



Indian Health Service Office of Information Technology

HEAT User Guide v8.4

January 2009

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Document Information

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.

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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
1.0	01-Oct-08	Dyron Thompson	Revision to installation instructions
2.0	12-Dec-08	Thelma Vigil-Gomez Sandra Henderson	Modification for RPMS software

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Record of Changesvi

- 1. **Introduction**..... Error! Bookmark not defined.
 - 1.1 Purpose **Error! Bookmark not defined.**
 - 1.2 Scope and Applicability..... **Error! Bookmark not defined.**
 - 1.3 Roles and Responsibilities..... **Error! Bookmark not defined.**
 - 1.4 Topic..... **Error! Bookmark not defined.**
- 2. **Procedures**..... Error! Bookmark not defined.
- 3. **Appendix A: Title** Error! Bookmark not defined.

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01			

1. 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.

2. 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.

2.2 HEAT Ticket Lifecycle

While the assignments and actions for each ticket vary, each HEAT ticket has a common lifecycle as shown in Figure 2-1.

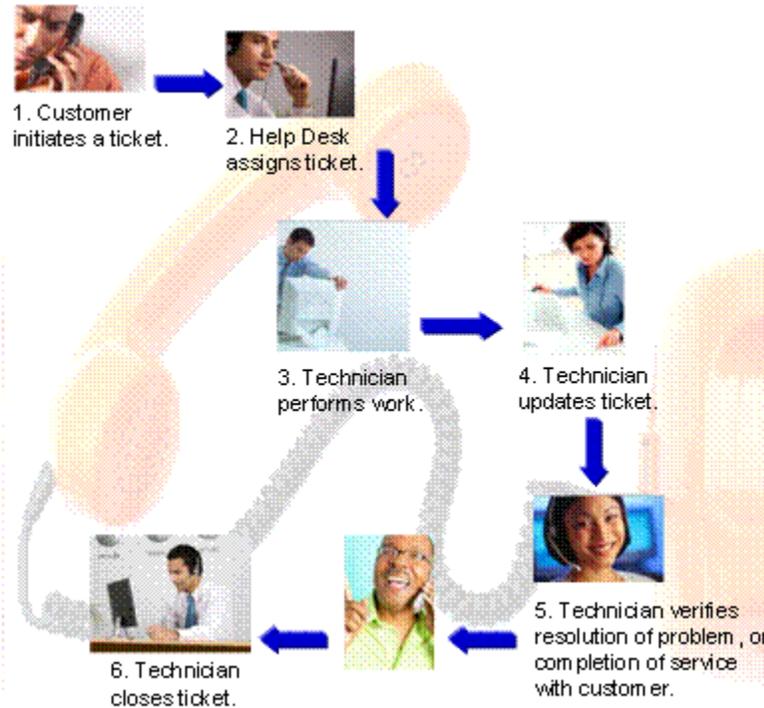


Figure 2-1: HEAT ticket lifecycle

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 made directly to the OIT Help Desk.
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.

Refer to the Standard Operating Procedures Help Desk Ticket Escalation Procedures <http://www.ih.gov/GeneralWeb/HelpCenter/Helpdesk/documents/Ticket%20Escalation%20SOP%2010-10.pdf> 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.

Table 2-1: Field Names and Definitions

Field Name	Definition
Call Type	The general nature of the problem. Options include <i>Change</i> , <i>Problem</i> , <i>Critical Problem</i> , and <i>Service</i> .
System	What is impacted? There are two simple options: Hardware or Software.

Field Name	Definition
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	<p>The current status of the ticket in HEAT.</p> <ul style="list-style-type: none"> • 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	<p>The source that best describes how the customer requested a service or change, or reported a problem.</p> <ul style="list-style-type: none"> • 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). • 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 <i>Call Logging</i>. • 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	<ul style="list-style-type: none"> • The IT support staff that services specific Indian Health Service units. Assign the ticket owner based on the customer's unit not their location. • If in doubt, choose OIT and the OIT Help Desk will reassign the ticket as appropriate.

