Indian Health Service
Office of Information Technology

User Guide HEAT v8.4

Version 1.0

October 2008

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DOCUMENT APPROVAL

This user guide has been approved for distribution and implementation. These new procedures are effective immediately and will be enforced. Requests for corrections or changes to this document should be sent to the IHS OIT.

Approved by:

_____ _____

Dr. Theresa Cullen, CIO IHS Date

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DOCUMENT INFORMATION

This document provides information regarding the use of HEAT software version 8.4.

Change History

Version	Date	Modified By	Comments
1.0	01-Oct-08	Teagan Geneviene	Initial release of document

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1.0 Introduction

HEAT tickets, also referred to as call records, provide a complete record of a problem, service request, or change request from a customer. In addition it links each ticket with the customer's profile to easily reference the contact information and call history for the customer. The combination of ticket and customer history makes HEAT a very valuable tool for reports and analyzing past tickets.

This document addresses two components of HEAT:

- **Call Logging:** The HEAT application used to create, assign, track, and close tickets.
- **Alert Monitor:** The HEAT application use to alert technicians when a ticket needs their attention.

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2.0 Heat Tickets Overview

2.1 When to Create a HEAT Ticket

HEAT tickets should always be created for customers that report a problem, request a service, or request a change. HEAT tickets should also be created when you want a record of a request and its fulfillment; or a problem and its solution.

- In general, you should create a HEAT ticket when the request for service is on a non-recurring basis.
- Always create a HEAT ticket for change requests – regardless of the source. Change Management provides additional details concerning changes and customer notification requirements.
- HEAT tickets do not need to be created when the customer is internal to OIT and the action resulting from the ticket is part of your daily duties. For instance, if you regularly create backups of a server you would not need to create a ticket. However if you receive a special request to create a one-time backup from a customer (including in OIT), creating a HEAT ticket would be appropriate.
- If you regularly provide system support to customers outside of OIT as part of your job description, then when you provide similar support to a member of OIT you should create a HEAT ticket. For example, resetting a customer's password.
- HEAT tickets are normally not created for analysis, research, or project management tasks. The rationale is that the immediate impact is not normally apparent to the customer.

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2.2 HEAT Ticket Lifecycle

While the assignments and actions for each ticket will be unique, each HEAT ticket will have a common lifecycle as shown in the following illustration.

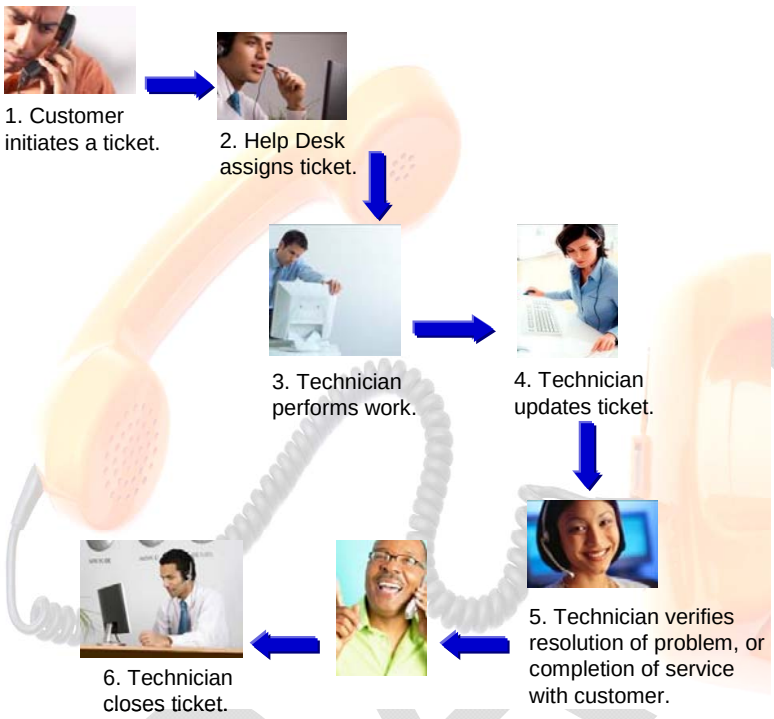

Figure 2-1: Flowchart of ticket lifecycle

1. A request from a customer to solve an Information Technology (IT) or telecommunications problem, or to provide a service, initiates a ticket. This request is either made directly to the OIT Help Desk or submitted by the customer using the Help Self Service (HSS) web interface.

2. Regardless of how the ticket is initiated, the OIT Help Desk reviews the ticket and makes the appropriate assignment.

   - If the help desk analyst is able to resolve the problem or request, the ticket is assigned to the help desk analyst.
   - If specific technical expertise is required, the help desk analyst assigns the ticket to the appropriate technician or office in OIT.
   - If the ticket is the responsibility of another unit's IT support staff and that unit does not use HEAT, the help desk will forward the request to the unit using e-mail, close the ticket, and notify the customer of the change in assignment.

3. Upon receipt of a ticket assignment, the technician must "acknowledge" the ticket within four hours of the assignment. *Alert*

Monitor is a very useful tool to notify the technician when a new ticket is assigned. The technician then performs the requested actions. If applicable, the technician may create additional assignments if not able to resolve the ticket or service request alone.

4. The technician updates the ticket to document the completed actions.

5. Once the problem is resolved or the service request fulfilled, the technician contacts the customer to confirm the resolution, preferably by phone. If unable to make contact with the customer by phone the technician should contact the customer via e-mail and document each contact attempt in a journal entry.

6. The ticket is closed by the last technician to complete their assignment.

7. If the customer receives IT support from the OIT, he or she will receive an e-mail when the ticket is closed. The e-mail states that the ticket has been closed and tells the customer what to do if the problem has not been resolved satisfactorily.

Customer Quality Survey
For 20% of these closed OIT tickets, a *Customer Quality Survey* request is e-mailed rather than the standard notice. The customer has the opportunity to rate OIT's quality of service and timeliness. All comments are reviewed by the OIT Help Desk. In all cases, when the customer does not agree that the problem was resolved or service provided, the OIT Help Desk will reopen the ticket.

Please refer to technical note *Help Desk Ticket Escalation Procedures* for additional information on the proper handling of tickets.

2.3 Mandatory Fields

When a ticket is created or closed, HEAT checks the ticket's contents to make sure that all required fields and assignment have been completed. If not, HEAT identifies which fields still need to be completed. Required fields are denoted by an asterisk (*****).

2.4 Key Field Definitions

It is especially important that the following fields on the *Call Log* tab in Call Logging are completed correctly for performance measuring purposes and to ensure that the tickets are resolved most expeditiously. See the following table.

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Field Name	Definition
Call Type	The general nature of the problem. Options include *Change*, *Problem*, *Critical Problem*, and *Service*.
System	What is impacted? There are two simple options: *Hardware* or *Software*.
Category	Category refers to a more specific description of the hardware or software that is impacted by the issue.
Sub-Category	An even more specific description of the issue. Options differ, depending on the *Category* selected above. *RPMS SW*, *NPIRS*, *E-mail* are only a few of the options.
Status	The current status of the ticket in HEAT. • **Open:** A ticket that is either being actively worked or needs to be worked. • **Closed:** A ticket that has been resolved and no further action is required from any HEAT technician. • **Monitoring:** A ticket that is believed to be resolved, but the technician wants to monitor it for awhile to check the effectiveness of the ticket's resolution before closing the ticket. • **Deferred:** A ticket where further action must wait for another action that is not eminent. • **Reopened:** A ticket that was previously closed and later found not be resolved. The original ticket is reopened to be worked for a final resolution.
Source	The source that best describes how the customer requested a service or change, or reported a problem. • **E-mail:** The ticket is created based on the receipt of an e-mail from a customer. • **Fax:** The ticket is created based on the receipt of a fax from a customer (e.g., an account request form). • **HSS:** The ticket is generated automatically by the HEAT server when a customer creates a ticket using the *Help Self Service* web interface. • **In person:** The ticket is created when a customer makes a request or reports a problem in person to a HEAT tracker or technician. An in person request often occurs when a customer alerts a technician to a new problem/request while the technician is at the customer's site working on another problem/request. • **Phone:** The ticket is created when a customer makes a request or reports a problem over the phone to a HEAT tracker or technician. • **Self:** When a ticket is created by the customer for himself/herself via *Call Logging*. • **System Monitor:** The ticket is created in response to an alert issued by a system monitor. • **Voice Mail:** The ticket is created based on the receipt of a voice mail from a customer.
Owner	The IT support staff that services specific Indian Health Service units. Assign the ticket owner based on the customer's unit not their location. • Units supported by OIT are listed on HEAT at http://www.ihs.gov/OIT/helpdesk/support • If in doubt, choose OIT and the OIT Help Desk will reassign the ticket as appropriate.

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2.5 Requesting HEAT Accounts and Training

To request a HEAT user account or HEAT training, open a HEAT ticket. This can be done by contacting the OIT Help Desk by the following means:

- Phone: 505.248.4371 or 888.830.7280
- Submit a service ticket using Help Self Service at www.ihs.gov/helpdesk
- E-mail a request to the Help Desk at www.ihs.gov/helpdesk
- E-mail a request to the Help Desk at support@ihs.gov
- Have someone with HEAT access create a ticket on your behalf.

For new accounts, the request should include the name of the account holder, unit, and the HEAT assignment group. If known, also list the alert monitor groups in which the account holder will need membership. The request should also state that the *HEAT Client* be installed on the technician's computer at the same time.

2.6 Requesting Changes to HEAT

The OIT Help Desk is interested in hearing any ideas you may have to make HEAT better or easier for yourself and others to use. Please create a HEAT ticket to submit your suggestion to OIT User Support (IHS). Submit the following:

- Service ticket for requests to create a new *Alert Call Group*, create or modify a new report, request a new "Quick Call", or adding new functionality for a subset of HEAT users.
- Change ticket for requests to add values to existing pick lists; add new fields, or any other changes to the existing screens used by all HEAT technicians.

For both types of tickets, include in the description the need that is driving your request.

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3.0 Installing the HEAT Client

Navigate to the following file share: \\npaheat01\Install Files\HEAT.

Run: ***ODBCWizard.exe***

3.1 Installation Types

This manual focuses on installation via use of the HEAT Open Database Connectivity (ODBC) Wizard. However, HEAT may also be installed by other means as described in the following section.

Two installation types are available as follows:

Administrative Installation: Creates an image of the HEAT installer (usually on a shared network drive) from which end users can install to their local workstations. Running the End-User installation using an administrative image also simplifies future upgrades and patches.

> **Important:** An Administrative installation makes an exact copy of the HEAT installer on the network location you specify.

End-User Installation: Installs program files to an end user's workstation. (Users have the option of selecting either a Typical or Custom installation.) You can run this type of installation from either an administrative image on a shared network drive.

3.2 Setup Types

Two setup types are available for End-User installations:

Typical: Installs HEAT's most common features, including Call Logging, and Alert Monitor.

Custom: Allows the user to select specific modules and features for installation. The default installation of HEAT installs all features typical for a system administrator and/or manager.

3.3 Tips for Administrative Installations

Exit all programs running on your system. This frees memory and alleviates potential conflicts between the installer and other software on your computer.

Install HEAT to a shared network drive. This installs an administrative image of HEAT to a shared location.

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> **Note:** You must have Microsoft Windows Installer Service installed on your server in order to distribute HEAT to workstations by way of your server. If the HEAT installer does not find this program, it installs it. The installer prompts you for a reboot, if required.

3.3.1 License HEAT

Licensing registers HEAT and its numerous modules. Licensing is conducted through the Administrator module.

3.3.2 Quick Start Wizard

Configure your HEAT Database using *Quick Start Wizard*. Quick Start Wizard is a tool that helps first-time HEAT administrators initially customize a database to meet OIT's specific needs. The wizard helps create things such as Call Types, Configuration Types, and fields.

3.3.3 HEAT ODBC Wizard

Use the HEAT Open Database Connectivity (ODBC) Wizard. You can distribute your ODBC data source for use on an end user's computer by using the HEAT ODBC Wizard (located on the HEAT Installation CD).

> **Note:** The HEAT ODBC Wizard does not map drives or perform driver-specific configurations. If your data source requires any special system configuration, this should be resolved before you install HEAT.

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4.0 Alert Monitor: Step-by-Step Instructions

Alert Monitor is a separate HEAT software application from *Call Logging*. It serves as a notification and monitoring tool for both technicians and managers.

Call Groups
Tickets are managed in Alert Monitor through the use of *Call Groups*. Call Groups identify tickets with similar attributes – such as all open tickets assigned to a particular technician. Call Groups also control when you want to be notified of a new ticket that meets the call group's criteria. For example, send a notification when a new ticket is added to the call group.

Technicians must be logged into Alert Monitor to receive the notifications. OIT recommends that all HEAT users either keep Alert Monitor open or minimized on their computer's desktop whenever they are using their computer.

4.1 Login Steps

To login to alert monitor:

1. Double click the Alert Monitor icon on your desktop.

Figure 3-1: Sample of Alert Monitor icon

2. If your HEAT account does not match your Active Directory (AD) account ID, or if do not have an AD account, you will have to enter your HEAT User ID and Password as shown in the following screenshot.

3. If your HEAT account does not match your AD account ID, or if do not have an AD account, contact the OIT Help Desk to have your HEAT ID modified to match your AD account ID.

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4.2 Open a Ticket

4.2.1 Steps

Take the following steps to open a ticket from within *Alert Monitor*.

1. Select a call group from the dropdown box. For example *All Active Calls* appears in the dropdown box in the following example. See *Call Group Details*.

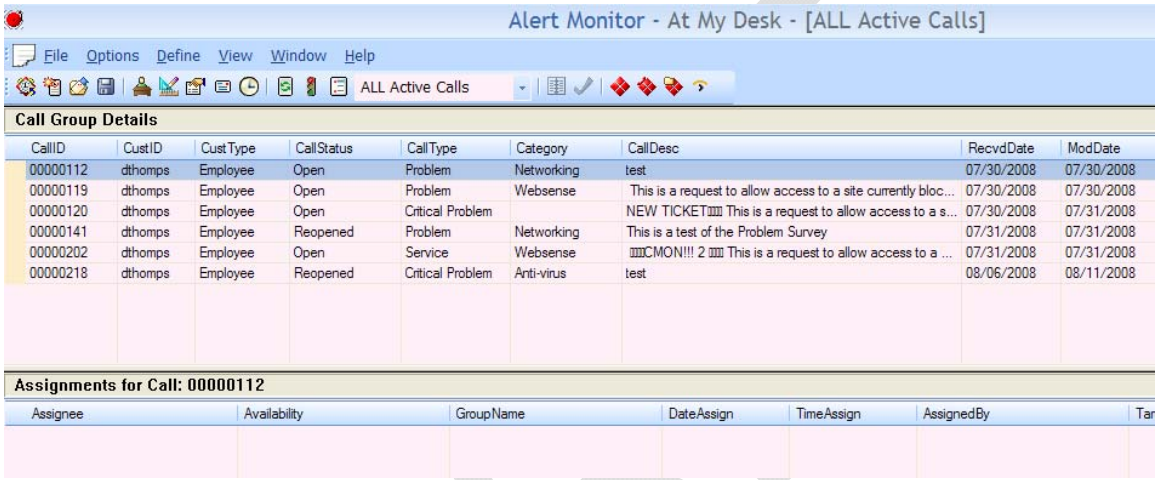

Figure 3-3: Sample of using Alert Monitor

2. Double click the *call record* for the ticket you wish to open.

The ticket opens in the HEAT Call Logging window. See the following screenshot.

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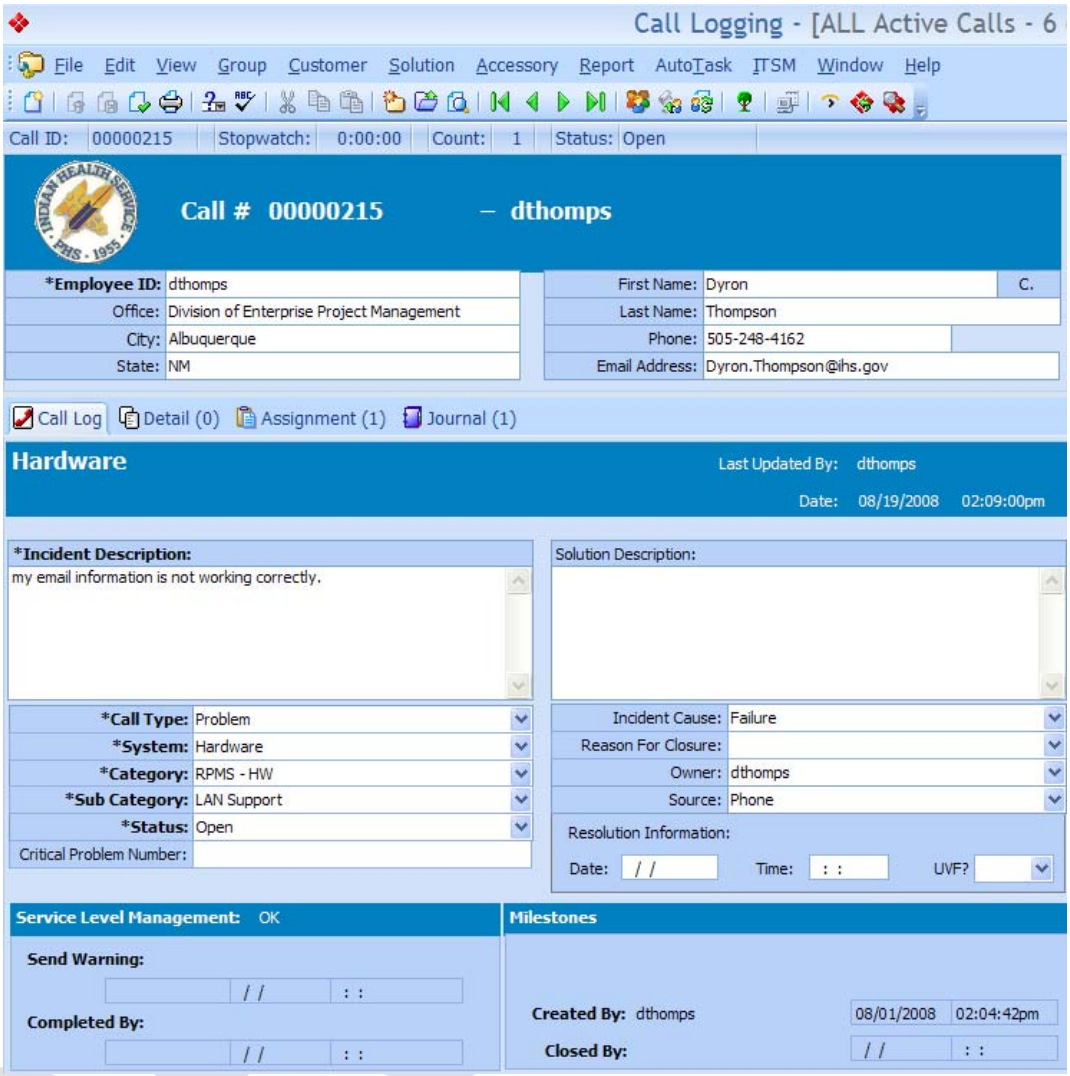

Figure 3-4: Sample of a call record

4.2.2 HEAT Technician Minimum Call Group Requirements

We recommended that each HEAT technician have at a minimum the following call groups:

- Open critical problems
- Open assigned to them – set to generate alerts when calls/tickets are added
- Open assigned to their group
- Unacknowledged assigned to them – set to generate alerts when calls/tickets are added
- Unacknowledged assigned to their group (team)

4.3 View Assignments

From within the Alert Monitor you may view all the active and completed assignments for an individual ticket.

4.3.1 Steps

To view the assignments for a ticket:

1. Click the ticket, located in the upper pane, for which you want to view the assignments.

2. The selected ticket's assignments appear in the lower pane.

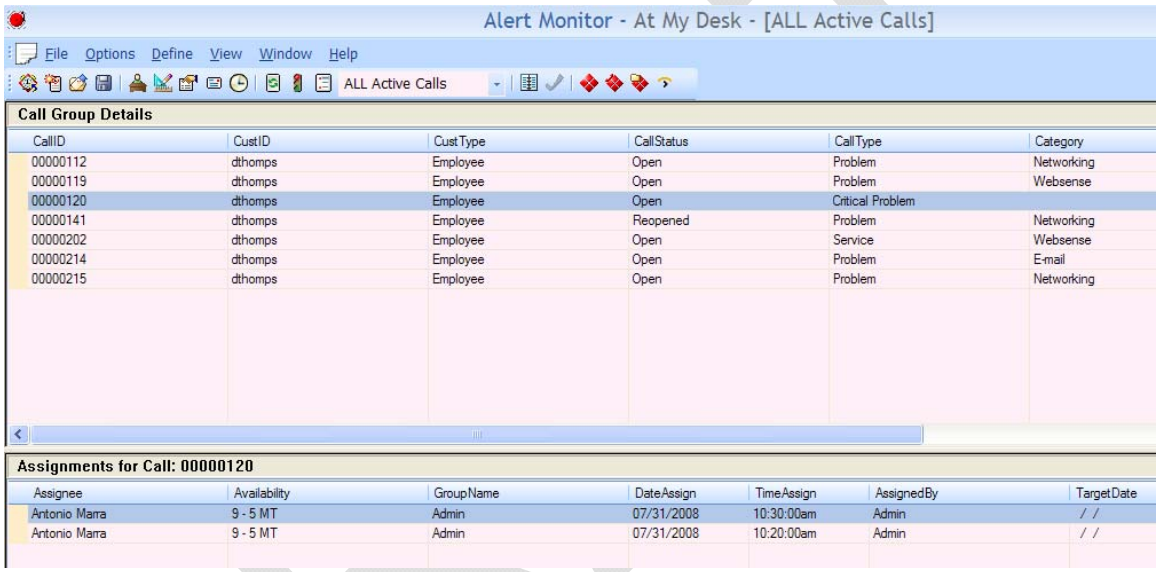

Figure 3-5: Sample of viewing ticket assignments

3. To view additional assignment details, scroll to the right.

4. To change the sort order, click the column heading to toggle between ascending and descending order.

5. To resize the columns, move the mouse over the column heading division lines until its shape turns into a double-headed arrow. Click and drag the division line to resize the column.

