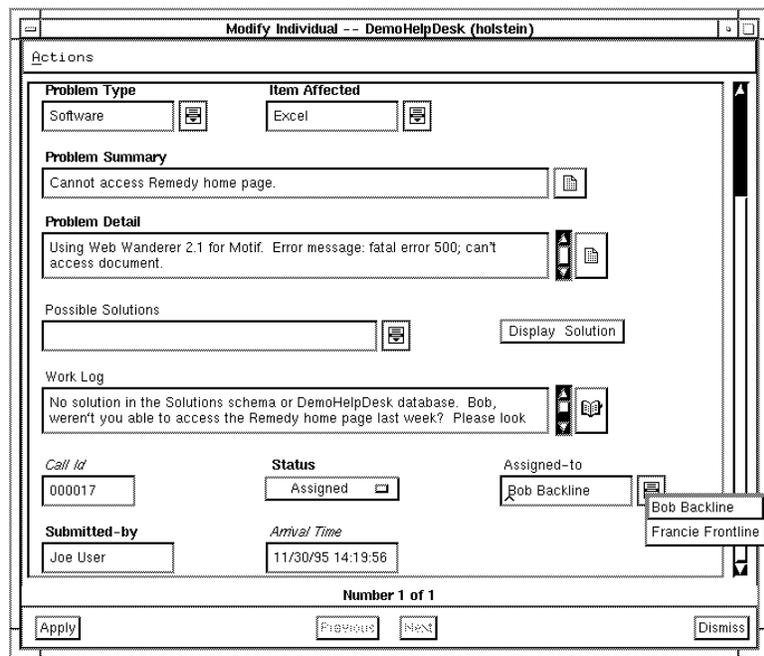
Figure 3-14 Francie Reassigns the Ticket

4. Click Apply to apply the changes to the request. Note the message that is displayed on your screen.

5. Click Dismiss to dismiss the message.

6. Click dismiss to close the Modify Individual window.

7. Check Francie's queue again by clicking the List My Open Calls button. Notice that Joe User's call is no longer in her queue, allowing Francie to proceed to other tickets.
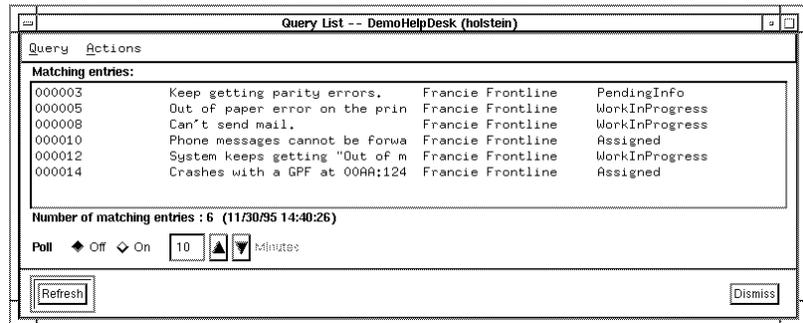
Figure 3-15 Francie Re-checks her Tickets

8. Click Dismiss to close the Query List.

9. Minimize Francie's User Tool.

Section Conclusion

Now you have seen how help desk staff can use the capabilities of the AR System to work on a call. In this section, you have learned that:

- The frontline technician has a different view of the help desk application. Much as the user view is optimized for quick and easy submission by occasional users, the frontline view is optimized for nearly full time use by frontline technicians to manage their work queues and to resolve calls quickly.

- Common steps used by help desk personnel can be automated as part of the schema view. Automation can be driven through menu selections, buttons and applying changes to the database. Automation provided the frontline technician with information on open calls and possible solutions.

- A solution schema is a primary aid for help desk personnel to quickly resolve calls. You can build solution schemas to include common problems at your site.

Backline Technician is Notified of a Ticket

In this section you will assume the role of Bob Backline, the backline technician, and begin with a different tool — the Action Request System Notification Tool. The Notification Tool works like a desktop pager to alert Help Desk staff members of any requests that require their attention.

Backline Technician Retrieves the Ticket via Notification Tool

Bob sees that a call has been assigned to him, via the Notification Tool. Bob retrieves the notification and reviews the call in the User Tool.

To retrieve the DemoHelpDesk ticket from the Notification Tool:

• Double-click Bob's AR System Notification Tool icon in the lower-right corner of your screen to launch the AR System Notifcation Tool.
A message appears in the Notification Tool, informing Bob that a new Medium Priority call has been assigned to him.
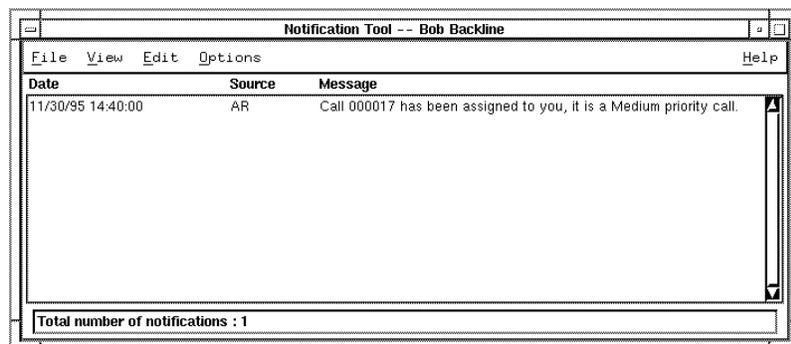
Figure 3-16 Notification of Assignment

To get details of a DemoHelpDesk ticket notification:

• Double-click the entry in the Notification Tool to open the associated ticket. With this action, you open the AR System User Tool, and open the DemoHelpDesk ticket in Modify mode. This makes it possible for you to add information to the ticket as soon as you receive it.
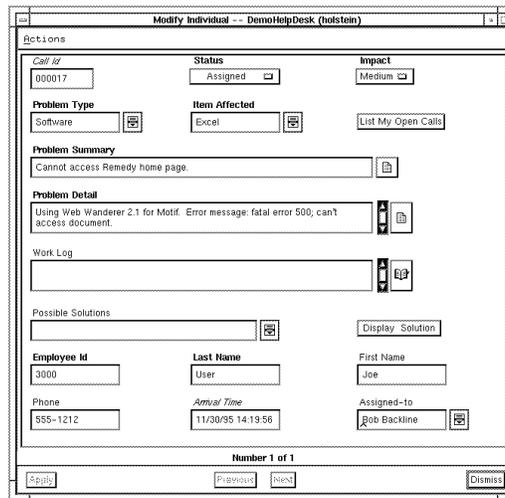
Figure 3-17 Get Details in a Modify Individual Window

In this part of the demonstration, you have learned that:

- The Notification Tool is like a desktop pager, alerting you of issues that require your attention.

- Notification is driven by business rules specified by your System Administrator. These rules can be changed to meet your specific needs through the AR System Administrator Tool, discussed later in this chapter.

- The AR System Notification and User Tools are linked. Double-clicking an entry in the Notification Tool opens the User Tool, and displays the details of your call.

Backline Technician Resolves the Call

Drawing from his experience with Web Wanderer, Bob is able to recommend a solution to Joe's request. Bob will provide a solution by outlining the steps Joe can take to access Remedy's Home Page, and will then close the call. In addition, Bob's actions are stored in the AR System for others to use as a solution in the future.

While reviewing the ticket, notice that you are now displaying a third view that is optimized for back line staff members. Problem description and problem resolution information is emphasized at the top of this view, while contact information is de-emphasized.

To review the call and provide the resolution:

1. **Review the Problem Type, Item Affected, and Problem Summary fields.**
   In reviewing this information, Bob realizes Joe needs to define the proxy information for his Web Wanderer configuration.

2. **Click the book icon to the right of the Work Log field, and enter the solution details in the box at the bottom of the Work Log:**

```
Select proxies under Web Wanderer's options menu.

Find the line for http protocol.

Set the proxy server to "firestorm".

Set the proxy port to "80".
```

3. **Click Apply to close the Work Log field data entry box.**
   Bob now contacts Joe and they review the steps outlined in the Work Log. Upon completing these steps, Joe is able to access Remedy Corporation's home page on the World Wide Web.

4. **Click the Possible Solutions field and type:**

```
Specify a proxy server and a proxy port.
```

This displays a short summary of the actions detailed in the Work Log field. This information can be used for end users to research problem resolutions.