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
- E-mail a request to the Help Desk at <http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm>
- 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.

3. Alert Monitor Set Up

Alert Monitor is a separate HEAT software application from *Call Logging*. It serves as a notification and monitoring tool for both technicians and managers. *In order to be able to work in the Alert Monitor, you must set up a call group.*

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.

3.1 Logging In

The following procedure provides instructions for logging into the HEAT Alert Monitor.

To login to alert monitor:

1. Double click Alert Monitor shown in Figure 3-2 on your desktop.



Figure 3-1: Sample of Alert Monitor button

If your HEAT account does not match your Active Directory (AD) account ID, or if do not have an AD account:

- Enter your HEAT User ID and password or
- Contact the OIT Help Desk to have your HEAT ID modified to match your AD account ID



Figure 3-2: HEAT Alert Monitor login screen

2. Select an Option from the list to open an existing alert or create a new one.



Figure 3-3: HEAT Alert Monitor login screen

3. Click OK to continue.

See Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk (IHS).

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

Fax: (505) 248-4363

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

Email: support@ihs.gov

Appendix A: Call Groups for information about creating an alert definition or Call Group.

3.2 Viewing an Existing Ticket

To open a ticket from the Alert Monitor, double click the call record for the ticket you wish to open.

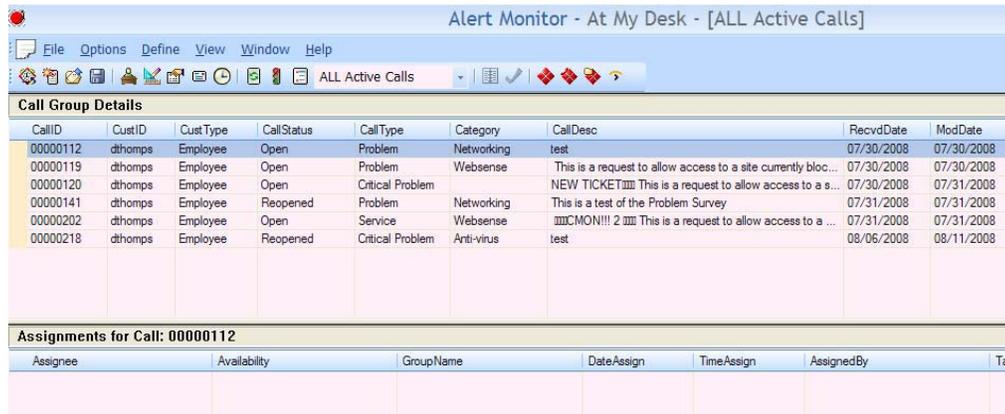


Figure 3-4: Alert Monitor with List of Active Calls

The ticket opens in the HEAT Call Logging window as shown in Figure 3-34.