To save your column resizing, you must click the *Save* icon shown following. This only saves the columns for the selected alert group. To change the column widths in your other alert groups, repeat the column resizing for each of them individually.

Figure 3-6: Sample of Save icon

4.4 Open Call Logging

For steps on how to open a specific ticket in Call Logging from within the Alert Monitor, please refer to the *Open a Ticket* section of this document.

To Open Call Logging from within Alert Monitor use the following steps.

4.4.1 Steps

1. Click on the Launch Call Logging icon, as shown following.

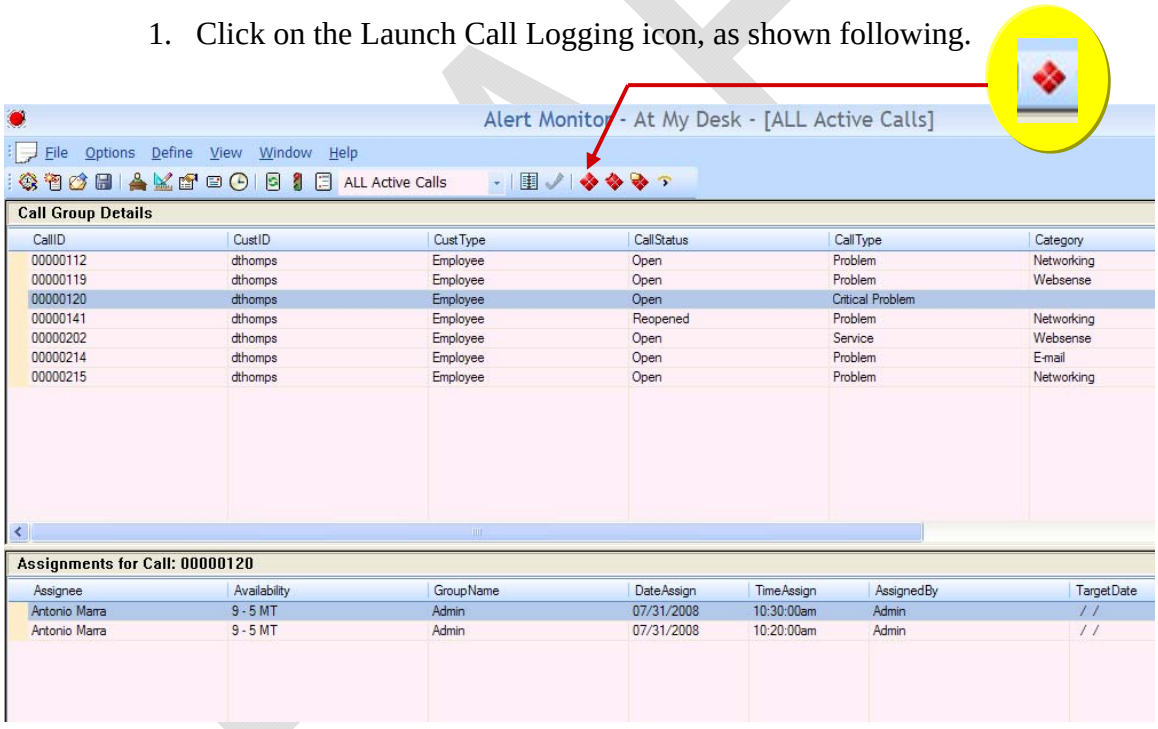

Figure 3-7: Sample of launching call logging

2. *Call Logging* appears in a new window.

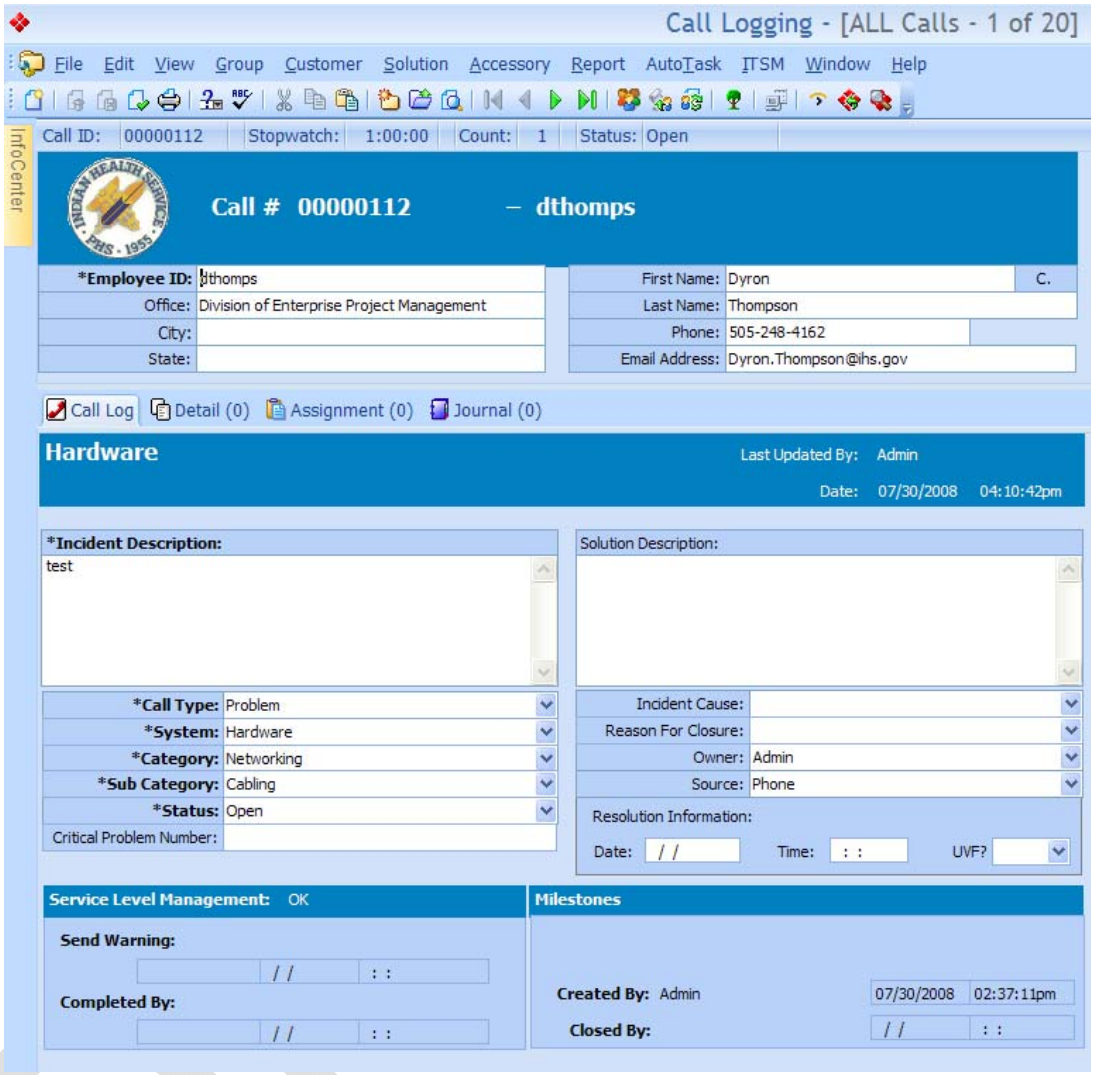

Figure 3-8: Sample of window displaying call logging

4.5 View Journal Summary

From within the Alert Monitor you may view a summary of the journal entries created for a specific ticket. Please note that if you want to see the complete journal entry, you will need to open the ticket in Call Logging. (Double click the ticket number to open the ticket in Call Logging.)

4.5.1 Steps

To view the journal summary for a ticket take the following steps:

1. Click the ticket located in the upper pane for which you want to view the journal summary. See Figure 3-8 shown previously.

2. From the menu bar, select **View > Journals**.

3. A summary of all the journal entries appears.

4. *To view the journal entry text*, scroll to the right to see the first part of the journal entry.

5. *To change the sort order*, click the column heading to toggle between ascending and descending order.

6. *To print the journal summary*, click the **Print** button. Be sure to change the paper layout to "landscape" in the print dialog box.

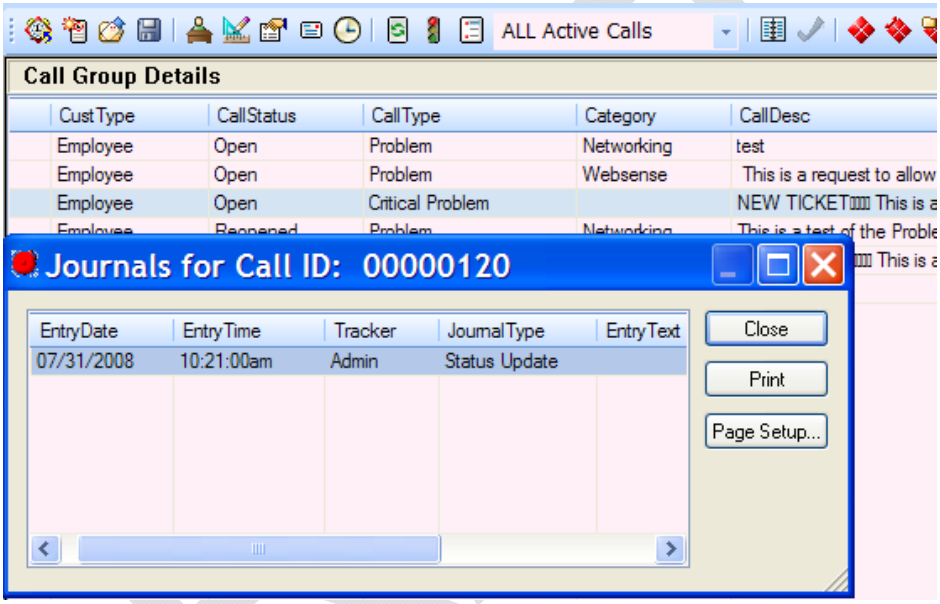

Figure 3-9: Sample of journal window

4.6 Call Groups Overview

Call Groups put together tickets with similar attributes – such as all open tickets assigned to a particular technician. Call Groups also control when you want to be notified of a new ticket that meets the call group's criteria. Most likely when your HEAT account was created, default call groups were assigned to your login account.

There are three categories of Call Groups as follows:

Personal
Call groups that you create for your use only. They are private and cannot be shared with other HEAT technicians.

Team
Call groups that were setup for use by HEAT technicians that belong to the same HEAT Group.

Global
Call groups for use by all technicians.

4.7 Add an Existing Call Group

When you log into Alert Monitor, it automatically opens the call groups saved in your profile. You may add an existing Call Group (one that was previously defined by you or the HEAT system administrator) to your profile.

4.7.1 Steps

To add an existing call group, take the following steps:

1. Click the **Start/Stop Polling** icon to stop the polling for new tickets. Polling must be turned off while working with call groups.

Figure 3-10: Sample of Start/Stop Polling icon

When polling is *on* many of the menu and toolbar options are grayed out, as shown in the following example.

Figure 3-11: Sample of tool bar with unavailable options

2. Click the **Define call group alerts** icon.

Figure 3-12: Sample of Define call group alerts icon

A window opens displaying your currently selected call groups.

3. Click the **New** button.

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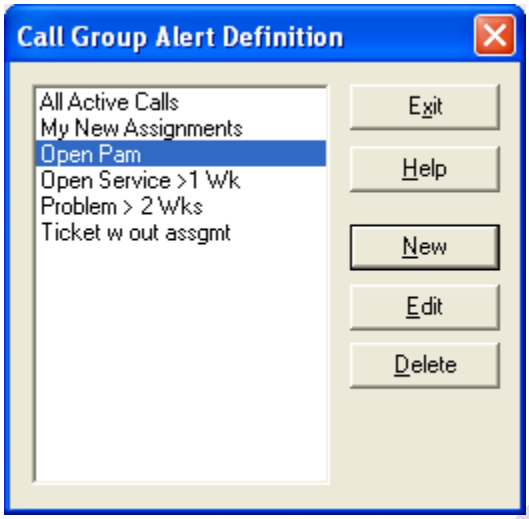

Figure 3-13: Sample of window displaying currently selected call groups

4. The *Define Call Group Alert* window appears. Click the **Browse** button.

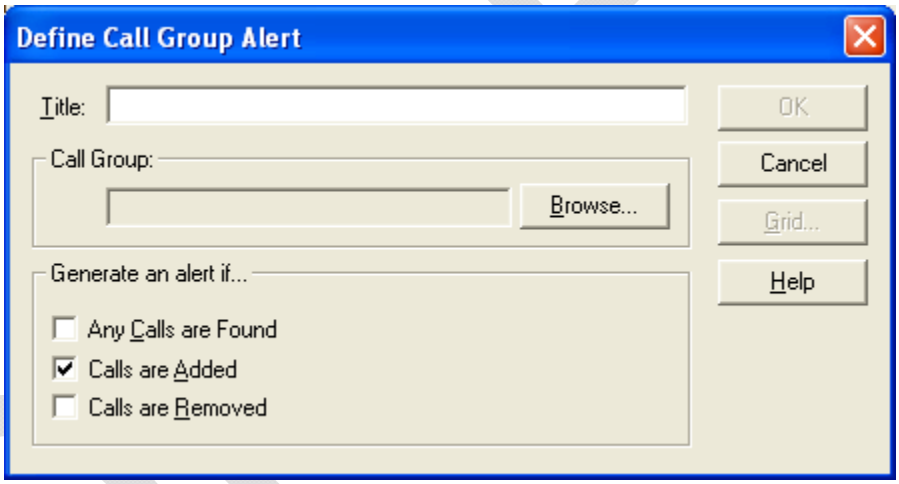

Figure 3-14: Sample of window showing Browse button

5. Select the radio button corresponding to the type of Call Groups you wish to browse, as shown in the next example. These options include the following:

   - **Personal**: Call groups you created for yourself. Please note that you will only see your own alert groups.
   - **Team**: Call groups created by the HEAT System Administrator specifically for your team (HEAT Group) members.

- **Global**: Call groups created by the HEAT System Administrator available to all HEAT users. Please note that if a call group will be used by more than one team, it must be stored at the global level.

- **All:** All of the above.

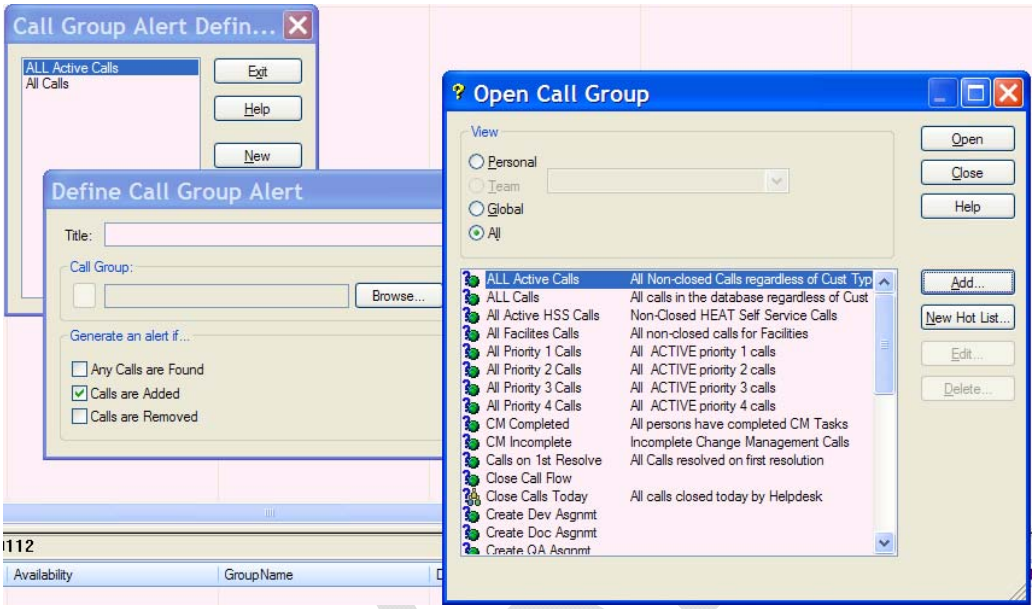

Figure 3-15: Sample of window showing call groups that can be browsed

6. Click the name of the call group you want to add your profile.

7. Click the **Open** button. You will be taken back to the *Define Call Group Alert* window.

8. The Define Call Group Alert window allows you to choose when to *Generate an alert if….* Select one of the three options provided by clicking the check-box as shown in the following example. You may choose:

   - Any Calls are Found
   - Calls are Added
   - Calls are Removed

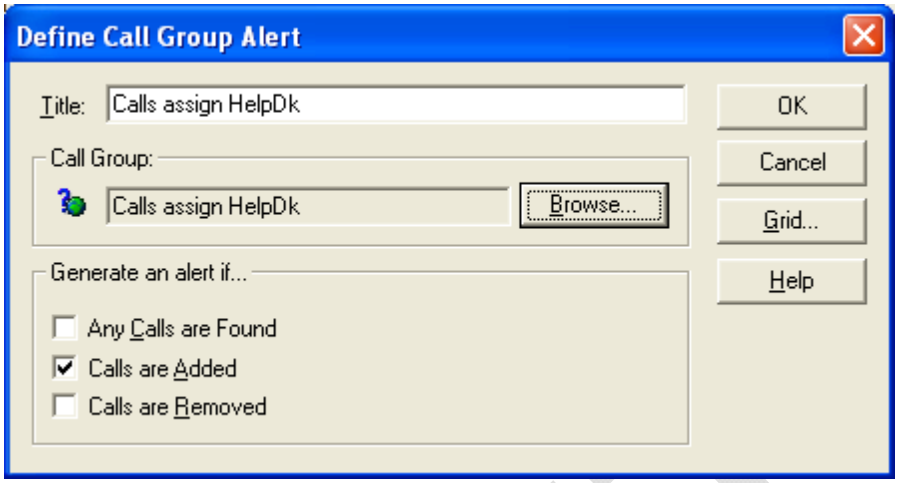

Figure 3-16: Sample of screen used to define a call group alert

9. Click the **OK** button.

10. Click the **Exit** button.

11. Click the **Save** icon.

12. Click the **Start/Stop Polling** (traffic signal) icon to turn on polling.

4.8 Change a Call Group's Alerts or Display Preferences

Call Groups may be customized to match your preferences. At any time, you may change:

- When you want to be notified of a change in your call group
- The type of information displayed about each ticket in your call group (the grid layout)

These changes only affect your display – not anyone else's. You may therefore change any personal, team, or global call group preference.

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4.8.1 Steps

To change a call group's preferences, take the following steps:

1. Click the **Start/Stop Polling** icon to stop the polling for new tickets. Polling must be turned off while working with call groups.

Figure 3-17: Sample of Start/Stop Polling icon

Remember – when polling is on many of the menu and toolbar options are grayed out.

2. Click the **Define call group alerts** icon.

Figure 3-18: Sample of Define call group alerts icon

3. Click the alert group you want to edit. See the following example.

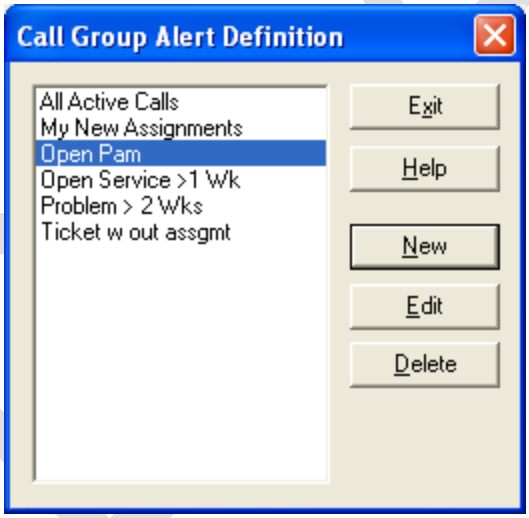

Figure 3-19: Sample of choosing an alert group for editing

4. Click the **Edit** button.

5. Choose when you want to be notified of a change to the call group from the **Generate an alert if** options.

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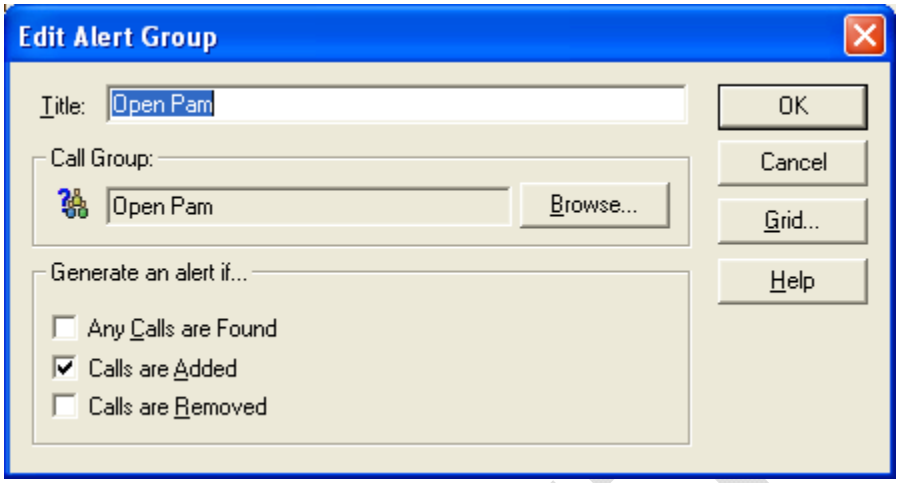

Figure 3-20: Sample of alert notification options

6. To change the summary information that is displayed in the *Call Group* window, click the **Grid** button.

7. The *Grid Definition* window appears. To add a field, click the field's name in the *Available Fields* column then click the **Add** button. See the following example.