Backline Technician Closes the Call

To close the call:

1. **In the Status field, change the Status to Closed.**

2. **Click Apply to save the changes to the ticket. Notice the notification message displayed on your screen.**
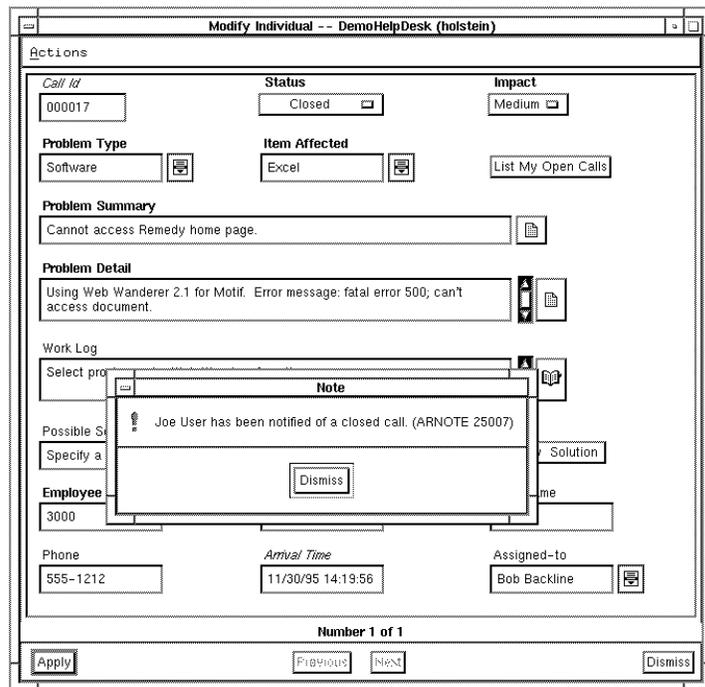
Figure 3-18   Notification of Closed Call

3. Click Dismiss to dismiss the message.

4. Click Dismiss to close the Modify Individual window.

5. Minimize Bob's User Tool and Notification Tool.

Section Conclusion

In this part of the demonstration, you learned that:

- The help desk, working as a team and using the Action Request System, is able to resolve the call quickly. While the call is initially assigned to a Help Desk staff member who could not resolve the call, reassignment and notification features of the AR System directed the request to a technician with the proper experience.

• Closed calls remain in the database allowing system users to access past calls, and allows help desk management to generate performance reports.

End User Notification of Call Closure

The workflow is now coming full circle. Joe User submitted his call to the help desk. Francie, the front line technician, realized she did not have the expertise or access to the knowledge needed to resolve the request. Francie reassigned the ticket to Bob, a backline software specialist. The AR System notified Bob of the reassignment and Bob acted on the request and communicated the solution to Joe User. Finally, in this step, the AR System notifies Joe of the solution, and informs him the call is closed.

To review DemoHelpDesk tickets:

1. **Open Joe's Notification Tool by double-clicking the AR Notifier icon in the upper-right portion of your screen.**
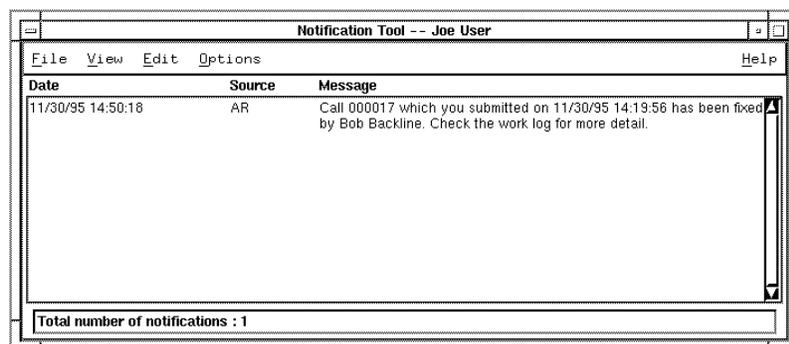
Figure 3-19 End User Closed Call Notification

A message informing Joe User of the closed call appears in the Notification Tool.

2. **Minimize the Notification Tool.**

Section Conclusion

You have learned the following attributes of the AR System:

- The Notification Tool can alert users of closed calls, just as it alerts help desk personnel of assigned calls.

- Because Bob Backline entered the solution details in the work log, the information can be used by other users and help desk staff members who encounter the same problem.

- The AR System integrates robust problem management with problem resolution aids and workflow processing, increasing the productivity of help desk personnel and help desk customers.

Administrator Adds a Field to the DemoHelpDesk Schema

In addition to strong workflow processing and problem resolution capabilities, the AR System is highly customizable. In this step you will add a field to the DemoHelpDesk schema for the user to describe his satisfaction with the service of his request. At the conclusion of this demo, you will see this new field added to the schema.

To add a field to a schema using the AR System Administrator Tool:

1. **Double-click Bob's AR System Administrator Tool icon to open the Administrator Tool.**
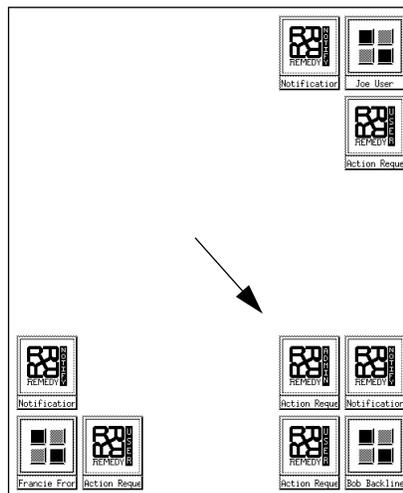
Figure 3-20 Demonstration Workspace — Francie's Administrator Tool

2. Select Login from the File menu. The Login dialog box appears. Make sure `Bob Backline` is in the User Name field. Leave the password blank. Click Apply.

3. From the Category menu, select Schemas.

4. Double-click DemoHelpDesk to open the DemoHelpDesk Schema for modification. The Modify Schema window appears.

5. From the Views menu, pull right on Select and select End User (UNIX) to modify the view with which Francie's end users will work.

To create a new field:

1. From the Edit menu, select New Field. The new field is added in the top left corner of the schema. The Field Properties dialog box for the new field also appears.
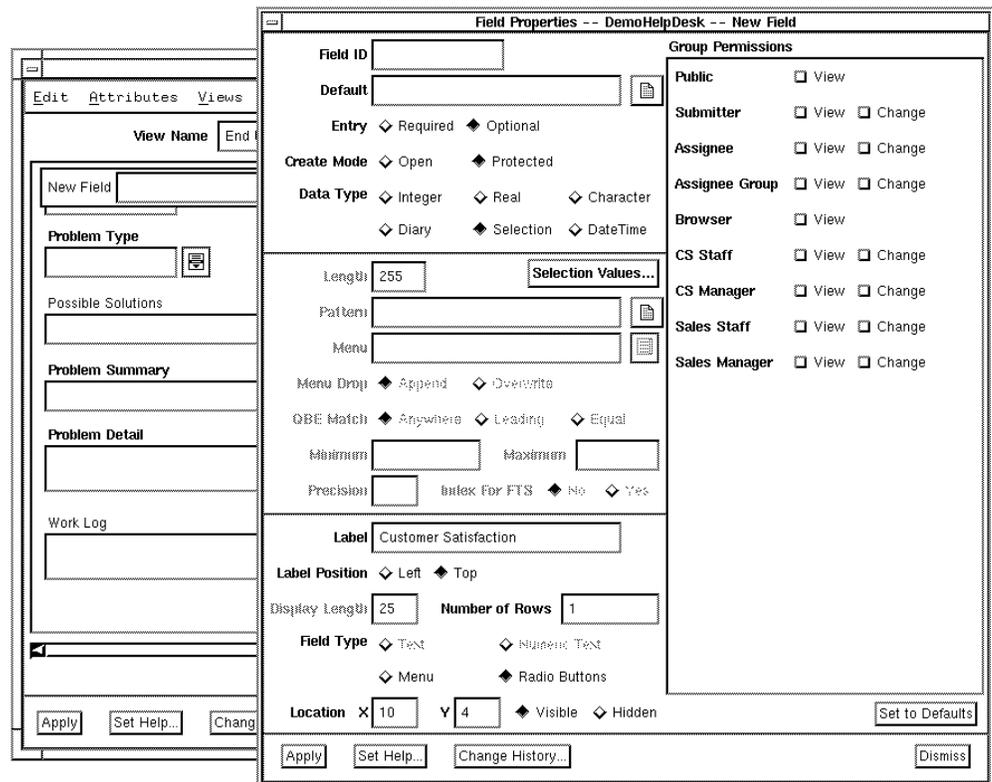
Figure 3-21 New Field Added to Schema

2. **Click in the center of the new field and hold the mouse button. Drag the field down to just below the Work Log field. Release the mouse button.**

To define field properties:

The Field Properties dialog box contains several settings. Often, you will enter data in many of the panels, but for this lesson, you will make few changes.