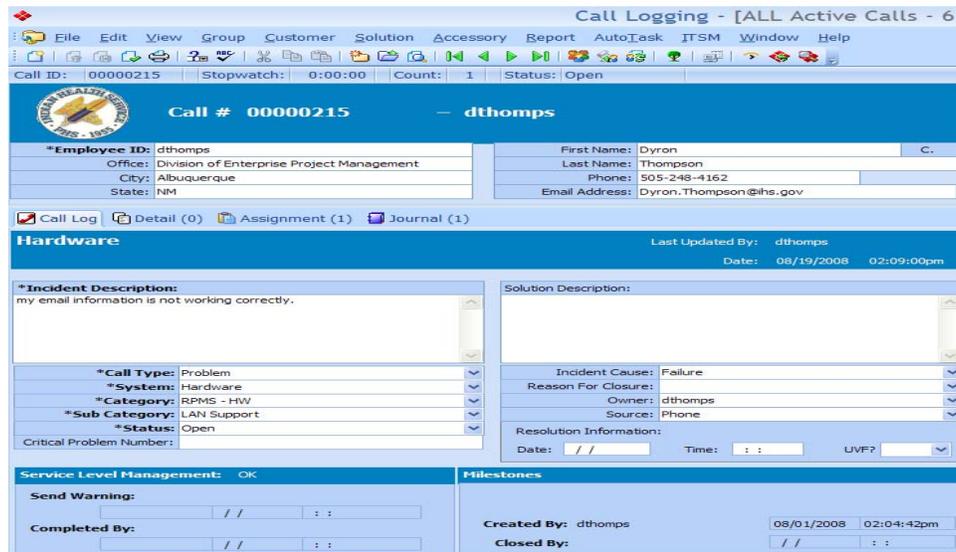


Figure 3-1: Call Ticket

3.3 View Assignments

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

To view the assignments for a ticket:

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

The selected ticket's assignments appear in the lower pane as shown in Figure 3-2.

The screenshot shows the 'Alert Monitor - At My Desk - [ALL Active Calls]' window. The top pane displays a table of call group details, and the bottom pane displays a table of assignments for the selected call (00000120).

CallID	CustID	CustType	CallStatus	CallType	Category
00000112	dthomps	Employee	Open	Problem	Networking
00000119	dthomps	Employee	Open	Problem	Websense
00000120	dthomps	Employee	Open	Critical Problem	
00000141	dthomps	Employee	Reopened	Problem	Networking
00000202	dthomps	Employee	Open	Service	Websense
00000214	dthomps	Employee	Open	Problem	E-mail
00000215	dthomps	Employee	Open	Problem	Networking

Assignee	Availability	GroupName	DateAssign	TimeAssign	AssignedBy	TargetDate
Antonio Mara	9 - 5 MT	Admin	07/31/2008	10:30:00am	Admin	/ /
Antonio Mara	9 - 5 MT	Admin	07/31/2008	10:20:00am	Admin	/ /

Figure 3-2: View of ticket assignments

2. Scroll to the right to view additional assignment details.
3. Change the sort order by clicking the column heading to toggle between ascending and descending order.
4. Resize the columns by moving 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.
5. Click Save to save the column layout for the selected alert group. To change the column widths in your other alert groups, repeat the column resizing for column individually.

3.4 Viewing the Journal Summary

The Journal is a free text field to capture pertinent information regarding the ticket, such as email text, steps taken, user input, and so on. 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 must open the ticket in Call Logging. (Double click the ticket number to open the ticket in Call Logging.)

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. Select **View > Journals** from the menu bar.

A summary of all the journal entries appears.

3. Scroll to the right to see the first part of the journal entry and view the journal entry text.
4. Click the column heading to toggle the sort order between ascending and descending order.
5. Click **Print** to print a journal summary. Be sure to change the paper layout to Landscape in the print dialog box.