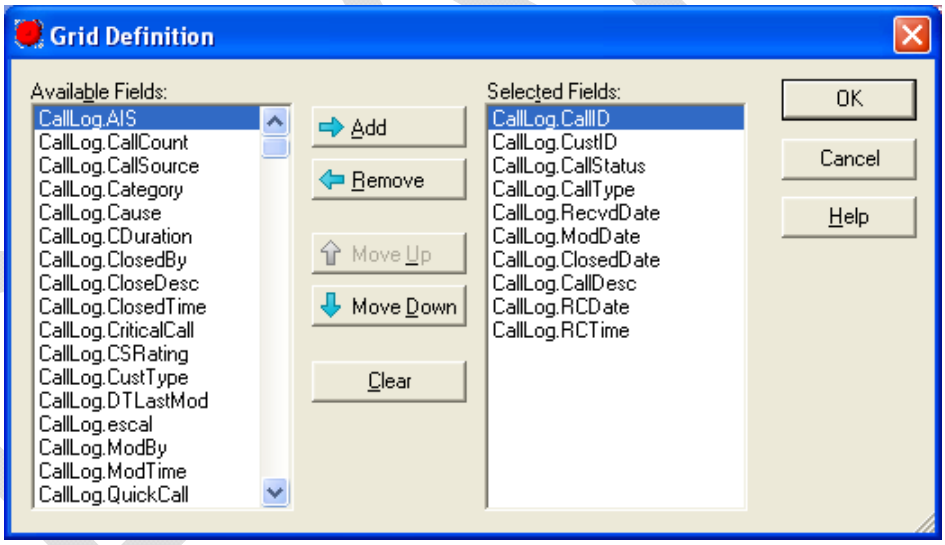

Figure 3-21: Sample of Grid Definition screen

8. To remove a field, click the field's name in the Selected Fields column then click the **Remove** button.

9. To change the order of the selected fields, click the field you want to move. Then click either the **Move Up** or **Move Down** button to reposition the field.

10. When you have finished making your changes in the Grid Definition window, click the **OK** button.

11. Click the **Save** icon.

12. Click the **Start/Stop Polling** (traffic signal) icon to turn polling on again.

4.9 Create a New Personal Call Group

The instructions below show how to create a Personal Call Group. Personal call groups are private and cannot be shared with other HEAT technicians.

If you need a Global or Team Call Group created, contact the OIT Help Desk or create a ticket to request this service. Global and Team Call Groups may only be created the HEAT System Administrator.

When you create a Personal Call Group, you are actually using Boolean logic. If you already understand that, you will recognize it in the steps described in this section. Just follow the steps provided. If you need additional information or would prefer to have the HEAT System Administrator create your personal call group, then contact the OIT Help Desk for assistance.

4.9.1 Steps

To create a new call group, take the following steps:

1. Click the **Start/Stop Polling** icon to stop the polling for new tickets. Polling must be turned off while working with call groups.

Figure 3-22: Sample of Start/Stop Polling icon

Remember – when polling is on many of the menu and toolbar options are grayed out.

2. Click the **Define call group alerts** icon.

Figure 3-23: Sample of Define call group alerts icon

3. Click the **New** button. See the following example.

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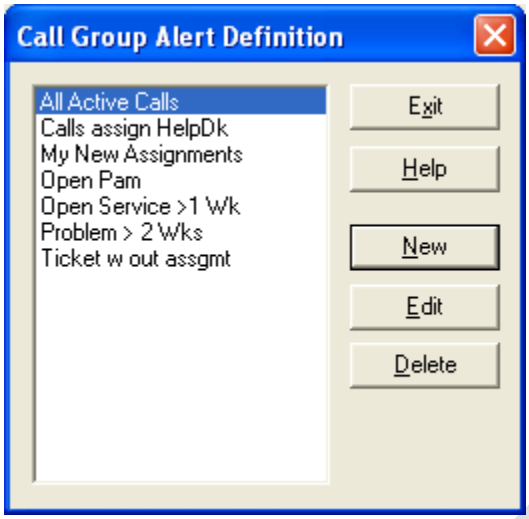

Figure 3-24: Sample of screen used to create a new call group

4. The *Define Call Group Alert* window appears. Click the **Browse** button as shown in the following screenshot.

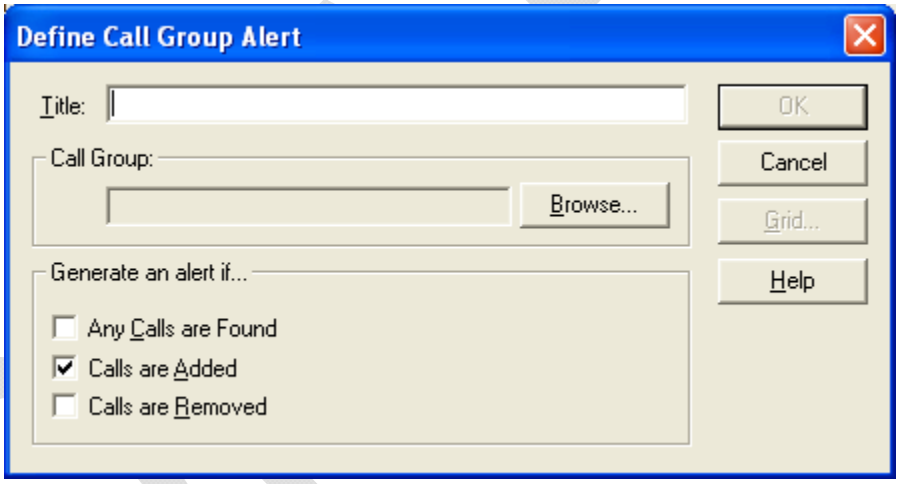

Figure 3-25: Sample of screen used to create a new call group

5. The *Open Call Group* window appears. Click the **Add** button, as shown in the following example.

Figure 3-26: Sample of screen used to create a new call group

6. In the *Name* box, type the name of your Call Group. It can be called anything you want.

7. In the *Description* box, type a brief description of the Call Group.

8. Click the **Personal** radio button. See the following example.

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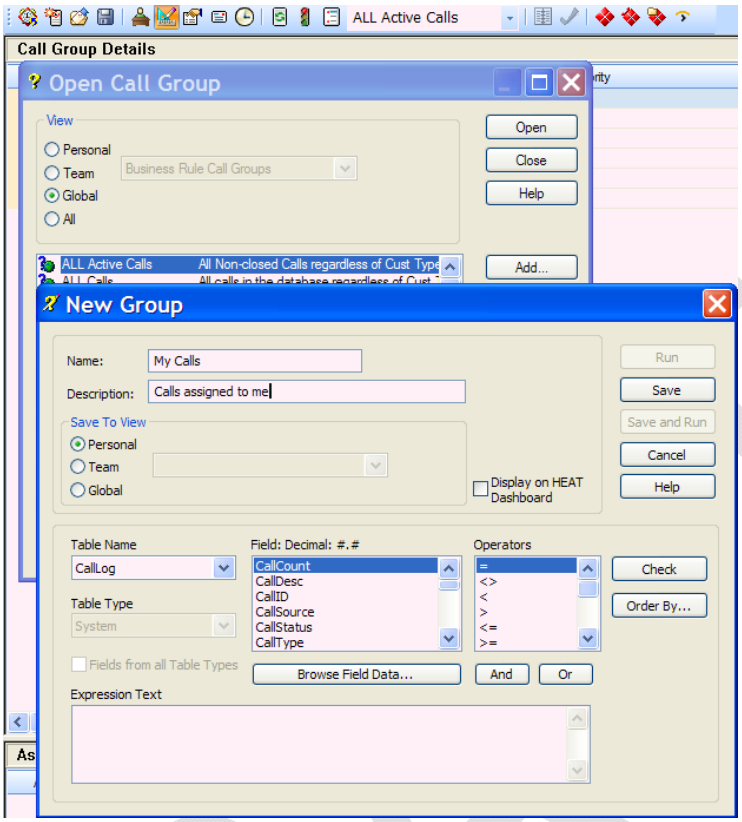

Figure 3-27: Sample of entering new group information

9. The next step involves defining the criteria (expression text) that the tickets must meet to appear in the new call group. Boolean logic is used to create the criteria for determining which tickets should appear in the call group. Following is a short primer. If you need additional help, then click the **Help** button or contact the OIT Help Desk for additional assistance.

   - **Table Name:** Displays the HEAT tables (generally the tabs displayed on a ticket) and @functions (e.g., the @current date) available for use. When you select a table, the available fields for that table appear in the *Field* list.

   - **Field Text:** Displays the fields available in the selected table.

   - **Operators:** Operators are used to define the condition the selected field must meet. Note the information in the following table.

Operators and Definitions			
=	Equal to	**<>**	Not equal to
<	Less than	**>**	Greater than
<=	Less than or equal to	**>=**	Greater than or equal to
Is empty	Nothing is entered in the field	**Is not empty**	Anything is entered in the field
Is null	Nothing is entered in the field	**Is not null**	Anything is entered in the field
Like	Contains the specified value anywhere in the field		

Figure 3-28: Table of operators and definitions

10. To create an expression:

- Choose a table containing the field you want to add to the expression. See the example of the *New Group* window in the previous example (Figure 3-27). On the left side of the *New Group* window, find *Table Name*. Use the dropdown box to select a table.
- Double click the field containing the table you want to use. It will appear in the expression box.
- Double click an *operator*. It will appear in the expression box.
- Either click the **Browse Field Data** button, or type in a value to complete the expression. See the following example.

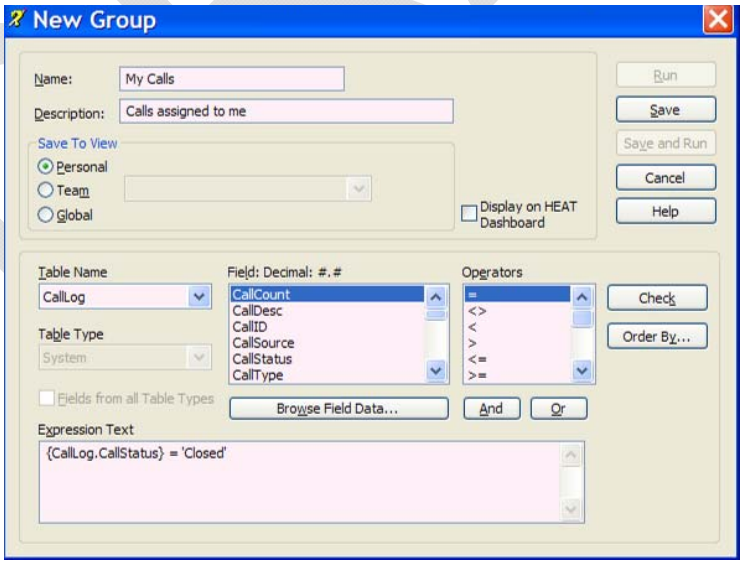

Figure 3-29: Sample of screen used to create an expression

If you click the Browse Field Data button the *Validate from Status* window appears. Select the expression you want to use and click **OK**. You will be taken back to the *New Group* window.

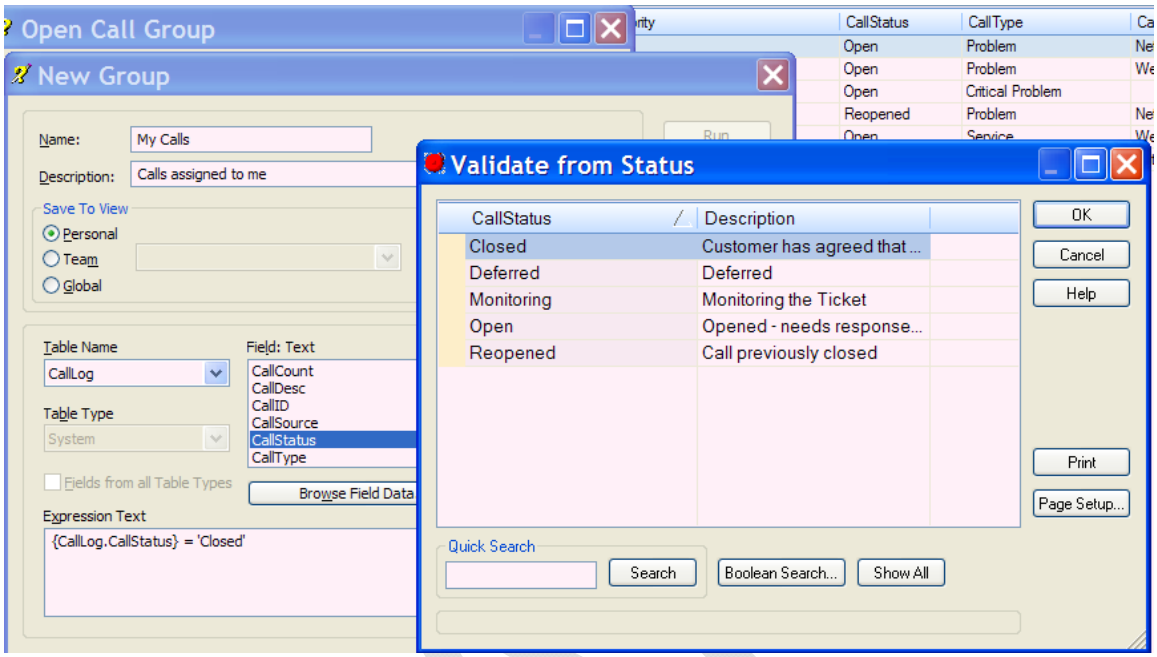

Figure 3-30: Sample of browsing field data to select an expression

11. If there will be more than one condition, click either the **And** or **Or** button to connect multiple conditions together, and repeat the step above until your expression is complete.

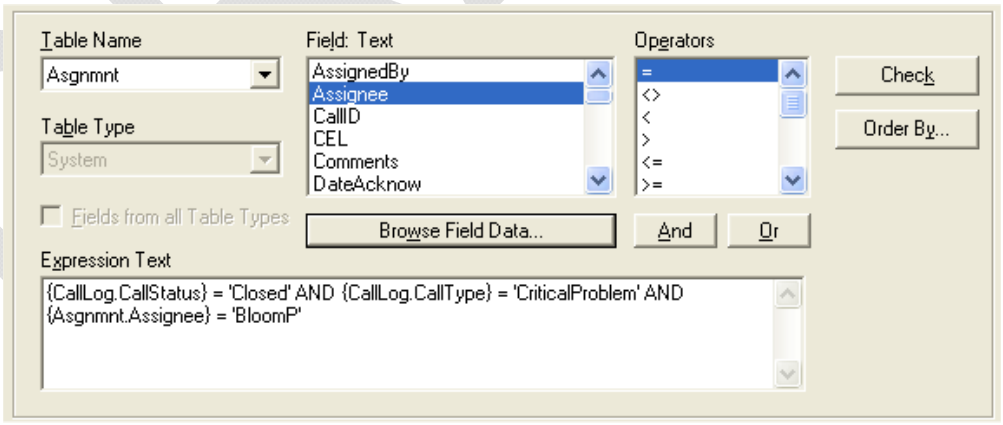

Figure 3-31: Sample of adding conditions

12. Click the **Check** button on the right side of the screen to verify that your expression will work. If it does not work, you will receive an error message pointing out what needs to be corrected.

Note: It is *very important* that you click the **Check** button and correct any errors. If you save a personal alert group with an error, your Alert Monitor may crash.

13. Click the **Order By** button to choose how the results should be displayed in the call group.

14. Click the first field by which you want to sort the results and the radio button for either *Ascending* or *Descending* order.

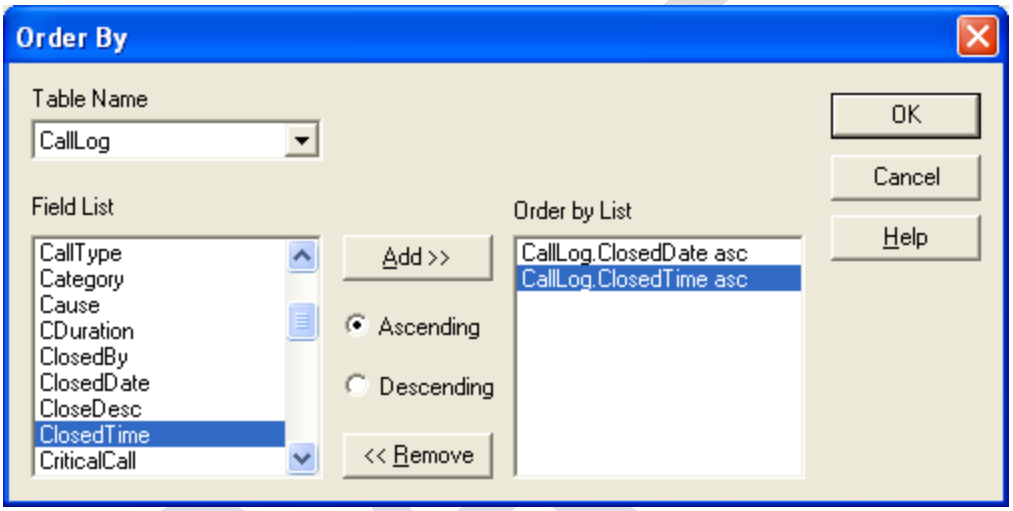

Figure 3-32: Sample of screen used to select order

15. Click the **Add >>** button, as shown in the example above.

16. Repeat the above two steps to add additional sorts. The second sort will sort the list within the first sort's order, and so on.

    If you need to remove an "order by" parameter, highlight it and click the **<<Remove** button. To change the sort order, remove the entire contents of the "Order by List" and add them back in the correct order.

17. Click the **OK** button.

18. Click the **Save** button to save your new call group.

    You have completed creating the call group, but now need to add it to your list of open call groups.

19. Click the name of the call group you just created.

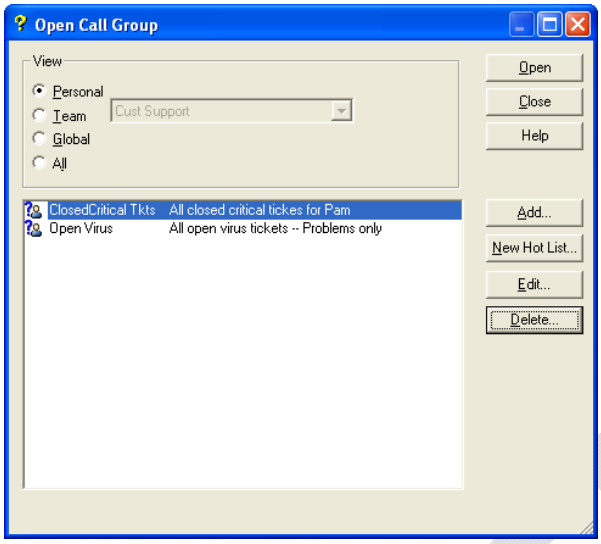

Figure 3-33: Sample of call group window

20. Click the **Open** button as shown in the above screenshot.

21. In the boxes below the *Generate an alert if…* prompt, choose from:

    - Any Calls are Found
    - Calls are Added
    - Calls are Removed

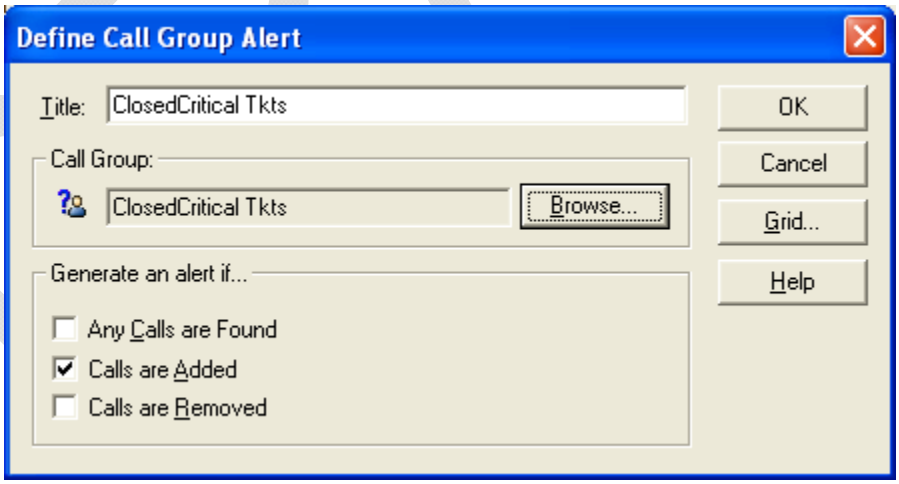

Figure 3-34: Sample of generating call group alerts

22. Click the **OK** button.

23. Click the **Exit** button. A window for your new Call Group opens automatically.

24. Click the **Save** icon. This saves the new call group to your list of open call group alerts.

25. Click the **Start/Stop Polling** (traffic signal) icon to turn polling on again.

4.10 Change an Existing Call Group's Selection Criteria

The following instructions show how to change a *Personal Call Group*.