1. **Change the Data Type field to Selection.**

2. **Change the contents of the Label field to** `Customer Satisfaction.`

3. **For the Label Position field, select Top.**

To define selection field values:

1. **Click Selection Values. The Selection Values dialog box appears.**

2. **Select the Choice box and type `Excellent`. Click Append.**

3. **Select the Choice box and type `Average`. Click Append.**

4. **Select the Choice box and type `Improve`. Click Append.**
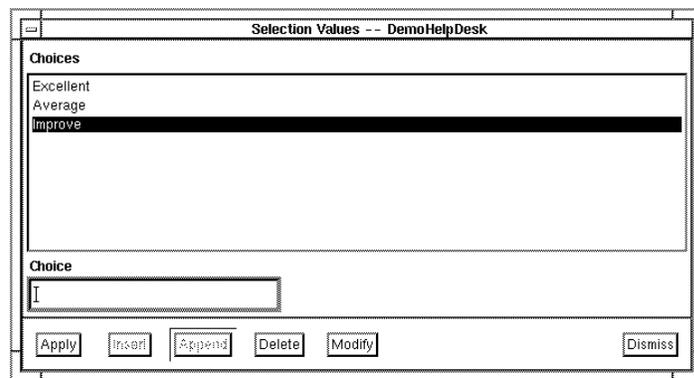
Figure 3-22 Field Selection Values

5. **Click Apply in the Selection Values dialog box to save the values for the new field.**

6. **Click Dismiss to close the Selection Values dialog box.**

To define field permissions:

1. **By default, only members of the Administrator group have access to a newly created field. Find Submitter in the Group Permissions List. Select the Change option next to Submitter to allow this group to change the value of this field.**

2. **Find Public in the Group Permissions list. Select the View option to allow everyone with access to this schema the ability to view this field.**

Note – **Field permissions** protect sensitive information. By giving Public view access to a field, you allow any AR System user to view the field's contents. In this instance, however, only the Submitter can change the field's contents. For more information on field permissions, see the *Action Request System Administrator's Guide.*

3. **Click Apply in the Field Properties dialog box to save the changes to the new field.**

4. **Click Dismiss to close the Field Properties dialog box.**

To save modifications to the schema:

1. **Click Apply in the Modify Schema window to save the changes made to the schema.**

2. **Click Dismiss to close the Modify Schema window.**

3. **Minimize the Administrator Tool.**

View the New Field

Log in to see the new field. When an administrator makes a change to any aspect of a schema, the users simply log in to retrieve the changes.

To open the DemoHelpDesk schema in the AR System User Tool.

1. **Double-click Joe's AR System User Tool icon to launch his User Tool.**

2. **Choose Open Schema from the file menu. The Open Schema dialog box appears.**

3. **From the schema list, select DemoHelpDesk, then click Apply. The DemoHelpDesk schema appears, as shown in Figure 3-23. Notice that the field you just added is displayed and usable.**

Figure 3-23 New Field on the DemoHelpDesk Schema

4. Minimize Joe's User Tool.

Section Conclusion

In this part of the demonstration, you added a new field to the DemoHelpDesk schema, without directly accessing the underlying database. You have seen:

- Through a series of point-and-click operations, you were able to add a field to a schema. No knowledge of relational databases or programming languages is required.

- The AR System offers rich control of how fields are displayed. You specified the location of the field and the field's label. The selection list is presented as radio buttons, but with the click of a button, it could be displayed as a menu.

- You can use the Administrator Tool to define additional workflow objects, such as active links, filters, and escalations. Creating and modifying these objects is as simple as creating a new field.

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Congratulations!

You have now completed a very brief overview of how you can use the AR System to automate the workflow of an internal help desk application. You have seen how users and help desk personnel can work together to resolve requests. Included with the help desk application are workflow rules and a solutions database that can enhance service quality, lead to consistent service for every request, and even reduce costs.

You worked with the desktop beeper feature, the Notification Tool. You also worked with the Administrator Tool to explore ways you can design schemas and workflow rules to meet your organization's business needs. Without any programming, you defined and added a selection field to the schema. With similar ease, you can create your own AR System applications or customize the sample schemas provided with the AR System.

Restoring the Demonstration Environment

During the workflow demonstration, you made some changes to the default demonstration environment. If you wish to start the demonstration over, or restore it for another user, follow the procedure below.

To restore the demonstration environment:

1. **Maximize the AR System Administrator Tool by double-clicking its icon.**

2. **From the Category menu, select Schemas.**

3. **Double-click DemoHelpDesk to open the DemoHelpDesk schema for modification.**

4. **Click the Customer Satisfaction field to highlight this field.**

5. **From the Edit menu, select Delete.**

6. **Click Apply.**

7. **At the warning, click Continue to delete the field.**

8. **Click Dismiss to close the schema.**

9. **Minimize the Administrator Tool.**

10. Restore the demonstration environment by running demoRestore from your `<install_dir>/demo` **directory.**

Where to Go from Here

Now that you have successfully completed the AR System Help Desk Demonstration, you can proceed to other tasks. Remedy provides some helpful products to help you understand more about the processes you would like to implement, as well as how to use the AR System to achieve these goals. This section lists some suggested directions in which to proceed to get your help desk completed.

Review the Sample Schemas Included with the AR System

The Action Request System provides a suite of sample schemas that you can review to understand process definition and implementation. For more details, see Chapter 4, Help Desk Demonstration and Sample Schemas.

Install the AR System Help Desk Templates

Your AR System package includes a CD with the AR System Help Desk Template. This template contains a group of schemas that you can use for internal help desk applications. The template includes sophisticated workflow already defined to aid in problem definition and resolution, auto assignment of tickets based on problem type, and the ability to access and modify the solutions database from the HelpDesk schema. For more information on the AR System Help Desk Template, see the accompanying *Help Desk Templates Guide for Users and Administrators.*

Start Developing Your Own HelpDesk Application

If you feel comfortable in the process definition at your site, and in your ability to create defined workflow with the AR System, you can start creating your own schemas, active links, filters and escalations with the AR System Administrator Tool. For more information regarding workflow definition and implementation, see the *Action Request System Administrator's Guide.*

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Help Desk Demonstration and Sample Schemas $4\equiv$

This chapter introduces the objects that comprise the Help Desk demonstration. The Help Desk demonstration contains numerous schemas, menus, filters, and active links. Although they provide for a good demonstration environment, it is our recommendation that you do not use the definitions included in the Help Desk demonstration as starting points for your application. The Help Desk Templates, included in your AR System package, are more suited for production development. For more information on the Help Desk Templates, see the *Help Desk Templates Guide for Users and Administrators.*

The chapter also provides a summary of the other sample schemas provided in your AR System package. These samples provide some examples of other uses for the AR System. The samples are good examples and good starting points, but are not necessarily complete production environments.

Schemas in the Help Desk Demonstration

The demonstration uses a series of schemas that are based on the Help Desk Templates. The demonstration schemas represent a scaled down version of the Help Desk Templates. For more specifics regarding the schema designs and associated workflow of the complete templates, see the *Help Desk Templates Guide for Users and Administrators.*

Schema Relationships

The diagram in Figure 4-1 shows the relationship of the schemas within the AR System workflow demonstration. The DemoHelpDesk schema is the central schema in the solution. Each of the other schemas contain information used by the DemoHelpDesk schema.