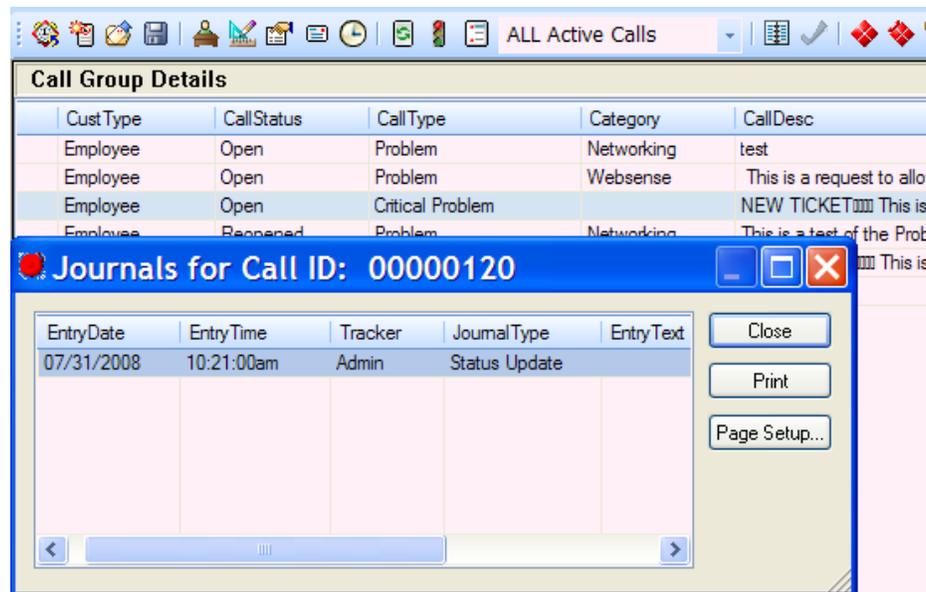


Figure 3-3: Journal dialog box example

4. Launching Call Logging

To work and manage your tickets, you must open the Call Logging Module.

To Open Call Logging from the Alert Monitor, click the Launch Call Logging button, as shown in Figure 4-1.

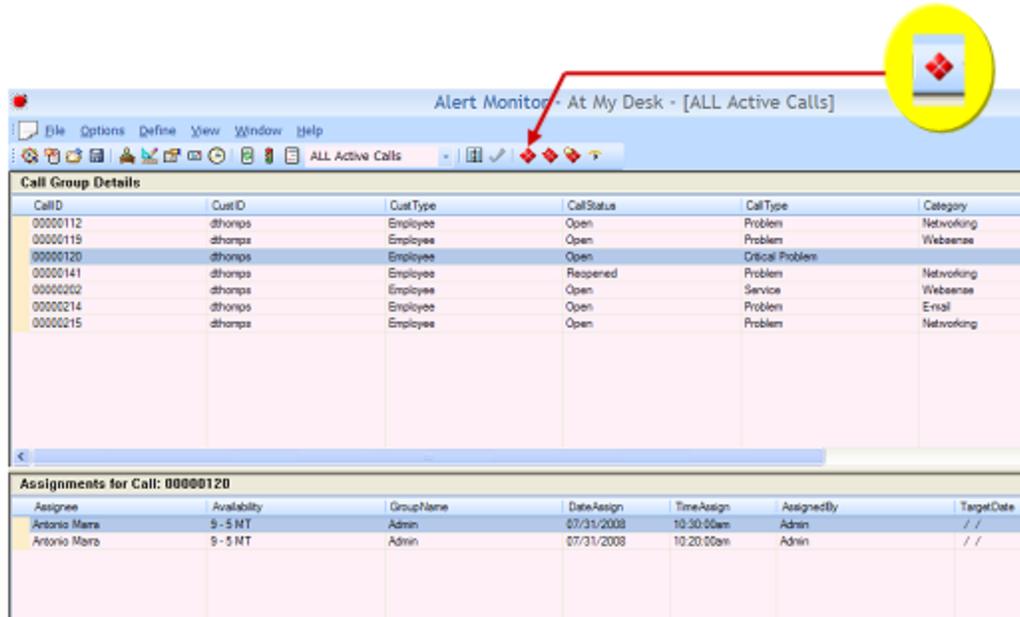


Figure 4-1: Launching call logging

4.1 HEAT Dashboard

Call Logging opens by default to the Dashboard utility. The Dashboard displays information on the user's group and important Broadcasts (messages that impact HEAT users).

Using the tabs in the lower section of the screen, displays an overview of three different sorting options of all tickets in the HEAT system:

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

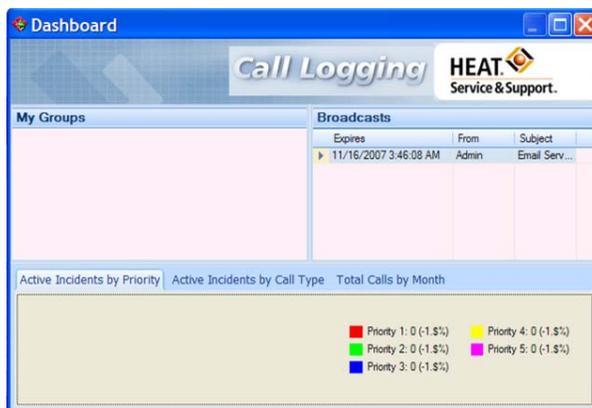


Figure 4-1: HEAT Dashboard screen

After you log into Call Logging, you may have the Dashboard show, or close it as you choose. See Figure 4-2.