If you need a change made to a Global or Team Call Group, contact the OIT Help Desk, or create a ticket to request this service. In most instances, the OIT Help Desk will create a similar call group thereby preserving the existing call group for other HEAT technicians.

4.10.1 Steps

To edit an existing call group, take the following steps:

1. Click the **Start/Stop Polling** (traffic signal) icon to stop the polling for new tickets. Polling must be turned off while working with call groups.

   Remember – when polling is on many of the menu and toolbar options are grayed out, as shown in the following example.

2. Click the **Define call group alerts** icon.

Figure 3-35: Sample of Define call group alerts icon

3. The *Call Group Alert Definitions* window appears. Click the **Edit** button.

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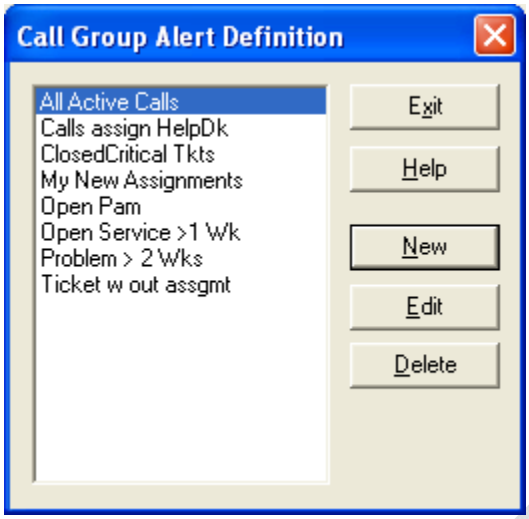


Figure 3-36: Sample of screen used to edit an existing call group

4. The *Edit Alert Group* window appears. Click the **Browse…** button.

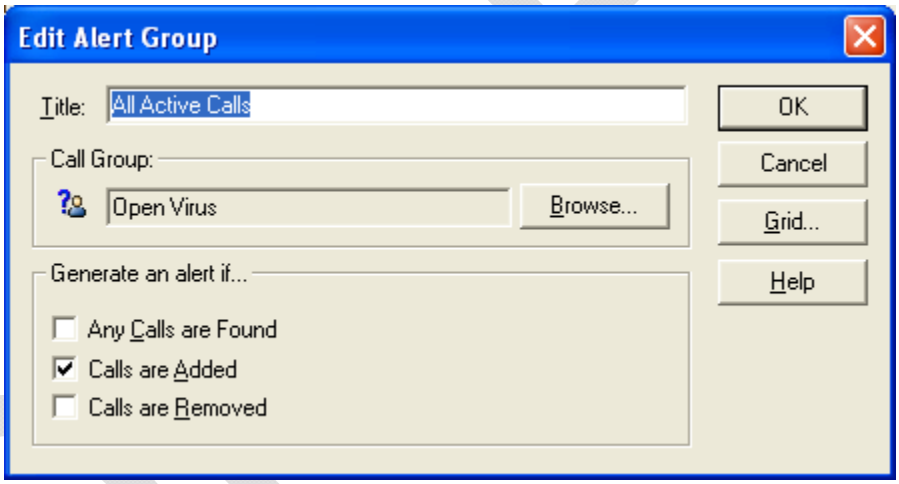


Figure 3-37: Sample of screen used to edit an existing call group

5. The *Open Call Group* window appears. Click the **Personal** radio button then click the name of the call group you will be editing.

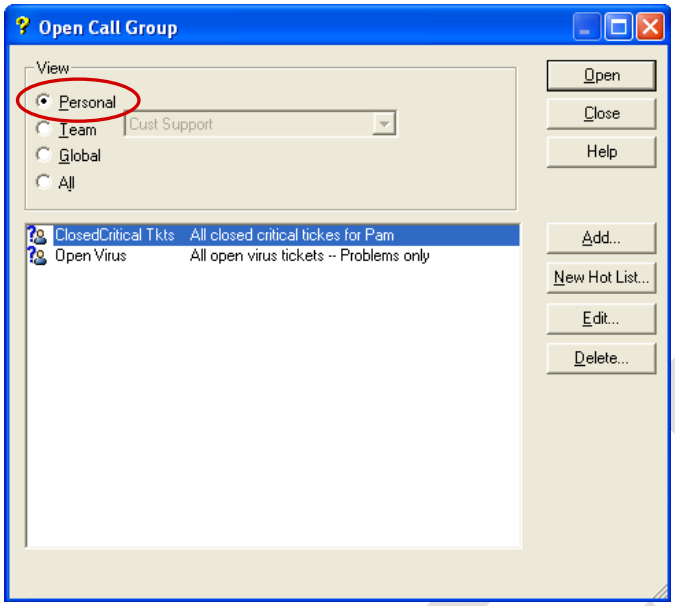
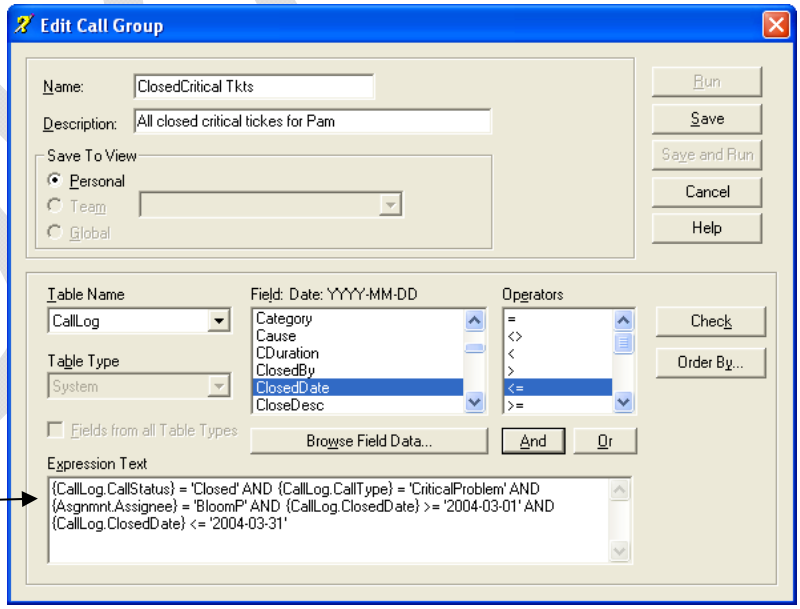


Figure 3-38: Sample of selecting the group to be edited

6. Click the **Edit…** button.

7. Make the necessary changes to the Call Group:

   - **Name:** You can name a Call Group anything you want.
   - **Description**: Type a brief description of the Call Group.



This box defines the conditions that must be met for a ticket to appear in the Call Group.

Figure 3-39: Sample of editing call group

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8. To edit the expression text, you may either:

    - Edit the text directly in the expression box.
    - Or, place the cursor in the Expression Text box where you want to begin your edits and follow the steps as described in "Create a New Personal Call Group."

9. Click the **Check** button to verify that your new expression will work. If not, you will receive an error message pointing out what needs to be corrected.

10. To change the sort order of the results, click the **Order By…** button, to change how the results should be displayed in the call group.

    - To add a field, click the field you want to sort the results by and the radio button for either *Ascending* or *Descending* order. Then click the **Add >>** button.
    - To remove a field, click the field you want to remove. Then click the **<<Remove** button.
    - To change the order of the sort, you will need to remove all the "Order by List" entries and add them back in the correct order.

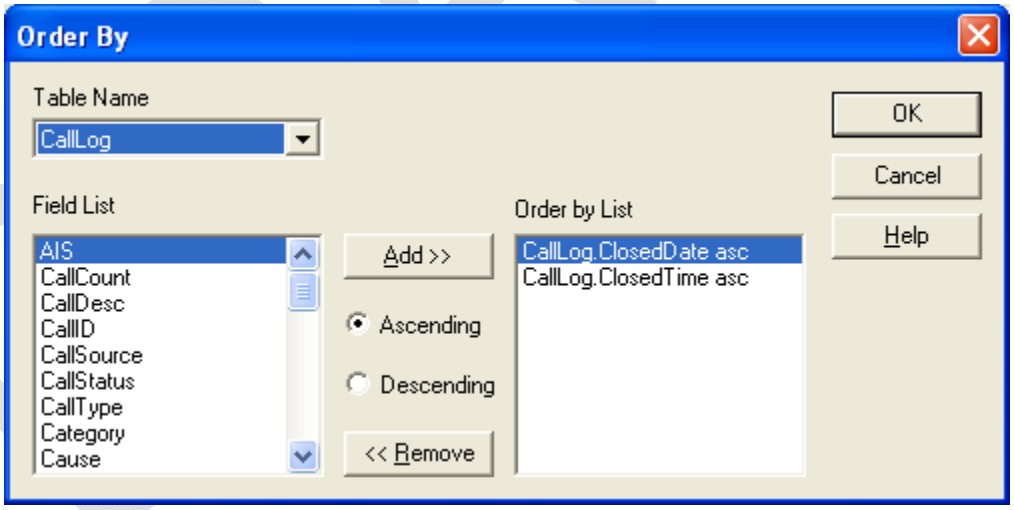

Figure 3-40: Sample of changing the sort order

11. If you changed the sort order, click the **OK** button.

12. Click the **Save** button to save the changes you just made to the call group.

13. Click the **Close** button.

14. Click the **OK** button.

15. Click the **Exit** button.

16. Click on the Save icon, as shown in the following example

17. Click the **Start/Stop Polling** (traffic signal) icon to turn polling back on.

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5.0 Call Logging: Step-by-Step Instructions

This section provides information about Call Logging.

5.1 Login

Use the instructions in this section to login to the HEAT Service and Support system.

5.1.1 Steps

To login to Call Logging, take the following steps:

1. Double click the Call Logging icon.

2. If you have an Active Directory network account, you should not have to log in. If your HEAT account does not match your AD account ID, or if do not have an AD account, you will have to enter your HEAT User ID and Password as shown below. If your HEAT ID doesn't match your Active Directory ID contact the OIT Help Desk to have your HEAT ID modified to match your AD account ID.

Figure 4-1: Sample of logon screen

6.0 The Dashboard

HEAT will open by default to the "Dashboard" utility. The Dashboard can also display information from *Broadcasts* (messages that impact HEAT users).

Using the tabs in the lower section of the screen, technicians can have a quick overall view of different aspects of their work:

- Active Incidents by Priority
- Active Incidents by Call Type
- Total Calls by Month

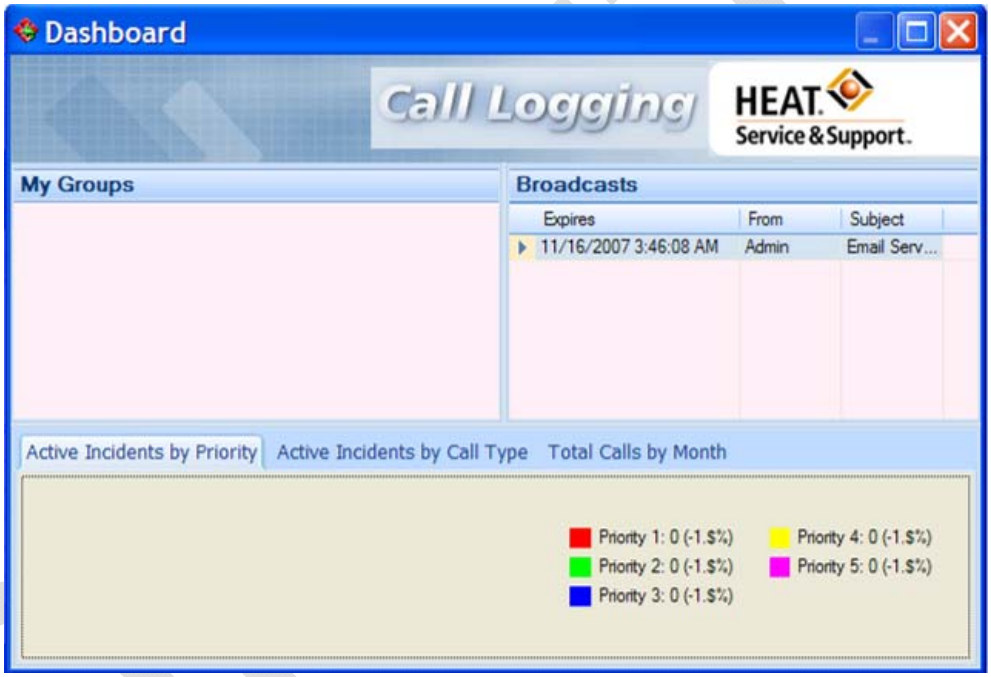

Figure 5-1: Sample of dashboard screen

After you have logged into Call Logging, you may have the Dashboard show, or close it as you choose. See the following example.

To open *or* close the Dashboard, go to the menu bar and click **View > Dashboard**.

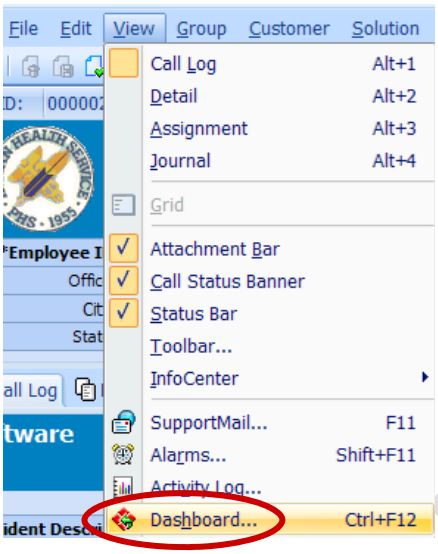

Figure 5-2: Sample of opening or closing dashboard

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7.0 Tickets: Step-by-Step Instructions

HEAT tickets, or call records, are created from within Call Logging. A HEAT ticket consists of four parts: Call Log, Detail, Assignment, and Journal. Before a ticket can be saved, essential information must be entered in the Call Log, Detail, and Assignment sections. Journal entries are optional, but encouraged because important information about the ticket and actions taken can be posted in a journal. A ticket can have multiple journals. The instructions below are a step by step guide to creating and saving a HEAT ticket.

> **Note:** Customers may also create their own tickets using the Help Self Service (HSS) web interface. While HSS is very similar to HEAT's Call Logging, it does not have all the functionality of Call Logging. It is mentioned here for informational purposes and will not be covered any further in this document.

7.1 Steps to Create a Ticket

To create a ticket, take the following steps:

1. If in Alert Monitor, click the Launch Call Logging icon.

Figure 6-1: Sample of Launch Call Logging icon

2. The *Call Logging* window appears. From the menu bar, select **File > New Call Record** – or click the *New Call Record* icon.

Figure 6-2: Sample of New Call Record icon

3. Type the customer's Last Name in the *Last Name* field, and then click in any other field.

   - If there is more than one customer in the HEAT database with the same last name, the *Validate from Profile* window will open. Choose the correct customer name and click the **OK** button.

   - If the customer is not listed in the HEAT database, the Validate from Profile window appears listing all available customer profiles. If you cannot find a match, contact the OIT Help Desk and ask them to create the customer's profile. The customer's profile must be created before you can continue with the ticket's creation.

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- Otherwise, the customer's information defaults from the customer's profile. Verify the customer's information to ensure that the correct customer profile was defaulted.

4. Confirm the customer's Office, Phone, and E-mail Address. Update them as required by clicking the Customer Profile icon shown following, or use the **F5** key.

Figure 6-3: Sample of Customer Profile icon

5. When you select the customer, a history of the customer's calls will appear.

6. If a call history did not appear, then go to the customer's call history to see if there is already an open ticket for this problem or service request.

   - Click the **Caller History** icon.

Figure 6-4: Sample of Caller History icon

   - If there is an existing ticket, either update the ticket (or reopen it) or abandon this ticket. Otherwise proceed with the next step.

   - Close the Customer window to return to the call record.

7. Choose the appropriate *Call Type* by clicking the dropdown arrow by that field. The majority of the calls will either be a call type of "Service" or "Problem." See the following table for more information.

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Call Type	For …
Service	• A customer requested modification that impacts a limited number, typically 10 or fewer, customers. • Examples: – Moving desktop workstations – Creating Novell accounts – Loading software – Creating a web page – Provision of cellular phones or Blackberries
Problem	• Any unplanned outages, loss of functionality, or malfunctions in the software or hardware of an existing system. • Impacts one customer or has a minor impact on multiple customers. • Examples: – Can't print to a network printer – Can't access e-mail or the network – Software doesn't work properly – Web page link is broken
Change	• Planned modification to production hardware or software that impacts/supports a significant number of customers – typically more than 10. • Examples: – Upgrading servers – Installing software to an entire Indian Health Service unit – Maintenance of network routers
Critical Problem	• Unplanned outage or major loss of functionality of production system(s) impacting multiple customers. • The initial ticket created for a critical problem will have a call type of "Critical Problem." If other customers call with the same problem, each of their tickets will have a call type of "Problem" cross-referencing the critical problem ticket.

Figure 6-5: Table of call types and definitions

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Note: Once you choose a call type, it should only be changed if the initial call type was incorrectly selected.

For example when a ticket is created with a call type of "Critical Problem," you should change its call type to "Problem" if you later discover that there is already another Critical Problem ticket addressing the same problem.

Whereas, you should not change a Call Type for example from a "Critical Problem" to a "Problem" just to keep the ticket open while confirming the effectiveness of the resolution. The correct action for this scenario would be to change the Call Status to "Monitoring", and to enter the Resolution Information Date and Time as of when the technician believes the ticket was resolved.

8. On the *Call Log* tab, the *Call Status* field is at the lower left of the screen. It defaults to "Open." Accept the default.

9. Complete the remaining fields as shown in the following example.

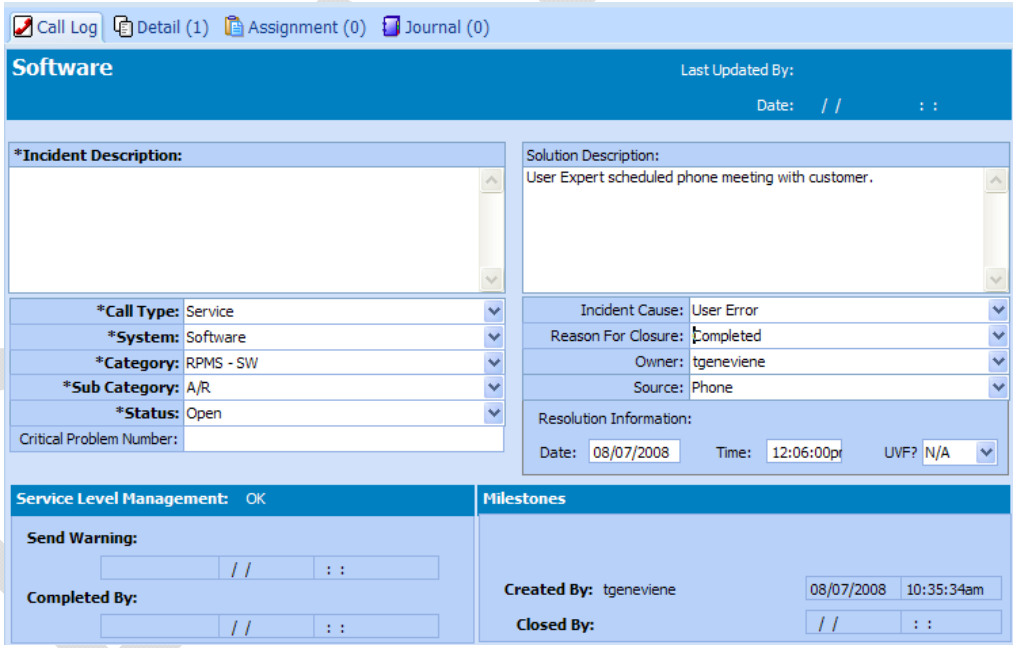

Figure 6-6: Sample of Call Log tab in a new ticket created in Call Logging

Additional information is provided in the following table.

Field	Value
Source	Choose the source that best describes how the customer requested a service or change, or reported a problem. Please note you normally would not choose either "ATG" or "HSS." Both of these are for system generated tickets received by e-mail or from Help Self Service, respectively.
Select Support Center responsible for Customer's Organization	Choose according to the organization to which the customer belongs. *Do not make assumptions based on the customer's location.* For instance not all customers in the National Museum of Natural History are members of NMNH. If you are not sure, choose "OIT".
Description of Problem/Request	Enter a detailed description of the problem or service requested. Please do not repeat the customer's name, call date and time in this field as the information is captured elsewhere in the ticket. • *(Change Tickets Only)* Create a journal entry by selecting the "**Change Ticket Information**" quick journal entry and answering the related questions.

Figure 6-7: Table of fields and values

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10. Click the **Detail** tab and complete the information. The Detail tab's contents vary based on the ticket's Call Type. It is used for all call types except "Problem." The following table provides additional information.