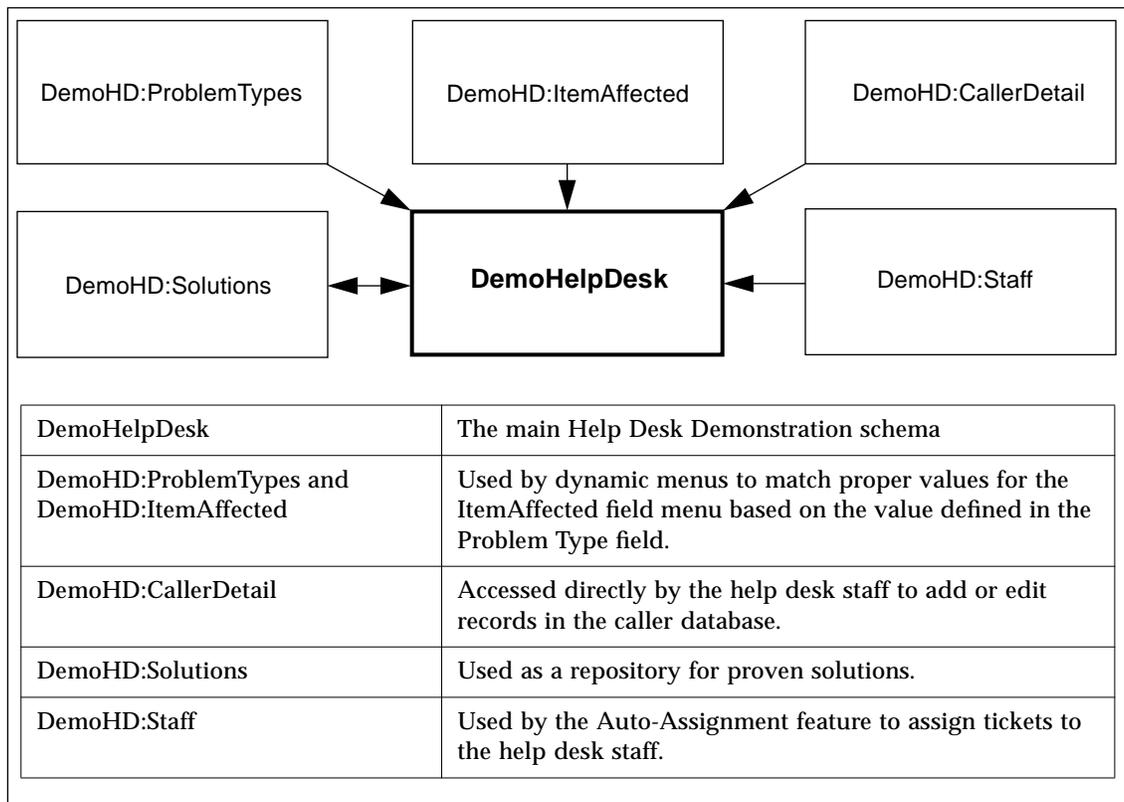| DemoHelpDesk	The main Help Desk Demonstration schema
DemoHD:ProblemTypes and DemoHD:ItemAffected	Used by dynamic menus to match proper values for the ItemAffected field menu based on the value defined in the Problem Type field.
DemoHD:CallerDetail	Accessed directly by the help desk staff to add or edit records in the caller database.
DemoHD:Solutions	Used as a repository for proven solutions.
DemoHD:Staff	Used by the Auto-Assignment feature to assign tickets to the help desk staff.

Figure 4-1   Schema Relationships

DemoHelpDesk

The DemoHelpDesk schema is the primary interface to the demonstration environment. You can access information by selecting buttons in the schema that fire active links to the other, supporting schemas. The help desk staff

members have access to the individual fields in this schema according to their access control groups. In addition, different views of the DemoHelpDesk schema have been provided for the users profiled in the demonstration.

Figure 4-2 below shows the End User view of the DemoHelpDesk schema for Windows.

Figure 4-2   End User View of DemoHelpDesk Schema

An end user would use this schema to submit open issues to the support staff for resolution. In the demonstration, Joe User submitted an entry when his web browser, Web Wanderer, was not functioning properly. To make it easier for end users to correctly fill in the fields, the administrator created an active link which fills in the Last Name and First Name fields when the user presses Return after filling in the Employee Id field. The active link queries the DemoHD:CallerInfo schema for a match of the data in the Employee Id field, then returns the data for the Last Name and First Name fields to the DemoHelpDesk schema.

Francie Frontline used this schema (with a field organization different than Joe's view of the schema) to view Joe's entry. Francie used the List My Open Calls button to view a list of the tickets assigned to her. This button is an active

link which queries all entries in the DemoHelpDesk schema with Francie Frontline in the Assigned-to field and with a value in the Status field other than Closed.

Figure 4-3 below shows the Frontline view of the DemoHelpDesk schema for Windows.
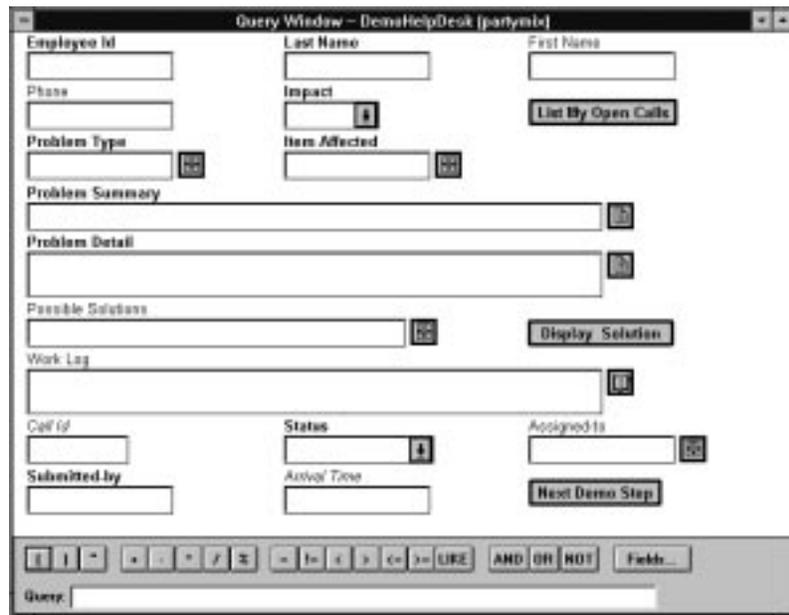
Figure 4-3   Frontline View of DemoHelpDesk Schema

Bob Backline used this schema (with a schema view different from both Joe's and Francie's) to view the call assigned to him, and enter the solution once he had resolved the problem. Once Bob entered the solution in the Possible Solutions field, end users with the same problem could use the schema to solve the problem on their own.

Figure 4-4 below shows the Backline view of the DemoHelpDesk schema for Windows.

Figure 4-4   Backline View of DemoHelpDesk Schema

Queries to the database could be based on any of the items in the field menus, or a combination of data in two or more fields. When Francie and Bob tried to resolve Joe's issue, they used this schema to query for solutions which match Joe's specific problem.

Several filters are included with this schema. When a new ticket is submitted, a filter assigns the ticket, and a second filter sends a notification to the person to whom the ticket is assigned. For example, if Francie Frontline was assigned a ticket, she would receive a notification letting her know she is responsible for resolving the problem. Whenever data is changed in the Work Log field, a filter updates the new information with the name of the person who entered the new data and the time the new data was entered.

The active links and filters were created by the AR System administrator to make resolving open issues a simple and speedy process.

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DemoHD:CallerDetail

The DemoHD:CallerDetail schema contains a profile for each potential caller. The profile data includes office number, location, department name, telephone number, fax number, pager number and PIN, email address, notification method, hotlist status, and separate logs for general customer and equipment information. The help desk administrator populates this schema with an entry for each known caller.

Figure 4-5 shows the Windows view of the DemoHD:CallerDetail schema.
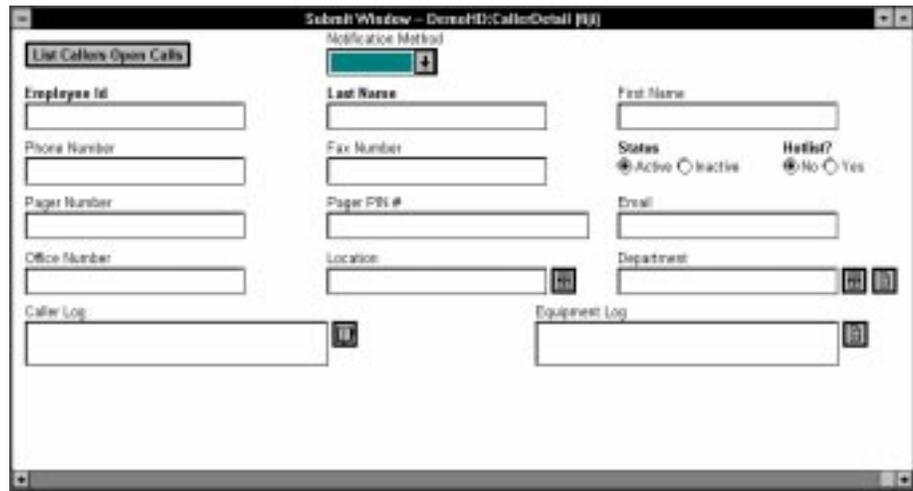
Figure 4-5   DemoHD:CallerDetail Schema

The List Callers Open Calls button is an active link which connects with the DemoHelpDesk schema to list all open calls for a specific person. In order for the active link to function, one of the following fields must be filled: Employee Id, Last Name, First Name, or Phone Number. For example, Francie Frontline may wish to know how many of Joe User's tickets have yet to be resolved. She would enter Joe's employee ID number and click List Callers Open Calls. If Joe has any open calls, they will appear as a list. If she wanted the details of the listed tickets, she would double-click one of the listed entries, and the ticket would appear in Display mode.