1. To open the Dashboard at any time, select **View > Dashboard** from the menu bar.

2. To close it, click Close (X) in the upper-right corner of the window.



Figure 1-2: Sample of opening or closing dashboard

3. The Call Logging window shown in Figure 1-3 appears.

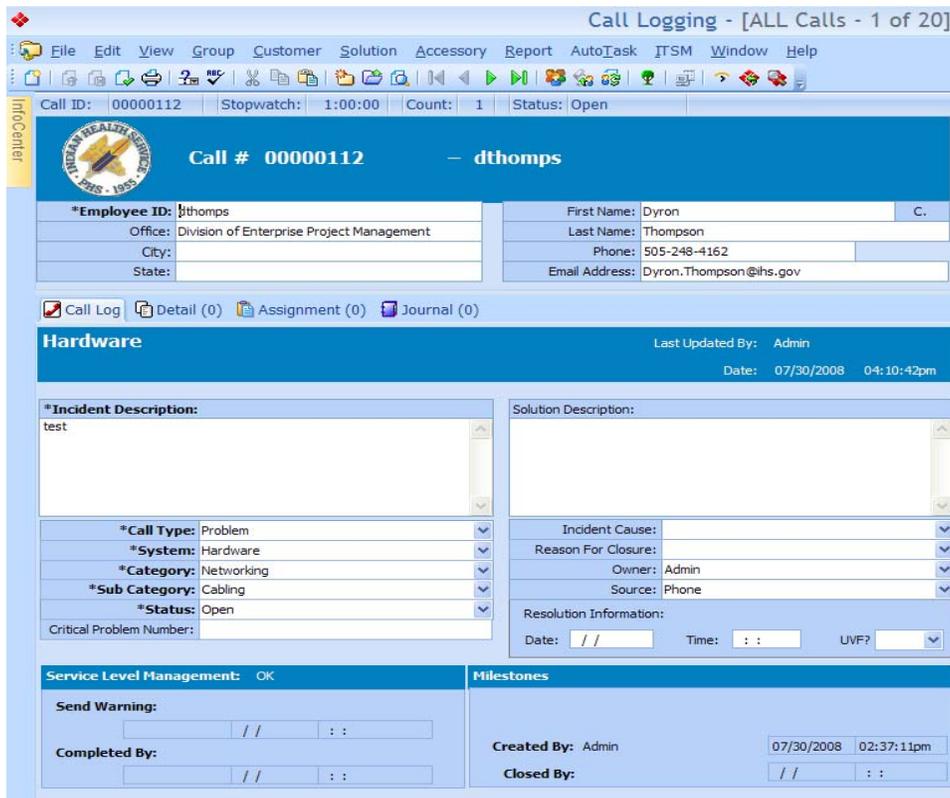


Figure 1-3: Call Logging window

4.2 Creating a Ticket

The following procedure provides instructions for creating a ticket.

To create a ticket:

1. Click Launch Call Logging shown in Figure 1-4 from the Alert Monitor.



Figure 1-4: Launch Call Logging button

The Call Logging window appears.

2. Select **File > New Call Record** from the menu bar or click New Call Record shown in Figure 1-5.



Figure 1-5: New Call Record button

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

The following conditions may occur:

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

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 these fields as necessary by clicking Customer Profile shown in Figure 1-6 or by pressing **F5**.



Figure 1-6: Customer Profile button

5. Click **Caller History** (shown in Figure 1-7) to determine if there is already an open ticket for this problem or service request for this customer.