Call Type	Fields
Service	• **Service Type.** Choose the most appropriate. • **Service Sub Type.** Choose the most appropriate. • **Date Needed by** and **Time Needed by**. If the customer does not specify a date/time by which they need the service provided, ask. If the customer still does not provide a date/time, leave the fields blank. • **Date Customer Info Provided** and **Time Customer Info Provided.** Leave blank. The technician should complete these fields after obtaining all the necessary information from the customer in order to provide this service.
Problem	• **Hardware Type.** Choose the type of hardware for which there is a problem. If a hardware problem, that is not included in the list, choose "Other." If not a hardware problem, choose "Not applicable." • **Software Type.** Choose the type of software for which there is a problem. If a software problem, that is not included in the list, choose "Other." If not a software problem, choose "Not applicable." • **Critical Problem Related.** Choose "Yes" if there is a critical problem HEAT ticket related to this ticket. Otherwise, choose "No". • **Critical Problem Ticket Number.** If you selected "yes" in the previous field, enter the ticket's number. Otherwise enter "N/A." Please note that this field does not actually link this ticket with the referenced Critical Problem's ticket number.
Change	• **Change Type.** Choose the most applicable. • **Date Scheduled.** The planned date for implementing the change. Indian Health Service policy requires that all changes apparent to the customers, or that will cause an outage must be approved by the CCB. The affected customers must also be notified at least 3 days in advance. • **Time Scheduled.** The planned start time of the change. • **Est. Completion.** This field only needs to be completed when the change will take longer than one day to complete. • **Outage Required.** Choose "Yes" if the customer's service will be

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Call Type	Fields

	disrupted. If you are unsure, choose "TBD".
	• **Outage Duration.** If there will be an outage, enter the length of time for the outage in hours and/or partial hours. For instance 30 minutes would be entered as "00.50".
	• **Customer Notification Needed.**
	  • If change will not be noticeable by the customer and the does not require an outage, you may choose "No."
	  • If you are unsure, choose "TBD."
	  • Choose one of the following if the change will not be transparent to the customer (e.g. screen changes, or system outage), and attach a draft "Change Notification" request form (http://ihs.gov/OIT/cssd/customer/forms.htm) to this ticket for review by the CCB:
	  – "IHS-Wide" will go to everyone.
	  – "Targeted Customers" will cover situation when notices only need to go to specific units like OIT staff.
	  – "IHS-NetMgmt" (a distribution group whose membership includes IT support staff across the Institution.)
	  – Other when notices need to go to groups like HEAT Trackers, Indian Health Service Webmasters, etc.
	• **Approval Status.** The initial status is "Pending" approval from the CCB. This field can only be updated by select staff.

Critical Problem	• **Desc Customer Impact.** Enter a brief description that will explain to the technician(s) the impact the problem is having on the customers. • **Hardware Type.** Choose the type of hardware for which there is a problem. If a hardware problem, that is not included in the list, choose "Other." If not a hardware problem, choose "Not applicable." • **Software Type.** Choose the type of software for which there is a problem. If a software problem, that is not included in the list, choose "Other." If not a software problem, choose "Not applicable." • **Impact.** Choose the most applicable level of impact to the customers. This field is used for categorizing critical problems and their level of occurrence in reports.

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Call Type	Fields

- **Impacted Organization.** Choose the value which best describes the units affected by the problem.
  - **Multiple.** More than one organization is affected. If you know which organizations, list them in the description.
  - **See Organization.** If the affected organization is the same as the customer's organization for whom this ticket is being created.
  - **IHS-Wide.** Affecting everyone in the Indian Health Service.
  - **Unknown.** Aren't sure which organizations are being affected.
  - **Other.** If the affected organization is different than the customer's organization and none of the other options apply, list the affected organization in the description.
- **Number Impacted.** Enter the estimated number of users being impacted by the problem. You may also enter a short text description such as "All".

Figure 6-8: Table of call types and fields

11. Click the **Assignment** tab. The tab area will come up blank.
12. *Right* click the Assignment tab and choose *New Assignment*. Complete the assignment information.

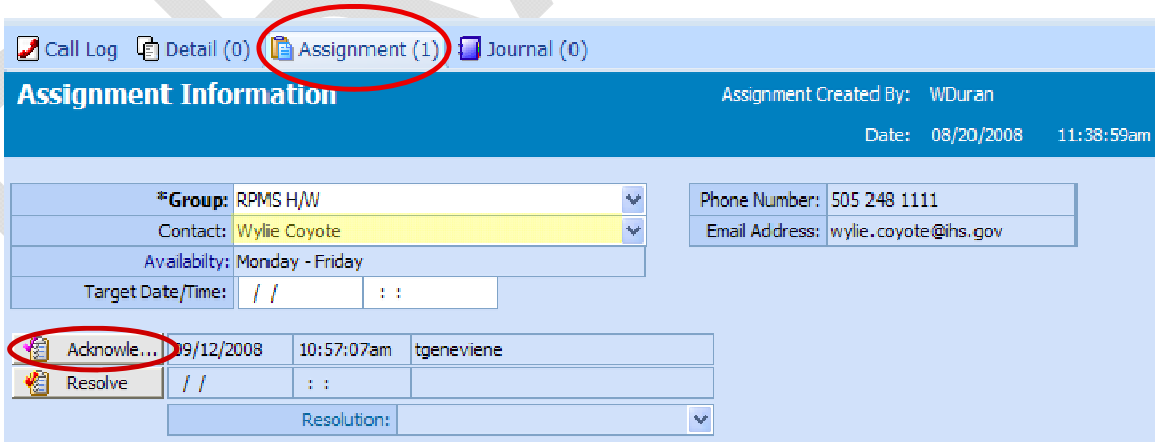

Figure 6-9: Sample of screen used to enter assignment information

- Choose the *Group* to which the HEAT technician belongs who will be working the ticket.
- Choose the HEAT technician from the *Contact* dropdown list-box. The technician's information defaults.

- In the *Comments* field, enter any information that will be helpful for the technician to complete the assignment that is not recorded in the "Description of Problem/Request" or does not warrant a journal entry.

13. If more than one technician will need to work this call, create another assignment for each technician by repeating Step # 11.

14. Save the Call Record by going to the menu bar and selecting **Save > Save Call Record**, or click the *Save Call Record* icon.

Figure 6-10: Sample of Save Call Record icon

A Call ID (HEAT ticket number) is assigned to the call and is displayed in the upper left hand corner of the Call Logging window.

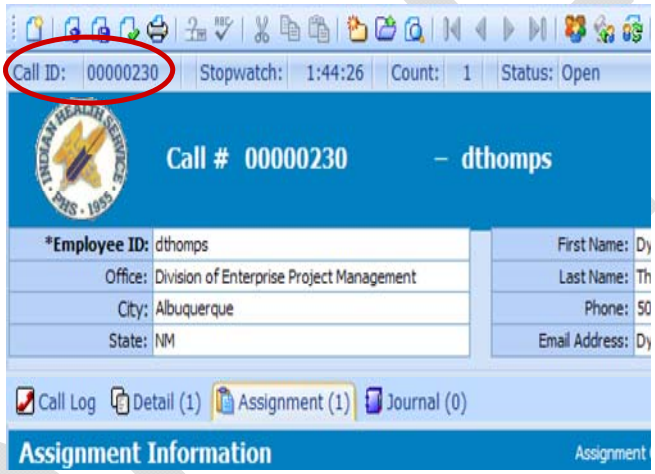

Figure 6-11: Sample of ticket showing assigned Call ID (ticket number)

15. The next action depends on what you need to do with the call. The following table contains more information.

Status	Value
You solved the customer's problem or request	• Give the customer the help desk ticket number. • Acknowledge the ticket: – On the **Assignment** tab, right mouse click on the **Acknowledged by** field. – Choose **Acknowledge**. • Close the ticket following the steps in Section 5.10 of this document.
You assigned the ticket to someone else for action	• Give the customer the help desk ticket number. • If this is a critical problem, contact the technician(s) via phone to them know about the problem and the related ticket number.

Figure 6-12: Table of status and values

7.2 Put an Unsaved Ticket on Hold

Tickets that have not yet been saved can be placed "on hold. When you place a ticket on hold, it allows you to create or open another ticket without first completing all the required information. The maximum number of calls you can simultaneously place on hold is 15.

7.2.1 Steps to Put an Unsaved Ticket on Hold

To place an unsaved ticket on hold, take the following steps:

1. Without saving the ticket, choose **File > Put Call on Hold** from the menu bar.

2. The menu bar shows the number of calls on hold in the *Count* field. See the following example.

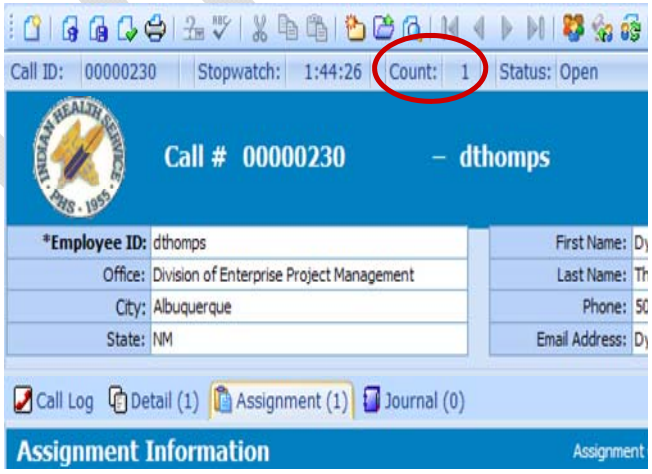

Figure 6-13: Sample of screen used to put a ticket on hold

When you place a call on hold, HEAT creates a special "Calls On Hold" Call Group. This group works like any other call group in Call Logging – except that *the group's calls are only viewable from your computer*.

3. After placing a call on hold, you may either view an existing ticket or create a new ticket.

7.3 Retrieve a Ticket on Hold

7.3.1 Steps to Retrieve a Ticket Placed on Hold

To retrieve a ticket placed on hold, take the following steps:

1. Choose **Window > Calls on Hold**.

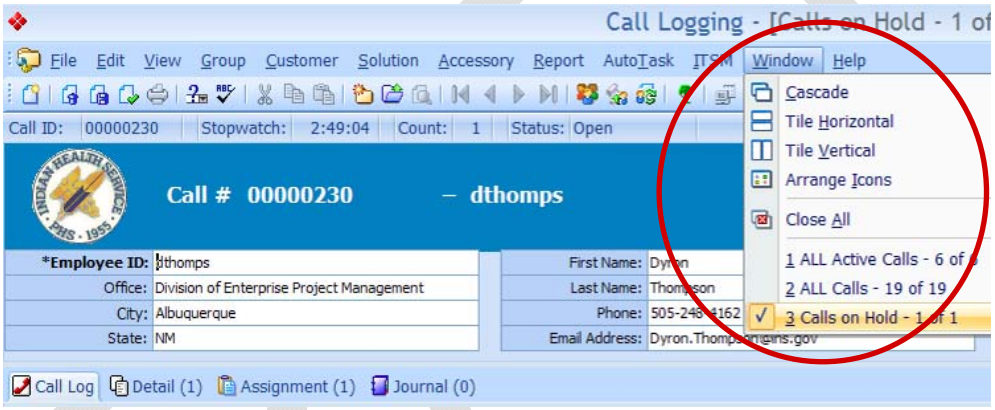

Figure 6-14: Sample of calls on hold window

2. If more than one ticket was put on hold, click the call record navigation buttons located on the toolbar to move between the calls in the Calls on Hold call group.

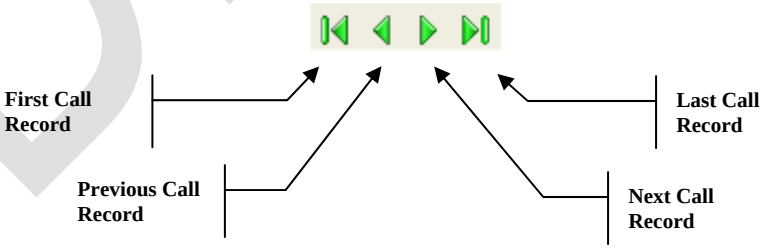

Figure 6-15: Sample of moving between calls

Note: Once you save a ticket that has been put on hold, it is removed from the "Calls On Hold" Call Group.

7.4 Open

HEAT tickets may be opened in several ways. See the *Open a Ticket* section of this document.

- By the specific HEAT ticket number
- From a call group (a grouping of tickets generally with the same technician or another common attribute)
- From the alert monitor.

7.4.1 Steps to Open a Specific Ticket

To open a specific ticket, take the following steps:

1. From the menu choose *File > Go To Call ID.*
2. Type the ticket number into Call ID field.

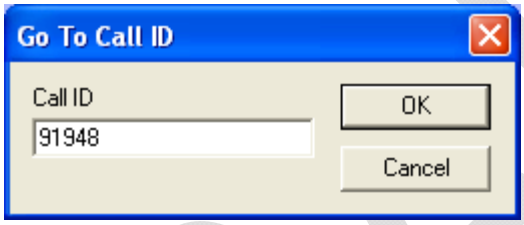

Figure 6-16: Sample of screen used to enter call ID

3. Click the **OK** button.

7.4.2 Steps to Open a Ticket from a Call Group

1. From the menu choose ***Group > Open Call Group***.
2. Choose the call group you want to open.

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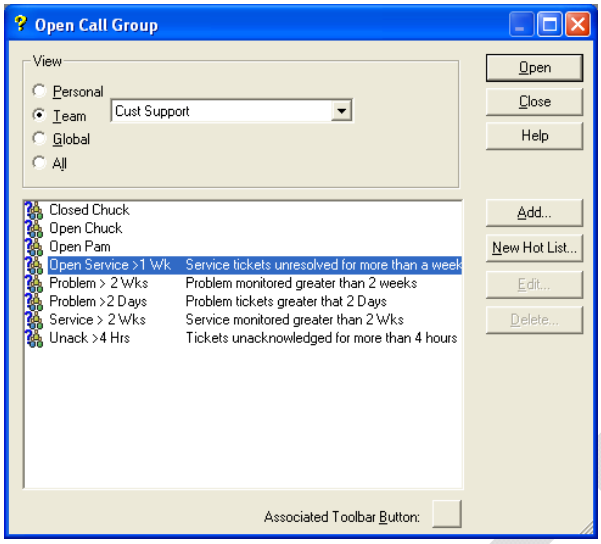

Figure 6-17: Sample of Open Call Group window

3. Click the **Open** button.

4. The oldest call record appears first. Click the call record navigation buttons located on the toolbar to move between the calls in the call group.

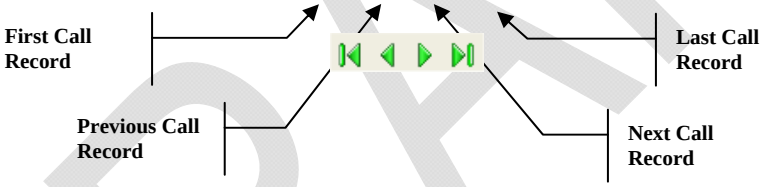

Figure 6-18: Illustration of call records

7.5 Acknowledge

The first step in working a HEAT ticket is acknowledging it. Acknowledging the ticket signifies that at a minimum you are aware of its existence.

> **Note:** Generally, tickets should be acknowledged within four (4) hours. You should use *Alert Monitor* to obtain notices of tickets needing your attention.

7.5.1 Steps to Acknowledge

To acknowledge a ticket, take the following steps:

1. Open the ticket.

2. Click the **Assignment** tab.

3. Click the **Acknowledge…** button in the lower portion of the Call Logging screen.

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4. A date/time stamp showing when you resolved the assignment is shown in the "Acknowledge" field along with your HEAT User ID.

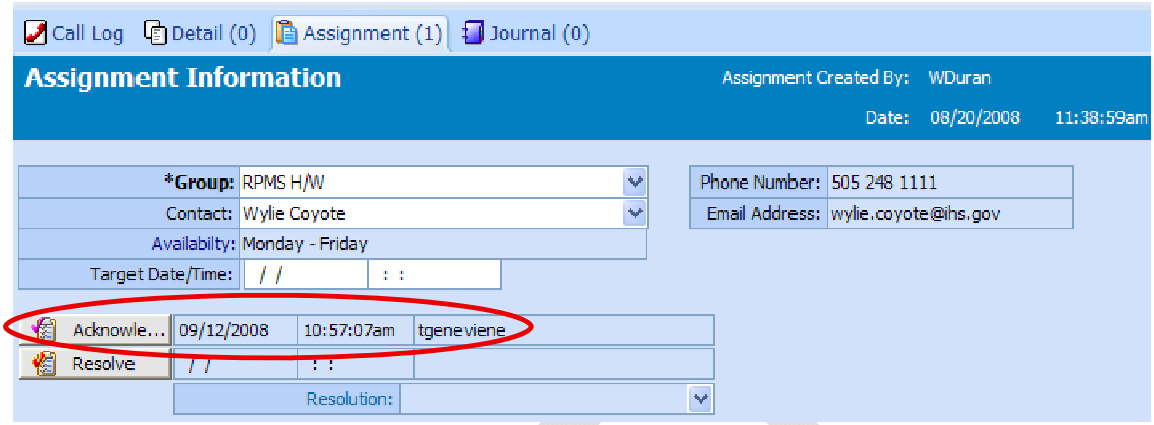

Figure 6-19: Sample of entering acknowledgement information

5. Click the **Save Call Record** icon on the menu bar.

Figure 6-20: Sample of Save Call Record icon

7.6 Resolve an Assignment

When you have completed your work on the HEAT ticket, you need to "resolve" your assignment. If you did not do any work on the HEAT ticket and need to assign it to someone else, follow the steps to "Reassign" the ticket (see the *Reassign* section of this document.)

> **Note:** Resolving an assignment does not close the ticket. After you resolve an assignment, the ticket may remain in your *Alert Monitor* if there are any other open assignments depending on how your Alert Monitor set up.

7.6.1 Steps to Resolve an Assignment

To resolve an assignment, take the following steps:

1. Open the ticket.
2. Before you resolve the assignment, you should add a journal entry to document your actions (see the *Add a Journal Entry* section of this document).
3. Click the **Assignment** tab.
4. Click the **Resolve…** button, located immediately below the Acknowledge button.

5. The *Enter Value* window opens. Click the dropdown arrow, and select either *Completed* or *Reassigned* as appropriate.

Figure 6-21: Sample of entering value to resolve ticket

6. A date/time stamp stating when you resolved the assignment is shown in the "Resolved" field along with your HEAT User ID.

7. In the *Resolution* field, choose "Completed."

> **Notes:** If the technician does not need to perform any work related to a ticket, including reassigning the ticket, choose "Canceled" in the resolution field.
>
> Conditions that can result in this include (1) customer fails to provided need info, so the technician closes the ticket, (2) customer cancels a request for service; (3) multiple assignments were made and this assignment was extraneous.

8. Click the **Save Call Record** icon on the menu bar.

9. At this point you need to decide if the ticket needs to go to someone else for a follow-on action, or if the ticket can be closed since all of its assignments are resolved.

10. To create a new assignment, follow the steps in the *Create a New Assignment* section of this document.

11. To close the ticket, follow the steps in the *Close* section of this document.

If there are other open assignments, no further action is required by you once you have resolved your assignment.

7.7 Create a New Assignment

Each HEAT ticket may be assigned to one or more HEAT technicians. Multiple assignments can be created at once, or additional assignments can be created at any time to an open ticket.

7.7.1 Steps to Create a New Assignment

To create a new assignment, take the following steps:

1. Open the ticket.

2. Click the **Assignment** tab to bring up that screen. Then *right click* it to bring up a dropdown menu. Select *New Assignment.*

3. Complete the Assignment Information fields.

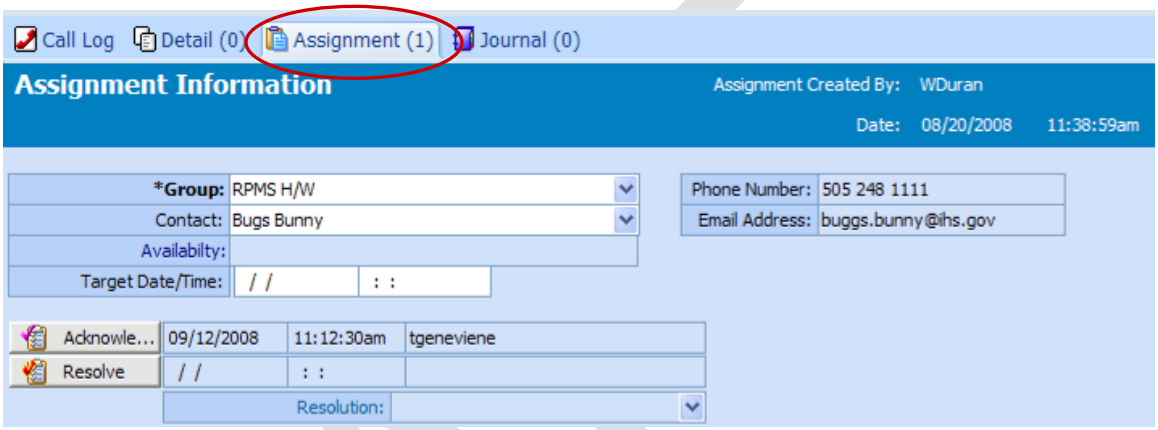

Figure 6-22: Sample of entering assignment information

4. Choose the Group to which the HEAT technician belongs who will be working the ticket.

5. Choose the HEAT technician from the *Technician* dropdown list-box. The technician's information defaults.

6. If more than one technician will need to work this call, create another assignment for each technician by repeating the above steps.

> **Note:** Important details about the assignment should always be included in a journal entry. Section 6.11 *Add a Journal Entry* provides instructions.

You may abandon changes to the current assignment by clicking the **Abandon Changes** icon, located on the menu bar. This will also abandon any changes you made to the ticket since it was last saved. Note the following example of the icon.

Figure 6-23: Sample of Abandon Changes icon

7. Click the **Save Call Record** icon to save your work.

Figure 6-24: Sample of Save Call Record icon

7.8 Reassign

Note: Never reassign a ticket by selecting a new name from the Technician field on the Assignment tab. The steps described below should always be followed to ensure that an audit trail is maintained on a ticket's assignments.