DemoHD:Staff

The DemoHD:Staff schema contains a profile for each member of the help desk staff. The profile information includes whether the technician is currently available to take calls, the technician's current call load (available by clicking List Open Calls), and particular skill area.

Figure 4-6 displays the DemoHD:Staff schema for Windows.
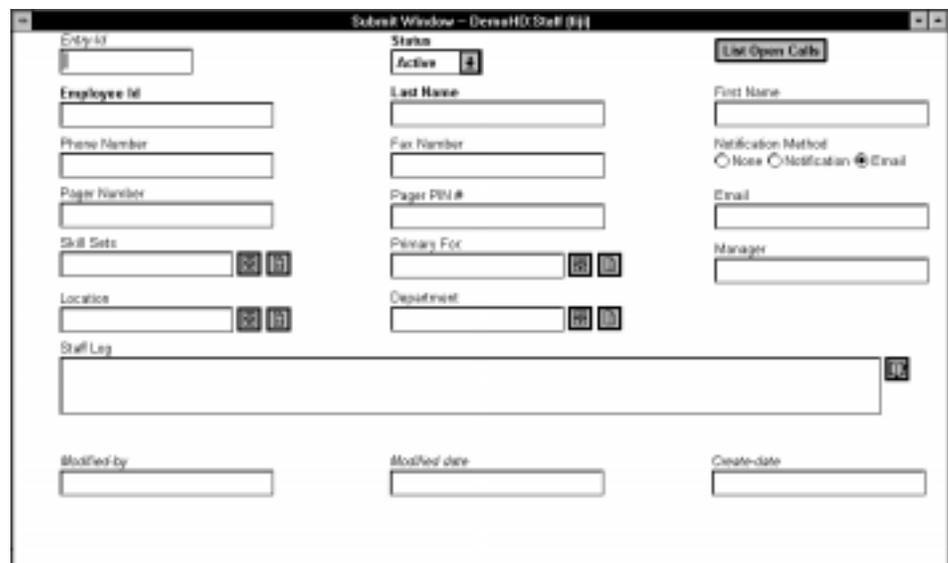
Figure 4-6   DemoHD:Staff Schema

The help desk administrator configures and maintains this data. Workflow definitions for the DemoHelpDesk schema use the information in this schema to automatically assign new calls to available backline technicians. The AR System administrator achieves this through a filter.

In the demonstration, this schema is automatically queried, and the new ticket is assigned. The workflow matches the Problem Type definition of Software to Francie Frontline's DemoHD:Staff entry, which defines her as Primary For Software. Thus, the AR System automatically notifies her when a user submits a software problem.

DemoHD:ItemAffected

The help desk administrator populates the DemoHD:ItemAffected schema with a list of secondary problem categories for each primary problem category defined in the customizable DemoHD:ProblemTypes character menu. The administrator of the demonstration environment, for example, used this schema to submit four tickets with Software in the Problem Type field. For each of these tickets, a different value was entered in the Item Affected field. For this demonstration, the values are Excel, Other, Web Browser, and Word.

A Windows view of the DemoHD:ItemAffected schema is shown in Figure 4-7.

Figure 4-7   DemoHD:ItemAffected Schema

Each entry in the DemoHD:ItemAffected schema represents a problem subcategory for the Problem Type field of the DemoHelpDesk schema. When the user selects an entry in the Problem Type field of the DemoHelpDesk schema, workflow definitions access the information in the DemoHD:ItemAffected schema to dynamically populate the Item Affected field with the list of problem subcategories associated with that Problem Type.

The demonstration uses this schema to provide data for the query type character menu that returns the software-specific selections in the Item Affected field. So, when Joe User enters Software in the Problem Type field of the DemoHelpDesk schema, the menu for the Item Affected field shows Excel, Other, Web Browser, and Word.

DemoHD:ProblemTypes

The DemoHD:ProblemTypes schema is a database of problem summaries that could apply to the combination of primary and secondary problem categories defined in the DemoHD:ItemAffected schema.

Figure 4-8 shows the Windows view of the DemoHD:ProblemTypes schema.

Figure 4-8   DemoHD:ProblemTypes Schema

The system administrator could design workflow so that the information in the DemoHD:ProblemTypes schema is used to populate the Problem Summary field in the DemoHelpDesk schema. The administrator of the demonstration environment could also design workflow that removes items from the Problem Summary field of the DemoHelpDesk schema when the Status field of the DemoHD:ProblemTypes schema is set to Obsolete.

This workflow was not included in the demonstration.

DemoHD:Solutions

The HD:Solutions schema contains profiles of known problems and their solutions. For each index of problem type, item affected, and problem summary contained in the Demo HD:Solutions schema, one or more solution profiles may be available. Each solution profile includes solution details and the solution status. Frontline technicians in this sample environment can only view current solutions.

A Windows view of the DemoHD:Solutions schema is shown in Figure 4-9.
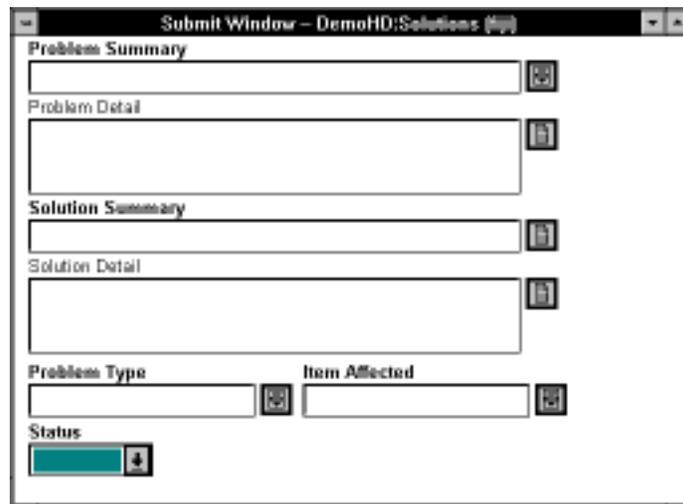
Figure 4-9   DemoHD:Solutions Schema

In the Help Desk demonstration, you can see an example of the use of this schema during Joe User's attempt to find a logical solution to his problem. When Joe clicks the menu icon of the Possible Solutions field in the DemoHelpDesk schema, the menu queries the DemoHD:Solutions schema. Only those solutions that match Joe's particular criteria (according to the data he enters in the fields of the DemoHelpDesk schema) are returned. The profile data is indexed by problem type, item affected, and problem summary. Alternatively, a keyword search can be used.

AR System Sample Schemas

The following section gives an overview of the AR System sample schemas. These schemas are provided as an example of some information you may want to track using the AR System. These schemas are merely a sample representation, and are not intended for production use. In some instances, workflow has been designed to tie schemas together, but most are standalone.

This chapter provides information on the following sample schemas:

- AR-Contact Info
- AR-Job Requisitions
- AR-Recruiting
- AR-Lunch
- AR-Messages
- AR-Sales Leads
- AR-Bug Tracking

AR-Contact Info Schema

Figure 4-10 AR-Contact Info Schema

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The AR-Contact Info schema is designed to keep track of all business contacts. If you like, you can think of this schema as a contact card file that you can query at any time. The fields to be used most often might be Last Name and Company Name, which, when used to query, would give the user all of the information on the company or contact listed.

The Status field could be used to query for only current contacts, or only those contacts no longer employed. A user could, for example, query for a list of all current contacts at a particular company by marking the Status field Active, and filling in the Company Name field with the company in question.