Figure 1-7: Caller History button

- If there is an existing ticket, either update or reopen the ticket or abandon the ticket. Otherwise proceed with the next step.
6. Close the Customer window to return to the call record.
 7. Fill in the **Affected Site** (site affected by the problem), **Point of Contact**, and **POC Phone number**.

Note: This information may be different than the customer information above if the customer is calling about a site other than their own.

8. Choose the appropriate Call Type by clicking the dropdown arrow by that field.

The majority of the calls are either Service or Problem calls. See Table 1-1 for more information.

Table 1-1: Call Types and Examples

Call Type	For
Service	<ul style="list-style-type: none"> • A customer requested modification that impacts a limited number, typically 10 or fewer, customers. <p>Examples:</p> <ul style="list-style-type: none"> • Moving desktop workstations • Creating Novell accounts • Loading software • Creating a web page • Provision of cellular phones or Blackberries
Problem	<ul style="list-style-type: none"> • 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. <p>Examples:</p> <ul style="list-style-type: none"> – 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

Call Type	For
Change	<ul style="list-style-type: none"> • Planned modification to production hardware or software that impacts/supports a significant number of customers – typically more than 10. <p>Examples:</p> <ul style="list-style-type: none"> • Upgrading servers • Installing software to an entire Indian Health Service unit • Maintenance of network routers
Critical Problem	<ul style="list-style-type: none"> • 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.

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.

Since 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 is to change the Call Status to Monitoring, and to enter the Resolution Information Date and Time as of when the technician thinks the ticket was resolved.

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

11. Complete the remaining fields as they pertain to the service call you received as shown in Figure 1-8.

Figure 1-8: Call Log tab in a new ticket created in Call Logging

Additional information is provided in the Table 1-2.

Table 1-2: Journal Fields and Values

Field	Value
Source	Choose the source that best describes how the customer requested a service or change, or reported a problem.
Incident Description	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.

12. Click **Detail** tab and complete the information.

The Detail tab’s form varies based on the ticket Call Type. An example of the Detail RPMS Problem Screen appears when the Problem call type is selected. Figure 1-9 is provided as an example.