There are only two reasons when you would reassign a ticket to someone else:

- A ticket is assigned to you by mistake.
- The only action you are taking on the ticket is to assign it to someone else for action. For example:
    - Supervisors may choose to have the all tickets in their area assigned to them and then they'll assign them to their staff.
    - One technician may reassign a ticket to a coworker with the same job duties whose workload is currently lighter.

If the ticket was correctly assigned to you and you have finished your assignment, do not reassign it to someone else. Instead you should "resolve" your assignment (see *Resolve an Assignment* section of this document) and create a new assignment (see the *Create a New Assignment* section).

7.8.1 Steps to Reassign a Ticket to Someone Else

To create a new assignment, take the following steps:

1. Open the ticket.
2. Click the **Assignment** tab.
3. Click the **Resolved** button.

Figure 6-25: Sample of Resolve button

4. When the *Enter Value* window appears, use the dropdown arrow to select the appropriate resolution code. Select **Reassigned**.

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5. Click the **Validate** button. The *Validate from Resolved* window appears, showing the resolution and description. Click **OK**.

6. You will be returned to the *Enter Value* window. Click **OK**.

7. If you are reassigning the ticket to another group because it was assigned to you error (versus to another member of your group), create a journal entry explaining the reason for the reassignment.

8. Click the **Save Call Record** icon located on the menu bar.

9. Create a new assignment following the steps in the *Create a New Assignment* section of this document.

> **Note:** If a ticket was assigned to you in error and you do not know to whom it should be assigned, reassign the ticket to the OIT Help Desk Manager. Please include in the Comments that "This ticket was assigned to me by mistake and I don't know to whom it belongs. Please reassign."

7.9 *Place Holder:* Change a Ticket's Status to Monitoring

..

7.10 Update

After a ticket is saved you may update any of its information on the call log and detail tabs. In fact, you should regularly update the "*Status/Solution*" field to keep the customer informed of the ticket's progress. More details are provided in this section.

7.10.1 Steps to Update a Ticket's Status and Information

To update a ticket's status and information, take the following steps:

1. Open the ticket.

2. Update the ticket's information.

   The following table provides additional information.

3. Click the **Save Call Record** icon located on the menu bar.

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Update the…	Guidance
Call Log tab	• You may update or correct any information on this tab. • If you are correcting information, add a journal entry briefly describing the correction. • It may be appropriate to update the *Call Status* before closing a ticket. – Choose "Deferred" if further action on the ticket must wait until another action is completed, or the ticket is pending a decision. – Choose "Monitoring" when you want to check the effectiveness of a ticket's resolution before closing the ticket, and enter the *Resolution Information Date* and *Time* as of when the technician believes the ticket was resolved. • **Resolution Information:** Enter the date and time when the technician believes to have resolved the problem. This may be different than the date and time when the ticket is closed – especially if the ticket was being monitored. • The *Status/Solution* is the primary field that the customer refers to in Help Self Service to check a ticket's status. – Update it regularly to show progress on the ticket. – Use it to explain ticket dependencies such as waiting for completed request form from the customer. – When you update it, place your initials in parenthesis (e.g., (abc)) at the end of the comment so that other technicians and trackers will know who entered the update. – When updating the Status/Solution, it is always a good idea to cut-and-paste the contents of the Status/Solution into the Journal – especially for time critical or sensitive information. – This extra step may help prevent problems later on if the status/solution is accidentally erased or modified.
Detail tab	• You may update or correct any information on this tab. • For service tickets, the technician should update the *Date Customer Info Provided* and *Time Customer Info Provided* fields. • If additional information was required before the service could be provided, enter the date and time when that information was obtained.

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Update the…	Guidance
	• Otherwise if all the needed information was provided when the ticket was opened, enter the ticket's original date and time. • *Do not* enter the close date and time. • If you are correcting information, add a journal entry briefly describing the correction.
Assignment tab	• *Never change the **technician***. If an assignment was made in error, follow the steps to reassign the ticket as described in the *Reassign* section of this document.
Journal tab	• Add detailed information about the ticket and progress.

7.11 Add a Journal Entry

Journal entries are used to record information such as additional customer provided details, status updates, resolutions, or notes for the next technician.

Once a journal entry is saved, it cannot be changed. Therefore journal entries are a very good place to put information as a matter of record.

7.11.1 Steps to Add a Journal Entry

To add a journal entry, take the following steps:

1. Open the ticket from the Call Logging window.
2. Click the **Journal** tab.
3. Go to the *Journal Type* box. Click the dropdown arrow to select from a list of recognized journal entry types.
4. Type a comment describing the action you took, and complete the journal entry as shown in the following example. You may also edit existing journal entry text.

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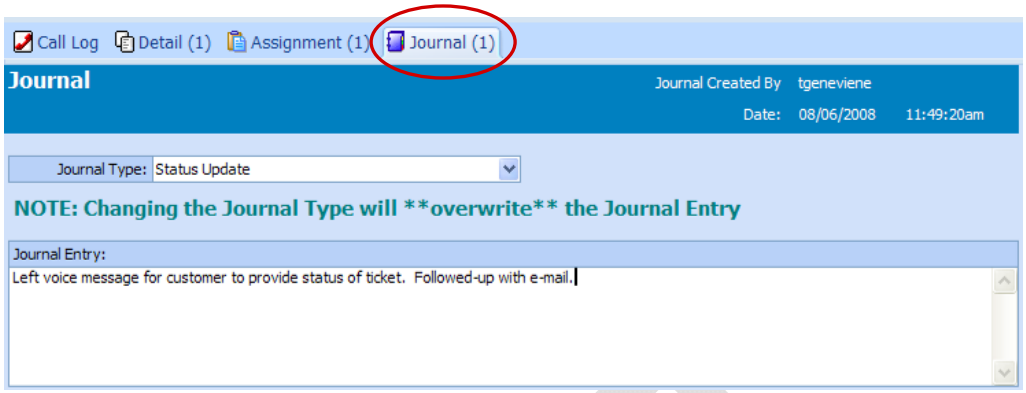

Figure 6-26: Sample of creating a journal entry

5. To run spell check on your journal entry, right mouse click in the *Journal Entry* area and choose **Spell Check** from the menu that appears. The spell check works similarly to other spell checks by identifying words not in its dictionary. You may choose a replacement word, ignore the word, or type a new word.

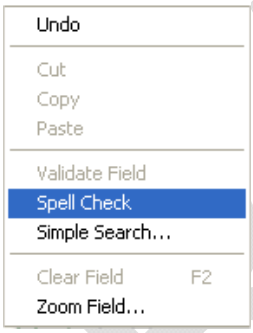

Figure 6-27: Sample of selecting Spell Check

If necessary, you may abandon changes to the current journal entry by clicking the Abandon Record icon, located in the menu bar at the top of the screen.

Figure 6-28: Sample of Abandon Record icon

Note: This will also abandon any changes you made to the ticket since it was last saved.

6. Click the **Save Call Record** icon, or go to **File > Save Call Record**.

7.12 Close

Once all of a ticket's assignments are resolved, the ticket needs to be closed by the last technician.

> **Note:** *Do not close the ticket until you are finished adding all the information* to it (e.g. journal entries). Once a ticket is closed, its information cannot be changed without reopening the ticket.

7.12.1 Steps to Close a Ticket

To close a ticket, take the following steps:

1. Open the ticket.

2. Go to the *Call Log* tab. Make note all of the current Solution Description entries which show the progress of the ticket as it was being worked, and copy them into a journal entry.

- Highlight the **Solution Description** text.
- Press the **Ctrl** key with the **c** key to copy the text.
- Click the **Journal** tab.
- Copy this final Solution Description text into a journal entry.
- Enter the final solution or resolution into the Solution Description field.
    - Click within the *Journal Entry box* and press the **Ctrl** key with the **v** key to add the solution text.
    - For problems, include the detail about the cause of the problem (if known) and the steps used to solve it.

Copying the solution description text to the journal ensures that the information you entered will not be lost during future ticket updates – such as reopening a ticket.

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Closing Service Tickets

For service tickets, click the **Detail** tab to display the Critical Problem Detail Screen, and update the information there.

If additional information was required from the customer before the service could be provided, use the Customer Impact Description box to include the date and time when that information was obtained.

Otherwise if all the needed information was provided when the ticket was opened, use the ticket's original date and time.

Do not enter the close date and time in these fields.

3. Click the **Call Log** tab.

4. Go to the lower right of the Solution Description area. In the UVF (User Verified the Fix) field, click the dropdown arrow and select the option that best indicates whether the customer verified to you that the fix or resolution met their expectations (N/A, Yes, or No).

Note: Every effort should be made to contact the customer to verify that the ticket was completed satisfactorily. Whenever possible, contact the customer in person or via phone. Otherwise, contact the customer through e-mail.

Document each contact attempt as a journal entry in the ticket. If after three tries, conducted on separate days, the customer has failed to respond, close the ticket and list UVF as "no".

5. In the *Incident Cause* field, choose the most appropriate reason for the initial ticket.

- "Failure" when the problem was due to hardware failing or a bug found in the software.
- "Request" when the ticket is a service request initiated by the customer.
- "Scheduled work" when the ticket is a service request for regularly scheduled maintenance activities.
- "User Error" when the user made a mistake or did not know how to use the hardware or software. Usually training should be provided to the customer to prevent the problem from reoccurring.

- "Virus" when the problem was due to a confirmed virus infection.
- "Other" for any other cause.

6. In the Reason for Closure field, choose from the following:
   - "Completed" when the problem or service request was completed.
   - "Invalid Ticket" when the ticket was created in error.
   - "Canceled by Technician" should only be selected when the assignment cannot be accomplished due to technical or budget constraints. The technician must contact the customer to explain why the ticket was closed, and whenever possible help identify alternatives the customer can explore to satisfy their needs.
   - "*Redirected Customer to …*" is selected when the responsible staff for fulfilling the problem or service request is not a technician in the OIT maintained HEAT database.
   - Otherwise, choose the most appropriate reason for the ticket not being completed as described in the "description of problem/request."
7. In the *Resolution Information* area, enter the date and time details of when the technician believes the ticket was actually resolved, for example the date and time prior to being put in monitoring status. Otherwise, enter the current date and time.
8. Go to the *Milestones* area in the lower right of the screen. At *Closed By* enter the date and time.
9. The ticket *Status* will automatically change to *Closed* when the ticket is closed.

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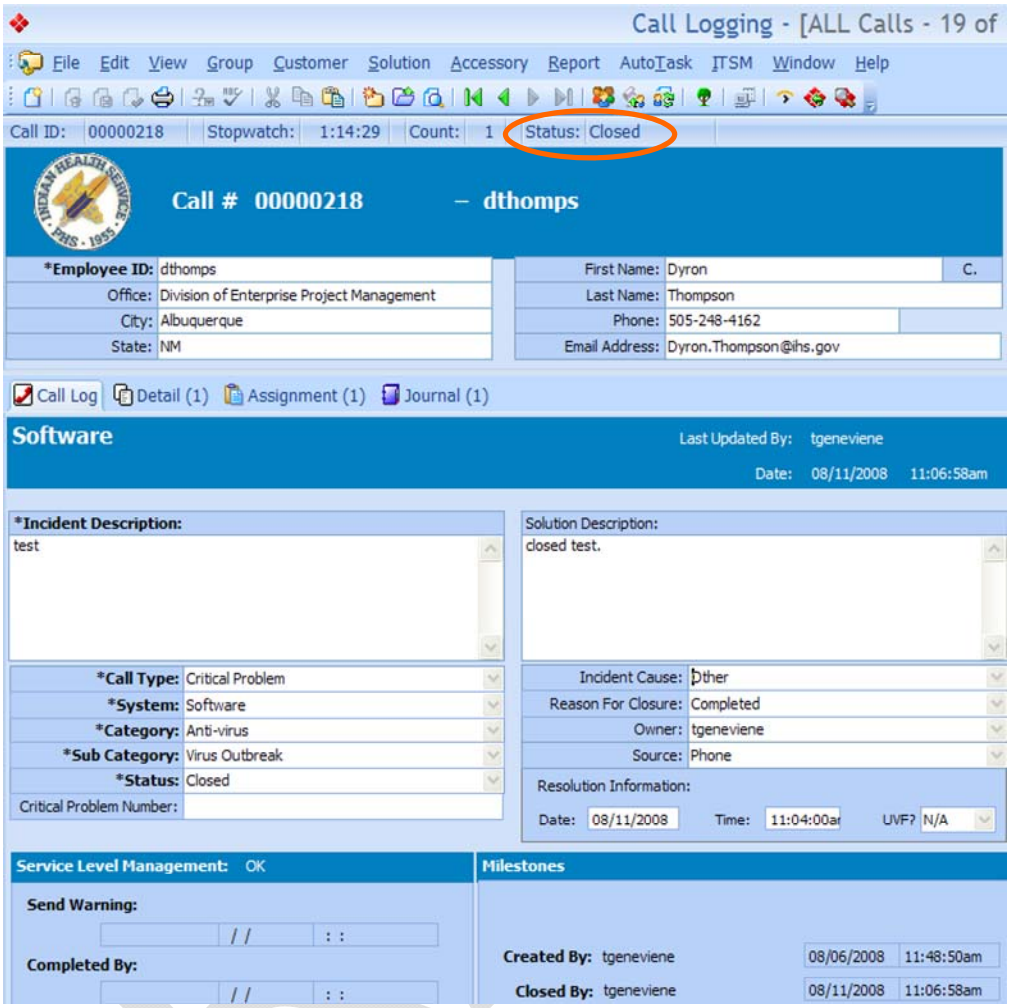

Figure 6-29: Sample of closed ticket

10. HEAT checks the ticket's contents to see if all the assignments have been resolved and all the mandatory fields completed. If not, a message box will remind you of either required fields or actions that must be completed before you can close the ticket. Once all the requirements are met, you will be able to successfully close the ticket.

11. Confirm that the Call Status is "Closed."

12. Remember to save your work. Click the **Save Call Record** icon.

7.13 Reopen a Ticket

A closed ticket can be reopened when it was closed erroneously, additional information needs to be added to the ticket, or the customer does not feel it was resolved.

In addition after a customer has verified a fix, problem and critical problem tickets should *only be re-opened if the problem reoccurs on the same day as when the ticket was initially marked resolved.* Otherwise, create a new ticket and reference the old ticket number.

> **Notes:** The steps described below must be followed when reopening a ticket to move the ticket's status information to a journal entry in the ticket. Otherwise the contents of the status will be lost.

7.13.1 Steps to Reopen a Ticket

To reopen a ticket, take the following steps:

1. Open the closed ticket.
2. Choose **File > Reopen Call Record**.
3. Click the **Yes** button to move the status to a journal entry. Otherwise, the old status information could be lost.

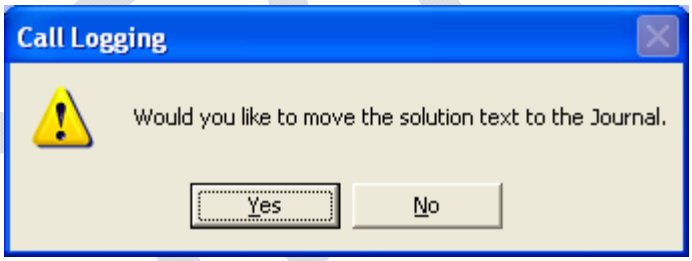

Figure 6-30: Sample of moving status to a journal entry

4. A journal entry is created showing the date and time that the ticket was originally closed, the technician that originally closed the ticket, the reason for the closure, and the solution description.
5. At the top of the screen, the status of the call is now "Reopened."
6. Create a journal entry explaining the reason for reopening the ticket.
7. If you do not plan to immediately close the reopened ticket, create a new assignment for the ticket.

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8. Click the **Save Call Record** icon.

9. If you are finished updating the ticket and no further action is required, close the ticket as described in the *Close* section of this document.

7.14 View Activity for a Ticket

HEAT tracks all the activity (or history) of each ticket in an Activity Log. This log shows details such as when the call status changed or the call type change. In addition, it identifies the user who made the change along with the date and time.

7.14.1 Steps to View Activity Log

To look at a ticket's history, take the following steps:

1. Open the ticket.

2. Go to **View > Activity Log** from the menu bar, or click the Activity Log icon at the bottom right of the screen.

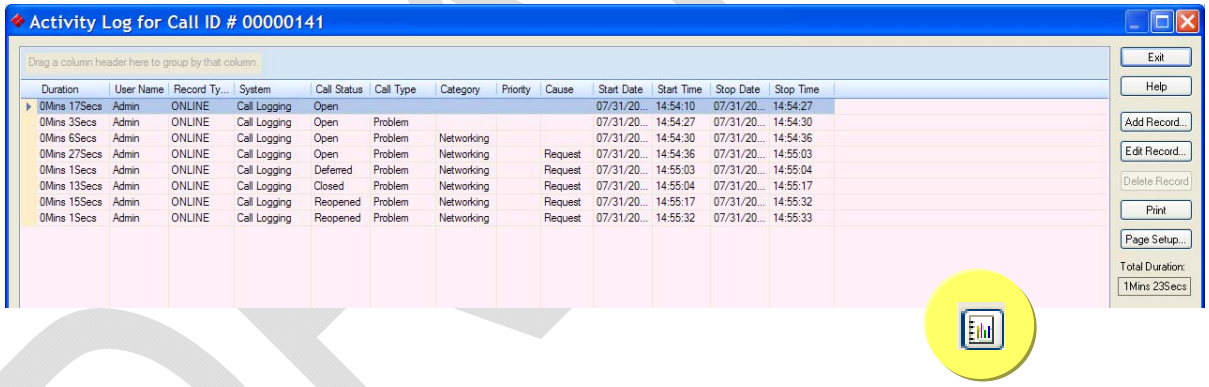

Figure 6-31: Samples of activity log for a particular call ID, and activity log icon.

3. For more information on the column headings, click the **Help** button.

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8.0 Customer Information: Step-by-Step Instructions

HEAT stores information about each customer as a customer profile. This information is accessed each time you create a ticket for a customer. At the Indian Health Service, generally only HEAT Administrators may create new customer profiles. However all HEAT trackers may view this information, make updates, and review the call history of a customer.

> **Note:** Do not create a ticket just to look up a customer's information, and later abandon it. *Abandoned tickets are also assigned ticket numbers.* Instead follow the steps defined in this section.

8.1 View a Customer Profile

8.1.1 Steps to View a Customer Profile

To look at a customer profile, take the following steps:

1. From the Call Logging menu, choose **Customer > Search**.
2. The *Profile Search* window appears. For the *Customer Type* choose **Employee**.
3. Enter your search criteria following one of the examples below.
4. Click the **Search** button.

Examples
The examples show using the "like" operator. "Like" searches for matches that begin the same as the value you entered. If you have a high level of confidence in your search criteria, you may use the "**=**" equal operator to find only exact matches.

HEAT ID Search
To search based on the HEAT ID, enter the search criteria where:

- Field = Profile.CustID
- Operator = like
- Value = <enter the customer's HEAT ID>

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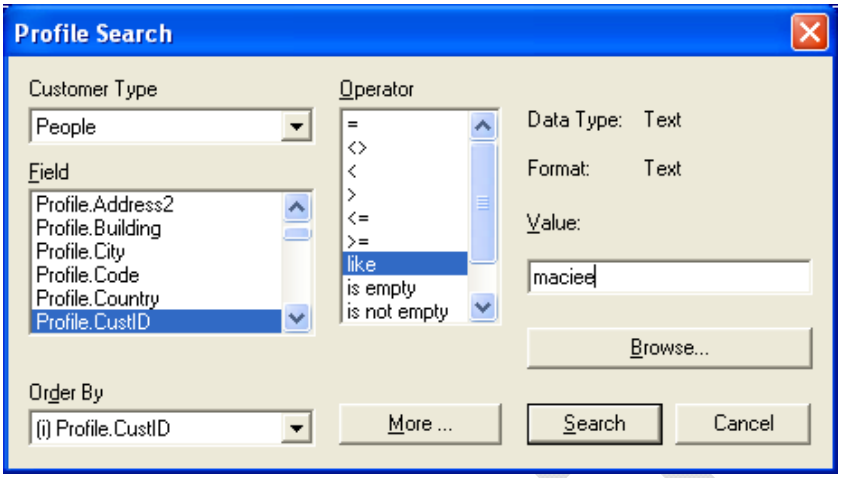


Figure 7-1: Sample of entering search criteria

Last Name Search

To search based on the last name, enter the search criteria where:

- Field = Profile.LastName
- Operator = like
- Value = <enter the customer's last name or the first few letters of the last name>

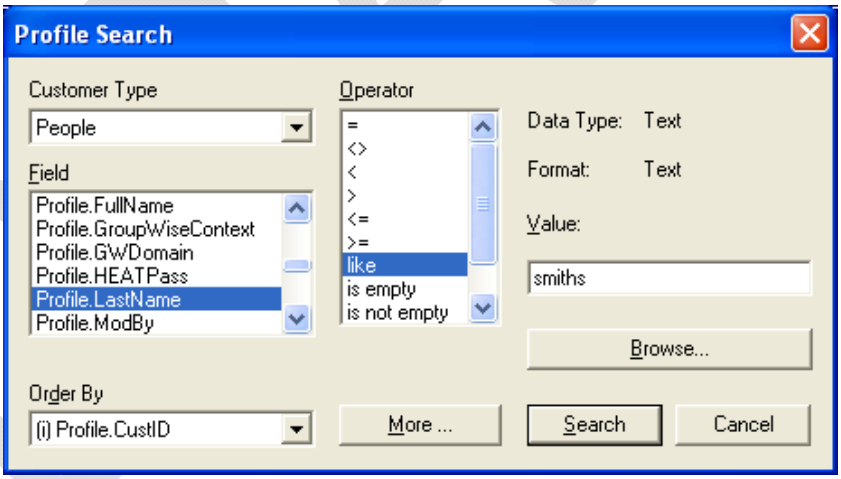


Figure 7-2: Sample of entering search criteria

Unit Search
To search based on a unit, enter the search criteria where:

- Field = Profile.Organization
- Operator = like
- Value = <Click the Browse… button to select one of the available units>

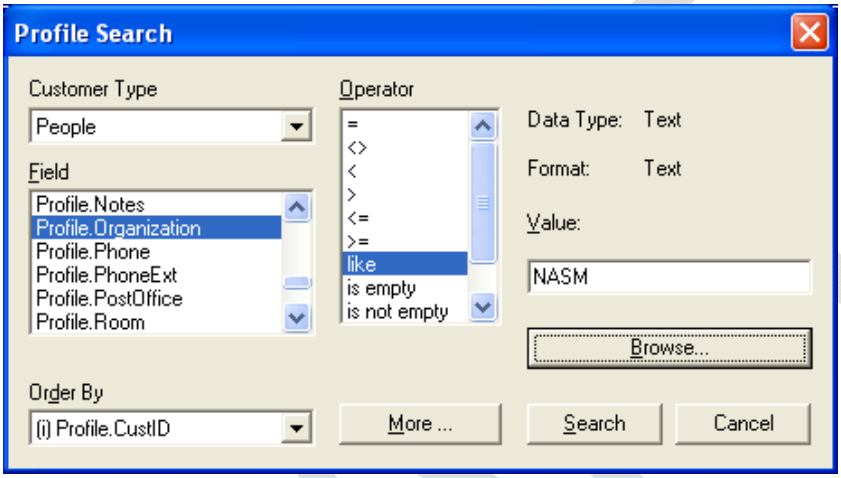


Figure 7-3: Sample of entering search criteria

8.2 Display a Customer's Ticket History

In HEAT, you can easily view all of a customer's past and current tickets. This is especially helpful for verifying that the current problem or service request wasn't previously reported. It also allows you to see if this is a recurring problem and review the past actions taken to resolve the problem.