You could add active links to tie the information contained in the contact file directly into other schemas in the AR System. For instance, you might create an active link button on the AR-Messages schema which pulls data from the AR-Contact Info schema.

The AR-Contact Info schema shows some of the capabilities of the AR System to track and store data. In particular, this schema simulates a personal phone book (with the addition of other information as you see fit, such as Status and Contact Notes). The AR System also makes it possible for you to access this information quickly and from several other schemas. You decide how the system will work for your needs.

AR-Job Requisitions Schema

Figure 4-11   AR-Job Requisitions Schema

The AR-Job Requisitions schema, along with the AR-Recruiting schema described later, is designed to help streamline the new employee hiring process. The AR-Job Requisitions schema keeps track of open positions within a company.

When job requisitions are granted, a schema like this might be used to track how many exist in each department and how many are unfilled. As requisitions are filled, a schema like this allows you to track how many positions are staffed and when they were filled.

A sample scenario could be managers requesting new hires. The manager enters a ticket describing the position they wish to fill. The request is then automatically sent to executive management and/or the Personnel department for approval, and the hiring process begins. If the position should be filled soon, the Status field might be set to OK to Hire.

The Look up Candidates active link button ties this schema together with the AR-Recruiting schema used to track individual job candidates for a particular position. By clicking the Look up Candidates button, a user could view all of the candidates listed in the AR-Recruiting schema according to the criteria set in the AR-Job Requisitions schema.

AR-Recruiting Schema

Figure 4-12   AR-Recruiting Schema

The AR-Recruiting schema, along with the AR-Job Requisitions schema described previously, is designed to help streamline the new employee hiring process. The AR-Recruiting schema keeps track of all job candidates going through the interviewing and hiring process.

The Status and Candidate fields are the primary fields on this schema. A user might want to query for a list of all new candidates for a certain position. The user may want an update on the status of a prospective employee.

As the hiring process continues, the Interviewed by and the Comments fields are of more interest. A manager may want to check on the status of an interview, and could easily find this by querying this schema for the candidate's name. In a sample scenario, each person interviewing a candidate is able to input feedback directly into the schema. They indicate what they believe to be the relative strength of the candidate in the Vote field and can also make an entry in the Comments diary field. The hiring manager is then able to access all the relevant information about the candidate in one place, and make a well-informed hiring decision.

The Look up Position button is an active link to the AR-Job Requisitions schema. While a user is working on this schema, he may want to quickly check the status of this position. Perhaps the position has been filled, or hiring has been temporarily frozen. The active link provides a quick method of checking information between schemas.

AR-Lunch Schema

Figure 4-13   AR-Lunch Schema

The AR-Lunch schema lets you inform everyone else in the organization that it is time to eat and that you will be placing an order at a favorite restaurant.

The lunch coordinator might change the value in the Status field to Request Orders. This would fire a filter that notifies employees to open their views of the AR-Lunch schema and place their orders.

Once notified, each person can call up the schema, fill out their request, and submit their entry. End users might fill in the Item, Variety, Extras. Salsa, Jalepeño, and Cheese fields by selecting items from the attached menus.

The administrator could have a filter set to fire a notification whenever a user sets the How Hungry? field to Starvation Imminent. The lunch coordinator can query for all the newly entered orders and order lunch. The lunch coordinator might go so far as to have an escalation set to fire 20 minutes after the Status is changed to Request Orders which would query the schema and fire a macro to organize the results of the query.

Once lunch arrives, the lunch coordinator changes the Status field to Time to Eat and all the hungry submitters can be notified via a filter.

This schema shows the flexibility of the AR System. A combination of filters, active links, and escalations can ease an otherwise cumbersome process.

AR-Messages Schema

Figure 4-14 AR-Messages Schema

The AR-Messages schema provides another simple but useful example of how you can use the AR System to make your business processes run more efficiently. This schema is simply an online telephone message pad that automatically sends notifications to the party being called, via a filter, to let them know that a message is waiting for them. The person answering the call merely fills in the appropriate fields, and clicks Apply.

The person being called can then open the message directly from their Notification Tool and respond. The person who takes the message never needs to leave their desk and the person receiving the message never needs to worry about a message getting lost.

Through a schema like AR-Messages, an end user is able to search for calls according to specific criteria. For instance, an end user might want to check all messages left by a specific person or by people from a specific company. If the user did not want to delete tickets from the database, a schema like this would track all messages, serving as an electronic record.

AR-Sales Leads Schema

Figure 4-15   AR-Sales Leads Schema

This schema helps keep track of potential contacts that might result in sales of your organization's products. You can use the schema to record contacts and to track each action that you take in the process of following a sales lead. This schema is an example of how you can use the Action Request System to track and log leads during a complete sales cycle.

The AR-Sales Leads schema contains information such as the contacts for a lead, the actions to take next, and forecasting information. Queries can be performed for any combination of fields on the schema, quickly providing any needed information.

To submit a new entry, you might first enter the information on the primary contact for the lead in the fields at the top of the screen. As new information needs to be added over time, you could use the Modify Individual mode to alter the ticket.

You can use the Make New Contact active link button to create a secondary entry for an alternate contact. This would draw information from some of the fields, and automatically submit a new ticket with this information.

The List All Contacts active link button is a quick way to list all existing contacts for a specific company. The system administrator set criteria for this particular active link, so the user will only be able to fire it if a value is entered in the Company field. While this may not suit your needs, it highlights the adaptability of the AR System.

During the course of following up on a lead, a sales person can query the database for any actions they need to perform using the Today's Actions and Next 7 Days' Actions active link buttons. When fired, these active links open a list on the screen describing the tasks related to the sales leads database.

When the actions are performed, the user enters the appropriate data in the Action Type, Priority, Action Date, and Action Regarding fields, then clicks the Action Done button. This button is an active link which pulls data from the above listed fields, and logs an entry in the Action History diary field. Now, when a user queries this ticket, he will be able to quickly see what has been accomplished with this lead, and when it was accomplished.

A schema such as AR-Sales Leads would be used by several persons to query and modify tickets. A schema like this is ideal for either a single sales person or a sales team. Everyone with access to the schema would be able to see the status of the lead, and would be able to act according to the latest information.

AR-Bug Tracking Schema

Figure 4-16   AR-Bug Tracking Schema

The AR-Bug Tracking schema is designed for use during a product development cycle to help various departments within an organization keep track of defects and requests for product enhancements.

The design of the schema makes it possible for anyone to view open requests and submit new problem reports. A submitter can then track the progress of their own action request as it is acted on by the development team.

If, for example, Joe User has a problem with one of his software solutions, he would use a schema like AR-Bug Tracking to enter the information in the appropriate fields, set the value of the Status field to New, then submit the ticket.

The system administrator can create a filter that automatically routes the submitted ticket to the appropriate technician based on the data in some of the fields, say the Product, GUI, DB, OS, or Problem Area.

Once the development team has acted on the action request, either by fixing the problem, if one exists, or describing the reasons why a request is being deferred or denied, they change the value in the Status field, then notify Quality Assurance (QA). A QA technician can verify that the action taken was appropriate, and can then close the action request by changing the Status field value to Closed. The system administrator can implement a filter that automatically sends a notification to the person who submitted the bug, alerting the submitter of the fix.

At any point during the development cycle, you may generate reports that can be used as a gauge of the readiness of the product. For instance, you can make a qualified query of the database. Set the Product and Version fields to the appropriate values, set the Category field to Bug, and, in the query bar, set the Status field to have a value less than Fixed. The above sample query would return all New. Assigned, and Deferred bugs against a particular version of a product.

You could then use the Report utility to have the query data returned in any way you see fit. If you will make a query with the same qualifications many times, you can make the process even easier through the use of a macro.

This schema represents an example of how the AR System can be used to not only enable your staff to efficiently resolve product issues, but also to generate reports which are up-to-the-minute accurate and easy to generate.

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Glossary

access control

Security feature that lets you limit the access users have to specific fields within a schema and to specific functions within the system.