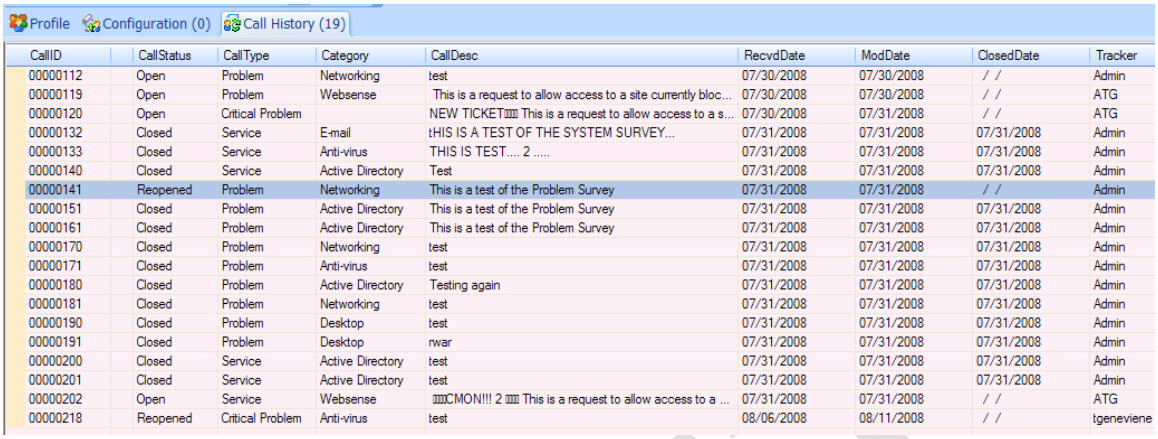
8.2.1 Steps to View a Customer's Ticket History

To look at a customer's ticket history, take the following steps:

1. If you are currently viewing a new or existing ticket for the customer, click the **Customer Profile** icon. Otherwise go to the menu bar and select **View > Profile**.

Figure 7-4: Sample of Customer Profile icon

2. Click the **Call History** tab.



CallID	CallStatus	CallType	Category	CallDesc	RecvdDate	ModDate	ClosedDate	Tracker
00000112	Open	Problem	Networking	test	07/30/2008	07/30/2008	/ /	Admin
00000119	Open	Problem	Websense	This is a request to allow access to a site currently bloc...	07/30/2008	07/30/2008	/ /	ATG
00000120	Open	Critical Problem		NEW TICKET This is a request to allow access to a s...	07/30/2008	07/31/2008	/ /	ATG
00000132	Closed	Service	E-mail	tHIS IS A TEST OF THE SYSTEM SURVEY...	07/31/2008	07/31/2008	07/31/2008	Admin
00000133	Closed	Service	Anti-virus	THIS IS TEST.... 2	07/31/2008	07/31/2008	07/31/2008	Admin
00000140	Closed	Service	Active Directory	Test	07/31/2008	07/31/2008	07/31/2008	Admin
00000141	Reopened	Problem	Networking	This is a test of the Problem Survey	07/31/2008	07/31/2008	/ /	Admin
00000151	Closed	Problem	Active Directory	This is a test of the Problem Survey	07/31/2008	07/31/2008	07/31/2008	Admin
00000161	Closed	Problem	Active Directory	This is a test of the Problem Survey	07/31/2008	07/31/2008	07/31/2008	Admin
00000170	Closed	Problem	Networking	test	07/31/2008	07/31/2008	07/31/2008	Admin
00000171	Closed	Problem	Anti-virus	test	07/31/2008	07/31/2008	07/31/2008	Admin
00000180	Closed	Problem	Active Directory	Testing again	07/31/2008	07/31/2008	07/31/2008	Admin
00000181	Closed	Problem	Networking	test	07/31/2008	07/31/2008	07/31/2008	Admin
00000190	Closed	Problem	Desktop	test	07/31/2008	07/31/2008	07/31/2008	Admin
00000191	Closed	Problem	Desktop	rwar	07/31/2008	07/31/2008	07/31/2008	Admin
00000200	Closed	Service	Active Directory	test	07/31/2008	07/31/2008	07/31/2008	Admin
00000201	Closed	Service	Active Directory	test	07/31/2008	07/31/2008	07/31/2008	Admin
00000202	Open	Service	Websense	CMON!!! 2 This is a request to allow access to a ...	07/31/2008	07/31/2008	/ /	ATG
00000218	Reopened	Critical Problem	Anti-virus	test	08/06/2008	08/11/2008	/ /	tgeneviene

Figure 7-5: Sample of screen used to view call history

3. To *sort* the tickets, click the column heading by which you want the results sorted. For example, you could click the *RecvdDate* column to view the most recently opened tickets.

4. To *view* a ticket, double click the ticket number.

8.3 Update a Customer Profile

In HEAT, you can update an existing HEAT Profile. However the addition of new customers can only be done by the HEAT System Administrators. If you come across a customer who is not listed in HEAT, please contact the OIT Help Desk.

Please note that customer's may also update their profile information themselves from within Help Self Service (HSS).

8.3.1 Steps to Update a Customer Profile

To update a customer profile, take the following steps:

1. If you are currently viewing a new or existing ticket for the customer, click the **Customer Profile** icon, or go to the menu bar and select **View > Profile**.

2. Go to the Profile tab. Here you may update all the information, except the HEAT ID.

3. Click the **Save Customer Record** icon to save the updates.

9.0 Searches and Reports: Step-by-Step Instructions

The Difference between Searches and Reports
Searches allow you to locate one or more tickets that match the criteria you define. The results of searches are displayed online and normally allow you to view a ticket online.

Reports are similar to searches in that they also allow you find tickets that match specific criteria. However, reports are printed and not viewed online. In addition, reports support more complex search criteria. Standard and custom reports are available in HEAT.

9.1 How to Request a New Report

If you require a custom report, submit a request to the OIT Help Desk outlining your requirements. If there is a similar standard or custom report, please reference it in your request noting any required modifications required to meet your needs.

9.2 Simple Search

A Simple Search can quickly find a ticket by searching for all tickets with a common feature, such as *Software* or the name of a technician.

Normally simple searches are done when a tracker or technician is viewing an existing ticket and wants to see more like it. "More like it" would be any tickets that match *one* (1) condition, such as the same *System,* technician, or hardware type. Most of the fields have this search feature.

9.2.1 Steps to Conduct a Simple Search

To conduct a simple search, take the following steps:

1. With a ticket open, right click the field on which you want to base your search.

   - If you start your search from a blank ticket or an existing one that was not opened as part of a call group, the entire HEAT database will be searched.

2. A menu appears. Choose **Simple Search...**

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3. The simple search window opens automatically displaying the same *Value* that was in the ticket from which you began the search. You will see that in the following example *Office* is the field on which the sort was based.

- If you start your search from a ticket that is part of a call group or search results (a temporary call group), only the tickets in the call group will be searched when *Narrow an open call group* is checked.

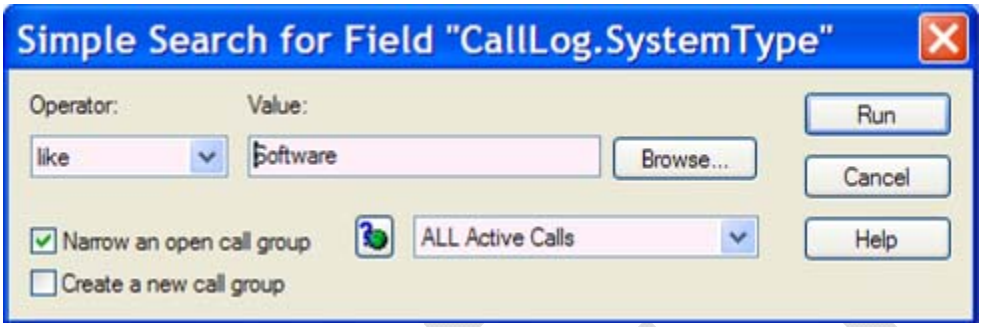

Figure 8-1: Sample of simple search options

4. If you want to search for another value in this field, delete the contents in the Value field and click the **Browse…** button to select another value.

5. Click the **Run** button. The total number of matches found is displayed in the *Count* field of the window title bar.

6. HEAT displays the last ticket it found that matched your search criteria. Note the information displayed in the following example of the Call Logging screen.

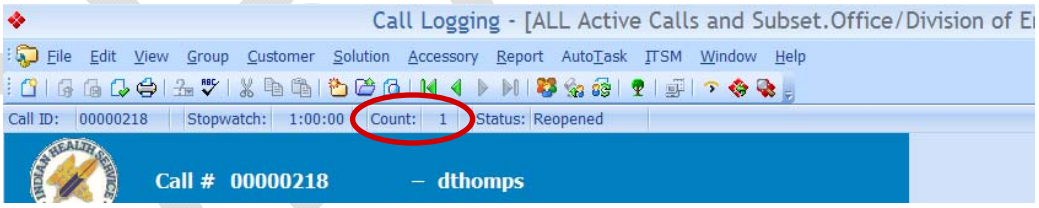

Figure 8-2: Sample of ticket found with search

You can navigate through all the matches using the call record navigation buttons located on the toolbar to view the other matches.

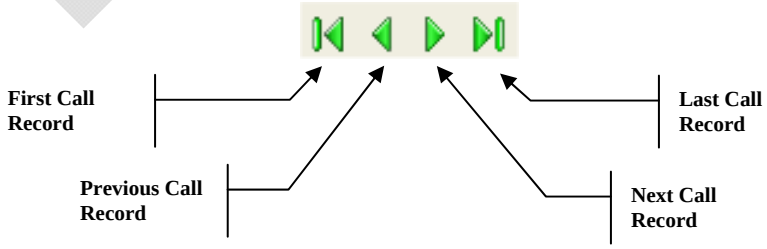

Figure 8-3: Illustration of using call record navigation

If you would like to view a summary of each of the tickets found, from the menu bar go to **Group > Call Record Browse**.

The *Call Record Browse* window opens, summarizing all the tickets found during the search. Double-click on any call ID to go to the ticket.

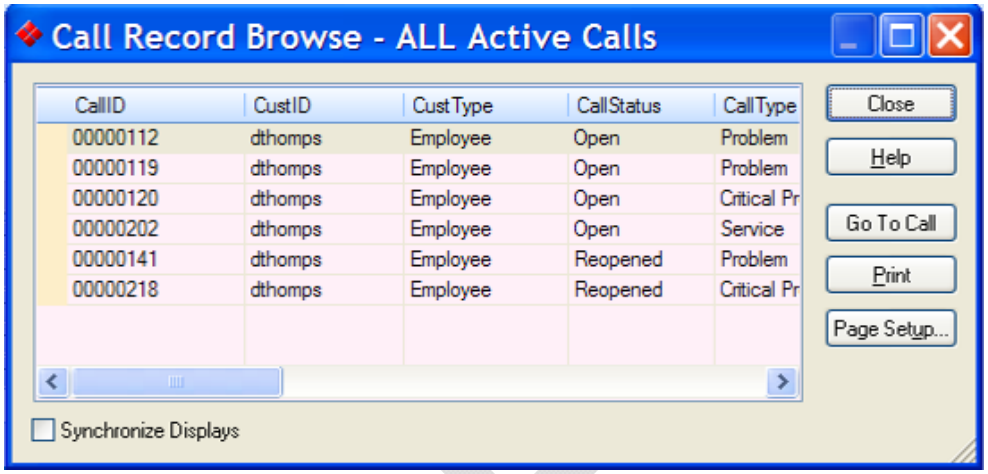

Figure 8-4: Sample of window showing summary of tickets found in search

8. To start a new search of the entire HEAT database, repeat the simple search, but *uncheck* the Narrow an open call group option.

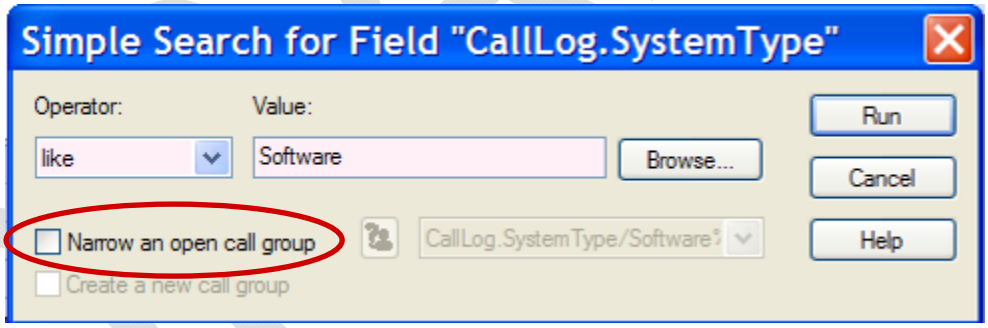

Figure 8-5: Sample of simple search of entire database

With HEAT 8.4 you also have the option of creating a new call group each time you refine a simple search. This allows you to keep your previous search results in the current call group. To use this option, check both *Create a new call group* and *Narrow an open call group* in the Simple Search window.

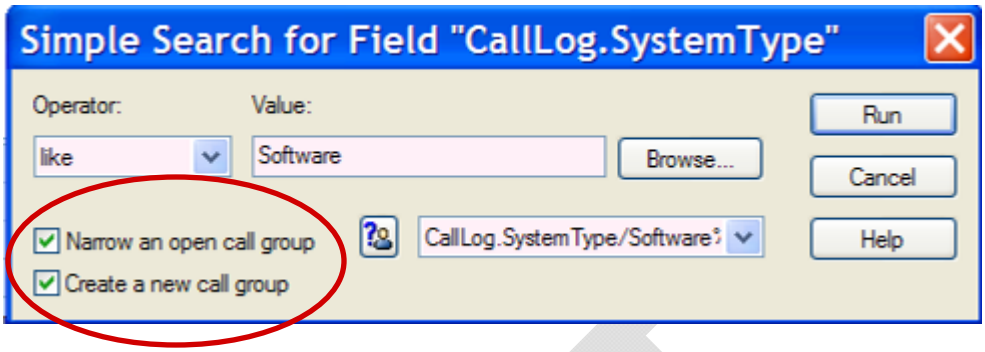

Figure 8-6: Sample of creating a call group for the search and narrowing a call group

9.3 Run a Canned Report

Canned reports are created by the HEAT System Administrator using Crystal Reports. You are welcome to run any of these reports for your own use.

If you will need a report that is not listed, please contact the OIT Help Desk to request a new report. If an existing report is similar to what you need, please include its name and what changes need to be made. This should help speed up your request.

Note: HEAT trackers will no longer have to login as "**heatatch**" or map to a specified drive (sometimes referred to as the T: drive) to access attachments or reports.

If you run reports from the call logging screen, you may want to manually map to that file store:
<file address/location here>.

This is only necessary if you run reports by choosing "Run Crystal Reports" from the Report menu choice in Call Logging. If you choose "Manage Reports" from that menu, this is not necessary.

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9.3.1 Steps to Run a Canned Report

To run a canned report, take the following steps:

1. From the Call Logging menu, choose **Report > Run Crystal Report …**

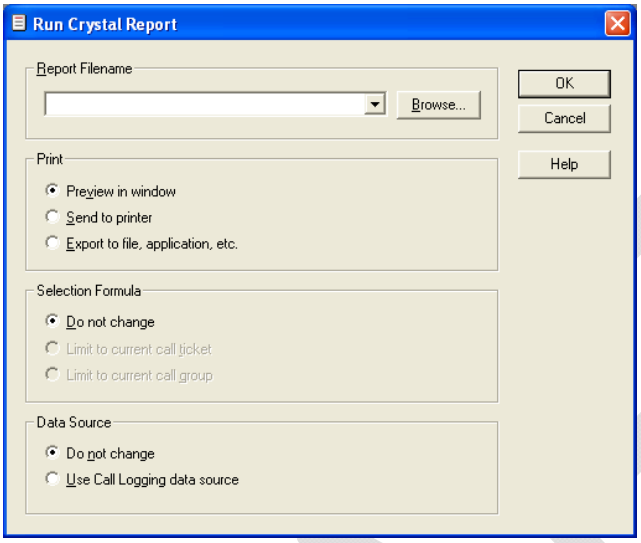

Figure 8-7: Sample of screen used in running reports

2. Click the **Browse…** button.

3. Navigate to the <file address/location here> folder, mapped as the U: drive in the following example.

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4. Browse for the report you want to run. Choose the report and click the **Open** button.

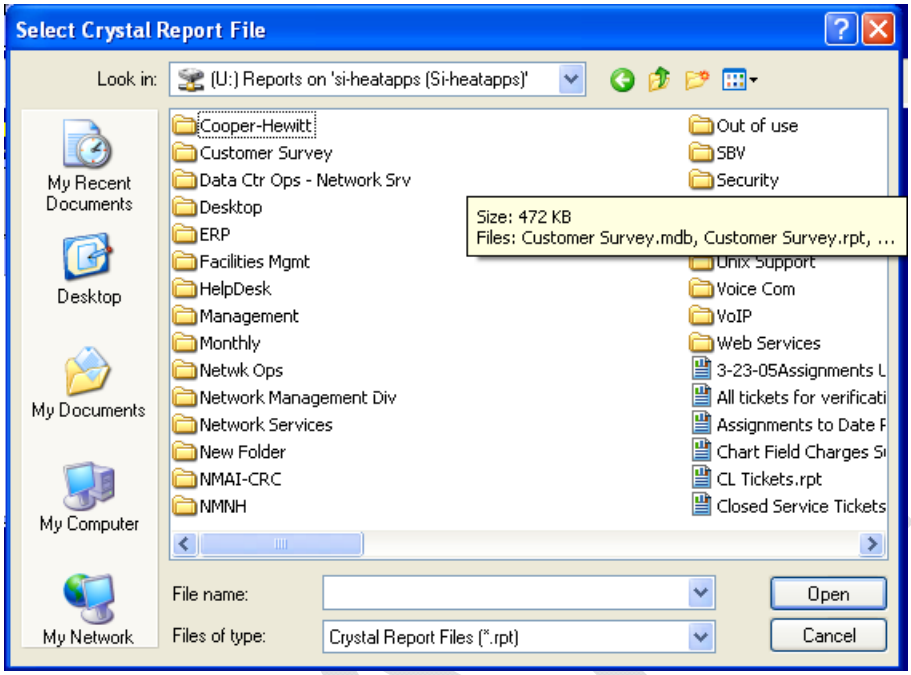

Figure 8-8: Sample of screen used in running reports

5. Choose where to *Print* the report:

- Preview in window. View the report online with the option to print it.
- Send to printer. Print the report to a printer of your choice.
- Export to file, application, etc. Save the report as a file in the format of your choice (e.g., Excel, Word, PDF) and to the directory of your choice.

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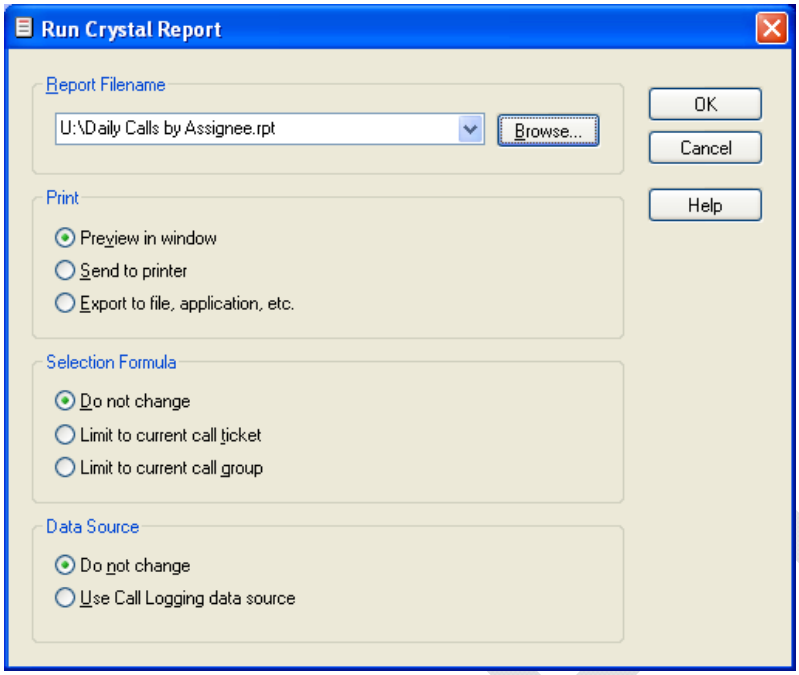

Figure 8-9: Sample of screen showing various print options

6. Click the **OK** button.

7. Type the Password "oitheat".

Figure 8-10: Sample of password screen

8. Click the **OK** button.

9. If exporting the file, choose the type of file Format (e.g., PDF, Excel, Word, HTML). Accept the default *Destination* of "Disk file." Then click the **OK** button. You will be prompted to select any formatting options and then a destination folder and file name.

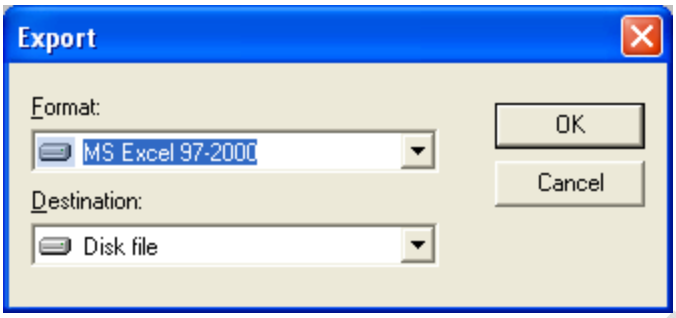

Figure 8-11: Sample of export window

10. If prompted for any report parameters, enter the values for each parameter in the Discrete Value field. If a ticket number is requested, be sure to include all leading zeros as shown in the example below. Then click the **OK** button.

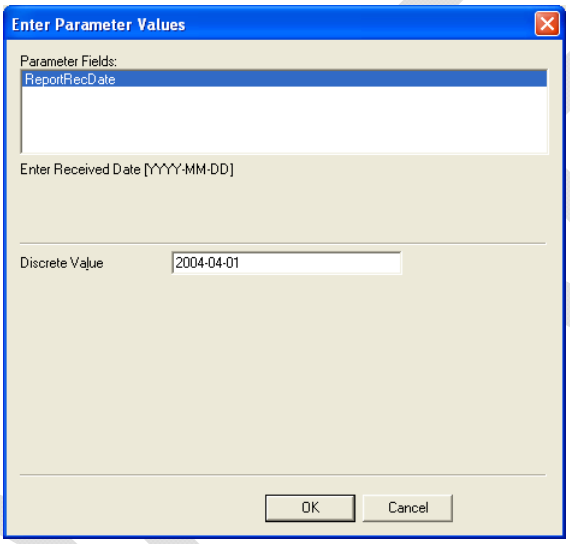

Figure 8-12: Sample of entering parameter values

11. If printing the report, confirm the information in the dialog box. Make any necessary adjustments and click the **OK** button.

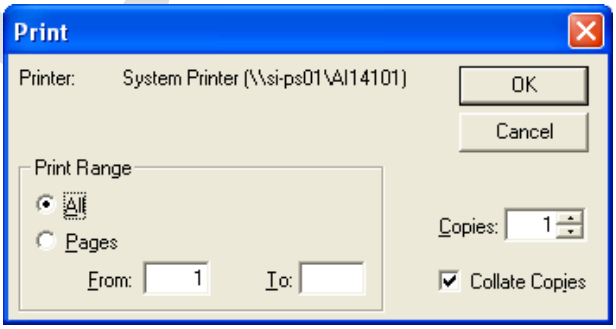

Figure 8-13: Sample of print window

Note: By default your system printer is selected. If you want to print the report to different printer, click the Cancel button and change your default Windows printer.

To change your default Windows printer:

1. From the Windows Start menu, choose **Settings > Printers and Faxes**.

2. Right mouse click on the printer to which you want to print your HEAT reports, and choose **Set as Default Printer**.

Another option is to repeat the steps to run a canned report but "export the file" in PDF format to the file location of your choice. You can then open the PDF and print it from within Acrobat.

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10.0 Attachments: Step-by-Step Instructions

You may attach one or more files or URLs to a ticket. In order for all technicians to view the attachments, the files must be located in a directory accessible by all HEAT technicians. The OIT Help Desk created the \\heat1\attachments directory for this purpose. After you map to this directory, you will need to log into it each time you log into the network.

Because the attachments are part of the HEAT ticket, it is important that they are not removed from this directory either by accidentally deleting, replacing, or renaming an attachment. Safeguards have been put in place to prevent this type of accident. However, technicians should also follow these basic rules:

- **Unique Name:** Make each attachment's name unique by naming it with the ticket's number as well as a short description.
- **Journal Entry:** Each time you add or modify an attachment create a journal entry in the ticket describing your actions for auditing purposes.

10.1 Attach a File

Notes: Before you can attach files to a HEAT ticket, it is very important that you map a network drive:

\\IHS-HEATAPPS\attachments.

You only have to do this once.

The instructions on how to "Map to the HEAT Network Drive" are described in the *Map to the HEAT Network Drives* section of this document.

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10.1.1 Steps to Attach a File to a Ticket

To attach a file to a ticket, take the following steps:

> **Note:** Beginning with HEAT Version 8, do not manually copy a file to the HEAT attachments directory. Instead, HEAT will automatically do this for you.

1. Open the call record to which you are adding the attachment.
2. Click the **Display Attachment Bar Menu** icon in the lower left corner of the Call Logging window.

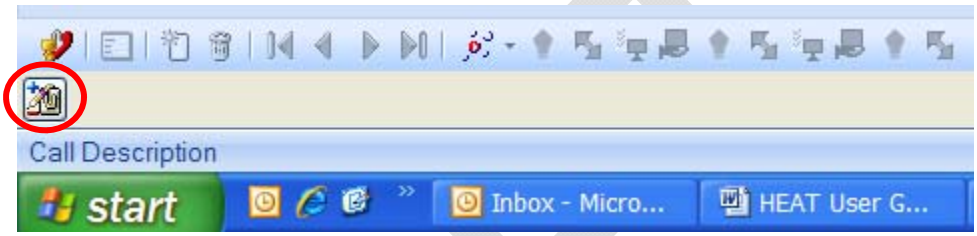

Figure 9-1: Sample of attachment bar icon

3. From the pop-up menu, choose **Add Attachment**.

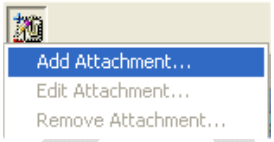

Figure 9-2: Sample of selecting Add Attachment

4. In the *Enter New Attachment Information for Call ID #xxxxxx* window take the following actions:

- Type a brief Description of the attachment (maximum of 26 characters).
- Check the **Copy Attachment** box. This is required to save a copy of the file on the *HEAT Attachment directory* allowing other people to open the attachment.

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- Click the **Browse** button to locate the complete File Name (URLs may also be entered).

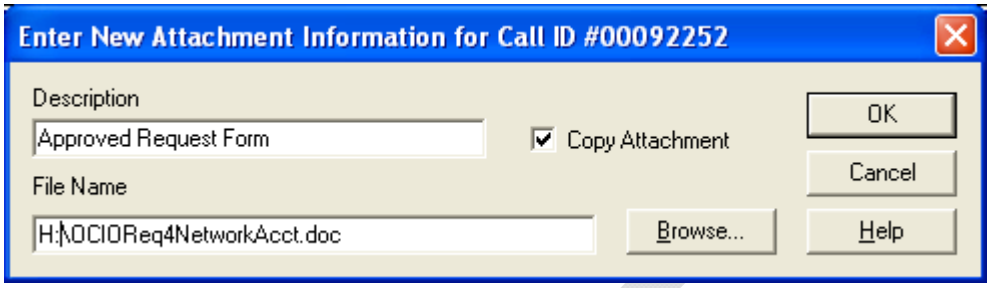

Figure 9-3: Sample of entering new attachment information

5. Click the **OK** button. The attachment appears on the *Attachment Bar*.

Figure 9-4 Sample of window showing attachment

6. Add a journal entry to the call record documenting the name and source of the attachment that was just added. This creates an audit trail in case something accidentally happens to the attachment.

10.2 View an Attachment

10.2.1 Steps to View a Ticket's Attachments

In order to look at the attachments for a ticket, take the following steps.

1. Open the ticket call record that contains the attachment.

2. Click the attachment's button located on the *Attachment Bar*, as shown in the previous example. It may take a few seconds for the attachment to open.

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10.3 Attachment Not Found

If you receive an error message that an attachment is not found, contact the OIT Help Desk to have them reattach the attachment. You will need to provide the following:

- Ticket number
- Name of the attachment that is missing.

10.4 Edit an Attachment

Due to access controls implemented with HEAT 8, you cannot edit an attachment's description or location.

- To change the file that is attached, create another attachment (see the *Attach a File* section of this document) with a unique file name and attach it to the ticket. Please remember to add a journal entry briefly summarizing the reason why the updated attached file was added.
- To change an attachment's description, contact the OIT Help Desk to have the description updated. You will need to provide the ticket number and both the old and new description for the attachment.

10.5 Remove an Attachment

10.5.1 Steps to Remove an Attachment

In order to remove an attachment from a ticket, take the following steps.

1. Contact IHS OIT User Support and ask for the attachment to be removed.
2. Add a journal entry describing why the attachment was removed.

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10.6 Map to the HEAT Network Drives

HEAT trackers will no longer have to login as "**heatatch**" or map to a specified drive (sometimes referred to as the T: drive) to access attachments. We have configured the HEAT application to automatically use the correct file location for attachments. If you need to search this folder manually, you can map to the following UNC: \\ihs-heatapps.ihs.gov\Attachments.

If you run reports from the call logging screen, you may want to manually map to that file store: \\ihs-heatapps.ihs.gov\Reports. This is only necessary if you run reports by choosing "Run Crystal Reports" from the Report menu choice in Call Logging. If you choose "Manage Reports" from that menu, this is not necessary.

To map a drive, go to My Computer or start Windows Explorer. Choose "**Map Network Drive**" from the *Tools* menu in either.

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11.0 AutoTasks: Step-by-Step Instructions

AutoTasks are created by the Indian Health Service HEAT System Administrator for your use. AutoTasks automate routine or repetitive actions. This makes HEAT easier and faster to use by HEAT Trackers and technicians. You can also place an AutoTask button on your toolbar to make it even easier.

This chapter includes directions on how to use AutoTasks. If these examples give you ideas for additional AutoTasks, create a service ticket to submit your request to the HEAT system administrators.

11.1 AutoTask: Change Ticket Status to Monitoring

11.1.1 *Place Holder:* Steps for AutoTask to Change Ticket Status to Monitoring

11.1.2 *Place Holder:* AutoTask: Open HEAT User Guide

11.1.3 *Place Holder*: AutoTask: E-mail a Customer Prompt

11.2 Add an AutoTask to Your Toolbar

You can add any of the AutoTasks to your toolbar in HEAT.

11.2.1 Steps to Add an AutoTask to Toolbar

To add an AutoTask to your toolbar take the following steps:

1. From the menu, choose **AutoTask > Manage AutoTasks**, and the Manage AutoTasks window appears.
2. In the View section, select **All**.
3. Click once to select the AutoTask you want to add to your toolbar.
4. Click the **Associated Toolbar Button** in the lower right area of the window, as shown in the following example.

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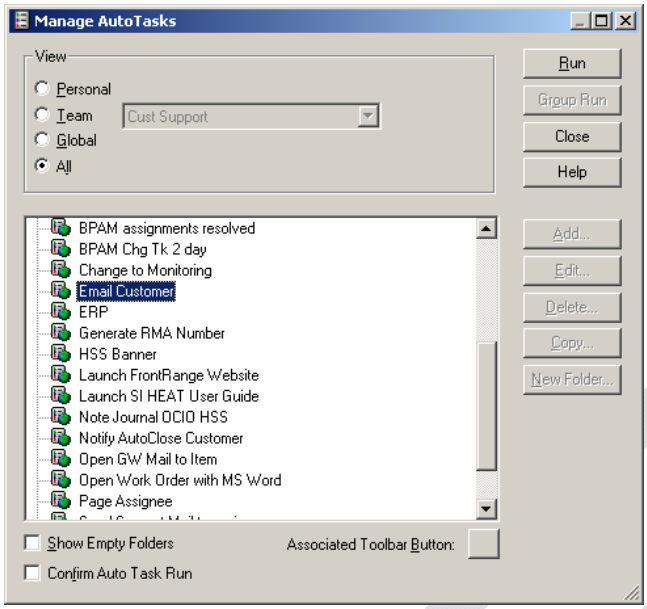

Figure 10-7: Sample of Manage AutoTasks window

5. Choose the icon of your choice. See the following example.

6. Click the **OK** button.

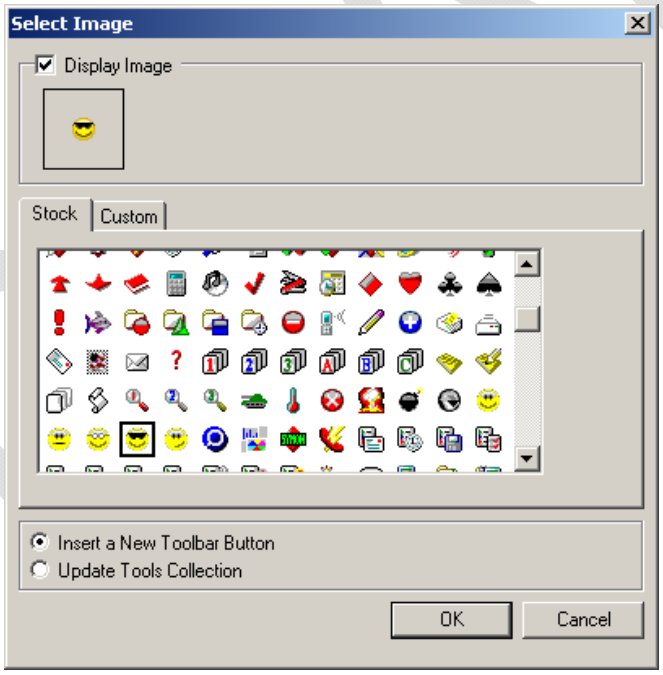

Figure 10-8: Sample of selecting an icon

7. You will be returned to the *Manage AutoTasks* window. Click the **Close** button, and the icon appears on the right side of your toolbar.

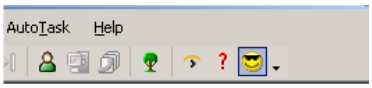

Figure 10-9: Sample of toolbar with newly chosen icon

11.2.2 Steps to Remove an AutoTask Button from Toolbar

To remove an AutoTask button from the toolbar take these steps:

1. Right mouse click the button you want to remove and choose **Customize**.
2. With the customize window opens, *drag* the toolbar button off the toolbar.
3. Click the **Close** button.

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12.0 Tips and Tricks

12.1 Shortcut Keys: Call Logging

With the cursor located in a field, you may press the shortcut keys to take the desired action.

Action	Shortcut Key
Clear a date or time field	F2
Fill in System Date or Time (while in a date or a time field)	F3
Display Calendar (while in a date field)	F4
Display all the allowable values for a field	F9
Go to the Call ID	Ctrl+G
New Assignment	Ctrl+A
New Call	Ctrl+N
New Journal	Ctrl+J
Put a Call on Hold	Ctrl+H
Quick Close	F10
Save	Ctrl+S
Spell Check (the current field)	Shift + F9

Figure 11-1: Table of actions and shortcut keys

12.2 Navigation Keys: Call Logging

Press the shortcut keys to quickly move between tickets, or a ticket's tab.

Action	Shortcut Key
Previous Call	F7
Next Call	F8
First Call	Shift+F7
Last Call	Shift+F8
Call Log	Alt+1
Detail	Alt+2
Assignment	Alt+3
Journal	Alt+4

Figure 11-2: Table of actions and shortcut keys

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12.3 Shortcut Keys: Alert Monitor

While in *Alert Monitor*, you may press the shortcut keys to take the desired action.

Action	Shortcut Key
Define a Call Group Alert	CTRL+G
Define a System Message Alert	CTRL+M
New Alert Definition	CTRL+N
Open a Call Group Alert Definition	CTRL+O
Poll Now	F5
Save	CTRL+S
Start/Stop Polling (toggles back and forth)	F2
View Alert Summary	F8
View Journal Entries	CTRL+J

Figure 11-3: Table of actions and shortcut keys

12.4 Spell Check

In *Call Logging*, you may spell check any text entry field. Unfortunately, Call Logging only allows you to spell check one field at a time. At a minimum, we recommend that you spell check the "*Description of the Problem/Request*", "*Status/Solution*", and all journal entries.

12.4.1 Steps to Spell Check a Field

To spell check the contents of a field take the following steps:

1. Place the cursor in the text field you want to spell check.
2. Click the **Spell Check** icon.

Please note that only some of the fields have the spell check option. If a field does not have the spell check option, the Spell Check icon on the toolbar will be grayed out.

Figure 11-4: Sample of spell check icon

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Spell Check feedback and options for correction will be provided, as shown in the following example.

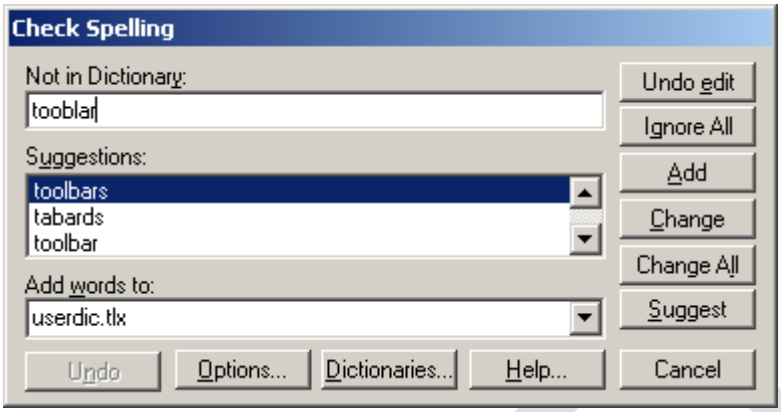

Figure 11-5: Sample of Check Spelling window

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13.0 Troubleshooting

13.1 Cannot Update a Ticket

A ticket cannot be updated when its status is "Closed." If you need to make an update to a closed ticket, please follow the steps in the *Reopen a Ticket* section of this document. This section describes how to reopen a ticket.

However if the ticket's status is anything other than "Closed" (e.g., open, monitoring, or reopened), and you cannot update the ticket or select any dropdown menus, then the ticket has most likely been locked by the HEAT server. Contact the OIT Help Desk to request that the ticket be unlocked by the HEAT System Administrator.

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14.0 Glossary of Terms and Definitions

Term	Definition
Abandon	To cancel the creation of a ticket or changes to a ticket (e.g., journal entries or assignments) that have not yet been saved.
AD	Active Directory
AIS	An assemblage of hardware, software, firmware, or any combination of these, configured to accomplish specific information-handling operations, such as communication, computation, dissemination, processing, and storage of information. This includes computers, networks, or other electronic information handling systems, and the associated equipment.
Alert Monitor	The software application in HEAT that notifies technicians of tickets requiring their attention. Tickets may also be opened from within Alert Monitor.
Assignee	Technician. A person responsible for an action on a help desk ticket.
Call Group	A collection of tickets that generally have something in common. For instance, all open tickets, or all the tickets assigned to the same person.
Call ID	A unique reference number assigned by HEAT to a help desk ticket.
Call Logging	The core software application of the HEAT system used to log, track, and resolve help desk tickets (calls). It also provides a database for queries and reporting.
Call Record	The term that HEAT uses to refer to a help desk ticket. *See Ticket.*
Customer Record	An important component of Call Logging that contains information about customers including their call history.
HEAT Board	A centrally located bulletin board in HEAT's Call Logging used to post general messages of interest to other technicians (for instance the status of a system outage) and to link related tickets to one another.

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Term	Definition
Help Self Service (HSS)	A web-enabled HEAT interface that allows *customers* to enter their own service request or problem tickets. Customers access it directly through PRISM: www.ihs.gov/helpdesk/
iHEAT	A web-enabled HEAT interface that allows *technicians* to check and work their HEAT tickets from any computer with access to PRISM.
Journal Entry	A permanent memo field used to record important information about a ticket – including its status/solution.
Orphan Ticket	An orphan ticket is an open ticket that does not have any active assignments. Either all the assignments were resolved and the ticket was never closed; or, the ticket was never assigned to anyone.
Technician	A person responsible for an action on a help desk ticket.
Ticket	Contains the complete history and status of a customer service request, problem, critical problem, or change request. Tickets are used to assign, track, record, and report on an individual ticket's progress.
UVF	User verified the fix.

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15.0 Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT User Support (IHS) by:

Phone: (505) 248-4371 or (888) 830-7280

Fax: (505) 248-4297

Web: http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm

E-mail: support@ihs.gov

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