See also access control group, permissions.

access control group

Facility of the Action Request System used primarily to define user access to the contents of a schema field. Each group can have its own member list defining users who belong to that group. The AR System defines a number of *special* groups: Public, Administrator, Subadministrator, Customize, Submitter, Assignee, and Flashboards Administrator. You can define additional groups through the Group schema. Once you have defined a group, you can specify the type of access that the group will have to specific fields within a schema. *See also* access control, permissions.

access permissions

See permissions.

action request

AR. A collection of information that describes an event (transaction), such as a problem or a service request.

active link

A cause and effect relationship that you define on a per schema basis. Active links cause the Action Request System to perform specific operations in response to specific user actions. The AR System administrator can define active links that run macros, set fields to specified values, run independent

system processes, send an interactive message to the user, change field characteristics, or execute a DDE operation on a Windows User Tool. Active links run on the client machine.

administrator

Individual responsible for the management of the AR System, including setting up schemas, setting access rights for users, and designing the workflow process. To manage the AR System, you must be a member of the Administrator or Subadministrator group.

administrator default

Value that the administrator assigns to a field while designing the schema. When the user sets defaults, this value is used unless the user has assigned their own default. When a user submits an AR, the AR System automatically enters this value in the field unless the user has assigned their own default or has entered a different value.

administrator command

Menu extension defined by the AR System administrator using the Administrator Tool. Administrator commands allow users to invoke specific commands running on the server. (Administrator commands are not available from PC or Macintosh clients.) *See also* user command.

Administrator group

One of several special access control groups provided by the AR System. Members of this group have full and unlimited access to the AR System, including unlimited ability to create schemas, filters, escalations, active links, menus, and administrator commands. S*ee also* Subadministrator group.

Administrator Tool

The part of the AR System used exclusively by administrators (and to a lesser extent, by subadministrators) to set up the system for use by support staff and end users. This includes setting up schemas, setting access permissions (users and groups), and creating filters, escalations, active links, menus, and administrator commands.

administrator view

The layout of a schema that was designed by the AR System administrator. This is the view that users will see unless they customize their view.

admin server

The arserverd process that can handle *any* AR System operation. The admin server performs *all* admin restructuring operations, guaranteeing the serialization and integrity of data. There can be only *one* admin server process at any time.

API

Application program interface. A set of functions that provide application programmers with access to the full functionality of a product. The AR System API provides a complete interface to the AR System server.

AR

See action request.

arservtcd server

The controller server process that handles requests from clients for information on which socket to use for communicating with other server processes.

AR System client

1. Subset of AR System software necessary to allow a user to access an AR System server on the network and run the AR System tools on a local workstation.
2. Hardware (workstation, terminal, Macintosh, or PC) running the AR System client software.

AR System server

1. Full set of AR System software, including the arservtcd and the fast, list, and escalation arserverd processes. When installed on a workstation on the network, the server software provides access to the full feature set of the AR System and can be accessed by workstations, Macintoshes, terminals and PCs on the network that are running the AR System client software.
2. Hardware (workstation) running the AR System server software.

ARWeb license

Fixed or floating license that allows a user access to the ARWeb product.

assignee

The person who is assigned responsibility for resolving an action request.

Assignee group

One of several special access control groups provided by the AR System. This is an *implicit* group; users automatically belong to this group and, if they have a valid AR System license, are granted change access for ARs for which they have been assigned responsibility (their name is in the Assigned-to field).

broadcast operation

A distributed operation in which one source server simultaneously transfers data-only copies of entries to two or more target servers.

chained operation

A distributed operation in which one source server transfers an entry to a target server, and the target server in turn transfers the entry to another server. This operation is used in environments containing three or more servers.

character data type

Data type used for fields where you will be entering text. The AR System administrator can specify a maximum length for the field or leave the length unlimited. The administrator can also specify a pattern to restrict the data that users can enter or attach a character menu to the field.

character menu

A type of menu that the AR system administrator can create and attach to any character-type data field. Character menus can be displayed as list boxes or pull-right menus.

client

See AR System client.

command line options

Parameters that you can combine with the commands to start the User, Administrator, Notification, and Import Tools that allow you to specify how the tools will run. For the User Tool, you can execute a macro or open to the Query or Submit window. For the Administrator Tool, you can attach to a specific server or open the tool with a specific category displayed.

configuration

1.The process of setting up hardware and/or software so that it operates in a manner consistent with the needs of a location.

2.The physical setup of a device or devices.

3.The operating characteristics of software.

core field

One of a set of basic fields that are common to all AR System schemas. Additional limits, such as fixed or maximum sizes, are placed on some core fields.

Customize group

One of several special access control groups provided by the AR System. This group grants users the right to customize their schema layout and create custom commands in the User Tool.

database

A collection of information maintained in the form of individual entries.

data type

Property of a field that determines what type of information the field contains. The choices are character, date/time, diary, integer, real, and selection.

date/time data type

Fields with this data type are limited to calendar dates and time.

DDE

Dynamic Data Exchange. This is a standard inter-application communication feature used in Windows applications. For more information, see your Windows documentation.

default

Administrator or user defined setting or value that automatically applies to a field if users do not supply a different setting or value when submitting a new action request.

default mapping

The mapping selected by the Distributed Server Option if the AR System finds multiple mappings which apply to the specified transfer criteria.

diary data type

Fields with this data type allow you to capture a history of the actions taken for an AR. Each multiple character entry is stamped with the time, date, and name of the user who entered the item.

distributed delete

To remove an entry from the AR System. In a distributed environment, a copy of an entry may be deleted on one server if the master copy is deleted on another server.

distributed fields

Fields you can add to an AR System schema which allow you to manipulate certain mapping controls. The amount and type of fields added to a schema is determined by the mapping type selected.

distributed processes

These processes control the action that is taken when filter or escalation criteria is met within a given schema. There are three distributed processes you can select as the Run Process action in a filter or escalation: Distributed-Transfer, Distributed-Return, and Distributed-Delete.

distributed return

A distributed operation that returns the latest copy of an entry, with ownership, to the requesting server.

distributed server

An AR System server that exists within a multi-server, distributed environment.

distributed transfer

A distributed operation that sends a copy of an entry, with or without ownership, from one server to another.

distributed update

A distributed operation that refreshes a copy of an entry on one server when the master copy, on another server, is modified.

duplicate entry IDs

A condition that may occur in a distributed operation when an entry transferred from the source server has the same entry ID as an entry on the target server. The Distributed Server Option provides several options to handle this issue.

dynamic menu

Menu that performs a query at the time a user selects the menu icon and uses the results of the query to build the list of menu items from which the user chooses.

email

Electronic mail. The AR System allows you to set up an electronic mail handler so that users can submit ARs through email if they do not have access to a User Tool or if the AR server is inaccessible. (If you are running the client tools on a PC, your PC must be equipped with an SMTP gateway to allow email submissions.)

end user

In the AR System, an end user is the person who notifies support staff of problems and service requests by submitting ARs.

escalations

Facility that tests server transactions at specified times or regular intervals to see if certain conditions are met and responds to the conditions by taking a specific action or actions. The AR System administrator can define escalations to perform actions such as notify an individual, run a process, set specified fields, or make an entry to a log file.

This facility is useful if, for example, you want to notify support staff when ARs are in the Assigned state too long.

escalation server

The arserverd process that, if enabled, handles all escalation operations.

export

Facility that lets you move schemas, filters, active links, menus, administrator commands, and mail templates to a file. Exporting is useful if you want to share schemas, filters, active links, menus, and administrator commands with another server or generate mail templates.

fast server

The arserverd process that, if enabled, handles the operations that generally run to completion quickly without blocking access to the server.

extension

See user command, administrator command.

filter

Facility that tests every server transaction to see if certain conditions are met and responds to the conditions by taking a specific action or actions. The AR System administrator can define filters that set fields to specified values, run

independent system processes, send an interactive message to the user, notify the user when the state of an AR changes, or make an entry in an audit trail log file. Filters run on the server.

fixed license

Write license that is permanently assigned to a user so that the user always has access to the AR System.

See also floating license, write license.

Flashboards license

Fixed or floating license that allows a user access to the AR System Flashboards product.

floating license

Write license that exists on a server and is allocated to any user who requests a license and who is defined in the User database as having a floating license type. If no floating license is available at the time of the user request, the user must wait until a license becomes available.

See also fixed license, write license.

FTS

See full text search.

FTS license

Fixed or floating license that allows a user to perform a full text search in any large text or diary field indexed for FTS.

Full Text Search (FTS)

Facility that allows a user to quickly search for information in large text or diary fields. The fields must be indexed and FTS-enabled by the AR System administrator, and the user must have an FTS license.

group access

See group type.

Group schema

Schema that lets you add new groups, delete groups, and modify group permissions.

group type

The maximum permission type allowed for a group. May be None, View, or Change. (Note that permission may be set below the group's maximum at the field level.)

guest user

An unregistered user with a limited set of capabilities (submit ARs and possibly review those ARs). Unregistered users may not be allowed at your site.

hidden field

A field that exists but is not visible in a user's view of the schema.

import

Facility that lets you share schemas, filters, escalations, active links, menus, and administrator commands that were created on another server. First, you must export the definitions from the server on which they were created to an ASCII file, then you can import the file to your own server.

Import Tool

The part of the AR System that lets you transfer data from one server to another.

integer data type

Fields with this data type contain numeric values between -2147483648 and 2147483647. (The range for a particular field may be limited by the administrator.)

license

See Flashboards license, fixed license, floating license, FTS license, read license, write license.

list server

The arserverd process that, if enabled, handles the operations of the AR System that may take some time to complete: AR Export, ARGetListEntry (high-performance database searches), and ARGetEntryStatistics.

login window or dialog box

Window that allows you to login to the AR System when you first start an AR System tool.

macro

A set of operations recorded for later execution. Macros are useful for automating frequently used or complex query operations.

mail template

Template that contains the fields that you need to fill in to submit an action request using electronic mail. Templates are generated by the administrator from existing schema using the export facility. (If you are running the client tools on a PC, your PC must be equipped with an SMTP gateway to allow email submissions.)

mapping

The parameters for a particular distributed operation, such as To and From servers and schemas, data control issues, and field-to-field mapping definitions.

mapping history

A history tracking record created when a distributed operation occurs. This record includes the date and time of transfer, source entry ID, source schema, source server, and the name of the specific mapping used.

master copy

The copy of a distributed entry which currently has ownership.

multiple schema views

Ability of an administrator to create different *views* of what users see when they bring up a schema, including hiding or re-arranging fields by changing a field's display properties.

multi-process server

A product that allows the AR System administrator to distribute operations among different servers and, consequently, improve the performance of the AR System.

For example, the arservtcd process routes the load among the Admin server, Fast server, List server, Escalation server and Private servers as appropriate, automatically starts the specified arserverd processes and restarts the arserverd processes if they terminate.

notification

An alert that tells you that an AR System event has occurred. The alert may be a system beep, flash, the display of a notice window, or the opening of the Notification Tool.

Notification Tool

The part of the AR System that alerts you when specific changes are made to ARs. Also referred to as the Notifier.

operator

One of a number of functions that let you define complex queries or build qualifications. The AR System operators are available through use of the query bar palette or the qualification palette or you can type them in directly.

pending operation

A distributed operation that is waiting to occur. Pending operations are typically due to a specified transfer interval that has not yet been met, or because there are network or server-related problems within the distributed environment.

permissions

Property setting that allows you to control who can view and change individual fields of a schema. You also set permissions for schemas and active links. Permissions are defined for each access control group. View permission limits group members to reading the contents of a field. Change permission allows group members to read and write the contents of a field. *See also* access control group.

pick list

See selection list.

private server

An arserverd process that, if enabled, provides dedicated access to system operations for specific users.

property

An attribute that is defined. For example, the properties of a field include its data type, physical characteristics such as length, and whether it is required or optional.

Public group

One of several special access control groups provided by the AR System. Every user is automatically a member of this view only group.

pull-right menu

See character menu.

query

Process that lets you select a subset of ARs according to search criteria that you define and then perform one of several operations on the selected ARs. *See also* query operation.

query bar

that lets you define complex query criteria. Includes a palette of operators that you can use in the query you build.

query list

A list that includes a one-line summary of each AR matching a query.

query operation

Action that you can perform on the entries that match the criteria defined in a query. The possible operations are: Query List, Display, Modify, Report, and Delete.

query statement

A complete definition of query criteria constructed in the query bar.

Query window

The User Tool window that lets you search the database for ARs that match specific criteria and display the results of the search. You also use the Query window to view or modify an existing AR. *See also* Submit window.

range

Defines the upper and lower limits of acceptable values. For example, if a field's range is -10 to 100, you will be able to enter any number from negative 10 to positive 100 inclusive.

read license

License that allows a user to query the AR System schemas and submit new ARs but does *not* allow the user to modify existing ARs. *See also* write license.

real data type

Fields with this data type contain a floating-point number. The range is set by the administrator.

report format

The layout that you specify when you generate a report from an AR System query. You can format a report in columns or as a list of records. You can also choose selected fields to print or print them all. To create a more sophisticated layout, you can export the report to a file and import the file into a desktop publishing application.

reserved field

One of a set of fields defined with specific interpretations. You can use these fields in any schema, if desired.

return mapping

The specific field-to-field mappings used when an entry is returned.

row level access control

The ability to control a user's access to particular rows, or parts of rows, within AR System database tables.

schema

The definition of the data fields in a database. Each schema represents a database on an AR System server. The AR System comes with several sample schemas and you can build as many additional schemas as needed.

scroll bar

Window element that appears when there is more information to view than will fit in the window. You use the mouse to slide the scroll bar and shift the view area. A scroll bar at the bottom of the window lets you move the viewing area left and right. A scroll bar on the right side of the window lets you move the viewing area up and down.

selection data type

Fields with this data type present a set of mutually exclusive choices from which the user is to choose. The selections are displayed as radio buttons or as items on a menu.

selection list

List that appears as a result of an active link that performs a query that returns more than one AR. The selection list lets the user pick the appropriate AR so the active link can continue processing.

server

See AR System server.

status field

Core field that lets you keep a record as an AR moves through the various stages of the process you are using to resolve ARs. The defined states should reflect the workflow process.

status history

Information that shows the progress that has been made on an AR. You can view status history from the Display or Modify Individual window.

subadministrator

Individuals who have *limited* administrative access to the AR System. To be a subadministrator, you must be a member of the Subadministrator group and belong to a group with subadministrator access to a schema.

Subadministrator Group

One of several special access control groups provided by the AR System. Members of this group have *limited* access to the AR System. You must be a member of this group to be able to administer any schemas that your group has subadministrator access to and to create and administer filters, active links, and escalations connected to schemas that your group has administrative access to.

Submit window

The User Tool window that lets you enter the appropriate information to create and submit a new AR. *See also* Query window.

submitter

The person who submits an action request. The submitter's name is entered in the Submitter field.

Submitter group

One of several special access control groups provided by the AR System. This is an *implicit* group; users submitting ARs automatically belong to this group and, if they have a valid AR System license or if the Submitter Mode is set to Locked, are granted change access for ARs that are submitted with their name in the Submitter field.

support staff

Person or group responsible for resolving action requests. They assign and are assigned ARs, log their progress in appropriate fields, and use information stored in previous ARs to help resolve problems.

toolbar

that allows easy access to some of the more commonly performed functions in the Windows Administrator Tool: New Server Window, New Object, Save, Align Left, Align Right, Align Value Left, Align Value Right, Align Top, Align Bottom, and Show Grid.

transfer

A distributed operation that sends a copy of an entry, with or without ownership, from one server to another.

transfer mapping

The specific field-to-field mappings used when an entry is sent from one server to another.

user default

Value that a user who has customize permission can assign to a field. When the user sets defaults, the AR System loads this value into the field. When the user submits an AR, the AR System automatically loads this value into the field unless the user has entered a different value.

user command

Facility that allows you to invoke an operating system command (or application capable of being run from an operating system command line) from the Execute menu of the Query window. Each user can define their own set of user commands. (User commands are not available from PC or Macintosh clients.) *See also* administrator command.

User schema

Schema that lets you add users to the AR System and specify the type of access each user will have.

User Tool

The part of the AR System that lets users enter new ARs and track them through the troubleshooting process. Users can also query the database for ARs that match specified criteria, generate reports, and modify existing ARs with the User Tool.

user view

What the user sees when they bring up a schema. If users have permission to customize their views, they are able to change the physical layout and other properties of the schema and schema fields as they appear.

variable

Data element that changes according to user input. In macros, you can include variable definitions that will cause the AR System to prompt the user for certain information when the macro executes.

version

The system release number. To display the version of the AR System that you are running, select About under the Help menu in the User, Administrator, or Import Tools.

view layout

The location of fields in a user's view of a schema.

wild card

Character that you can enter to represent other characters in a query. In query statements in character and diary fields, for example, you can use wild card characters to match single characters, strings, or characters within a range or set.

write license

License that allows a user to modify and save data on existing ARs as field and schema permission settings allow. Write licenses may be either fixed (permanently attached to a single user) or floating (allocated to users as required).

See also fixed license, floating license, read license.

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