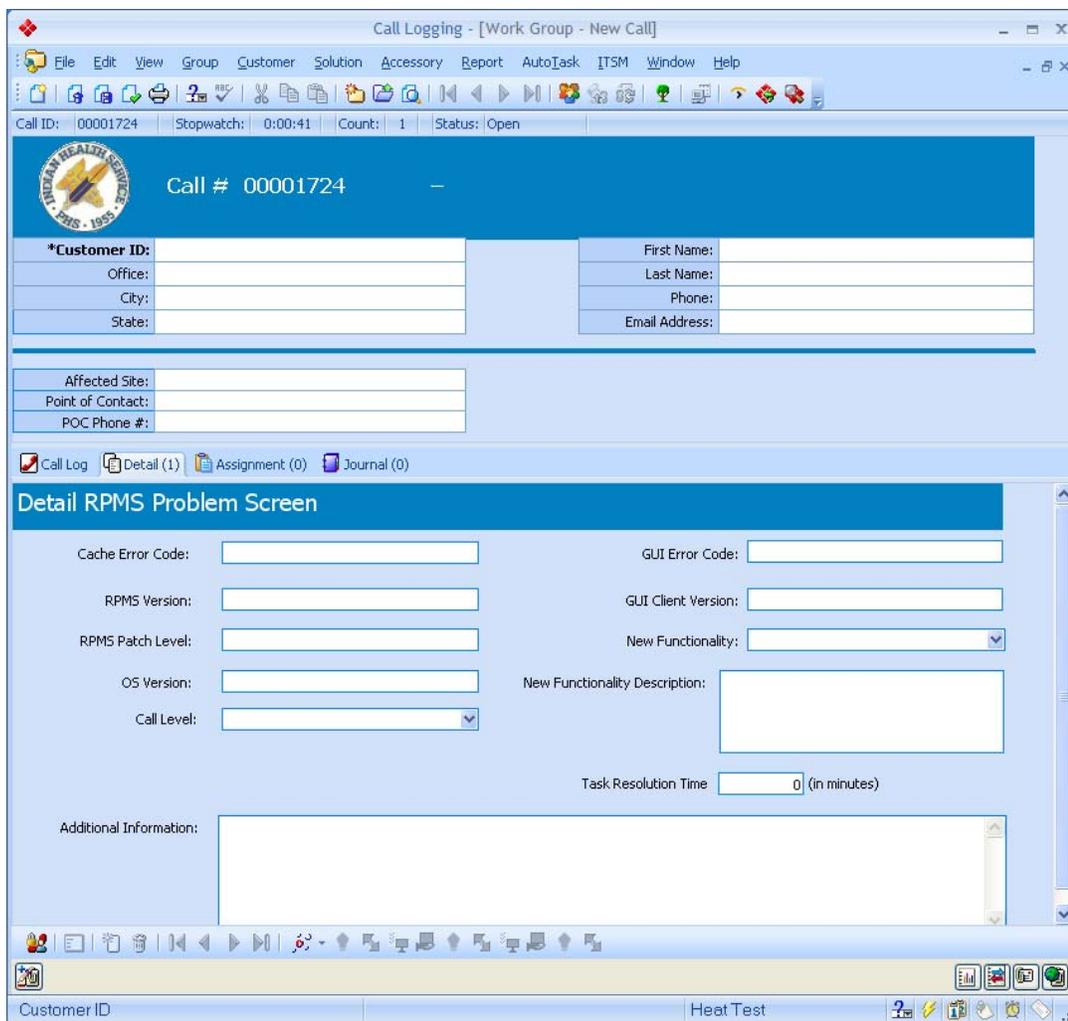


Figure 1-9: Detail RPMS Problem Screen

Table 1-3 shows the call type and the corresponding fields.

Table 1-3: Call Type and Related Fields

Call Type If you select:	Detail Tab Fields
Service	<ul style="list-style-type: none"> • Date Required and Time Required. 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. • Estimated Completion Date. Leave blank. The should complete these fields after obtaining all the necessary information from the customer in order to provide this service.
Problem	<ul style="list-style-type: none"> • GUI Error Code. If the call pertains to an error in the GUI Scheduling application (i.e. Scheduling, Behavior Health GUI), enter the EXACT error message here.

Call Type If you select:	Detail Tab Fields
	<ul style="list-style-type: none"> • Cache Error Code. If the call pertains to a traditional command line RPMS application like PIMS, Patient Registration and not a GUI interface, enter the EXACT code here. The format should be similar to this: <UNDEFINED>NMCH+10^AGZNDXP • RPMS Version. Enter the version of RPMS the customer is running. • GUI Client Version. Enter the version of the client computer the customer is running. • RPMS Patch. Enter the Patch number the client computer is running • OS Version. Enter the Operating System Version the customer is running. • New Functionality. Select yes if the call is a change or enhancement request. Select no if the call is not an enhancement, but rather a fix. Select N/A if neither applies. • New Functionality Description. If yes is selected in New Functionality, enter the details of the new functionality here. • Call Level: (to be entered by RPMS HEAT technician) Enter the Tier level of the call as follows: <ul style="list-style-type: none"> – Tier 1. Provided at the site level such as password resets, desktop support, and other common issues. – Tier 2. Provided by the Area IT office-examples include installation assistance of software, patches and updates, installation of LAN equipment, ect. – Tier 3. Provided by IHS OIT. Advanced level of support related to hardware, software, and telecommunications. Examples include troubleshooting of IHS-developed software (including RPMS, GUI Scheduling, ect.) maintenance of OIT-managed servers and WAN equipment and circuits. • Task Resolution Time: This is the actual time the technician spends actively working the ticket. It should be updated in minutes. For example, if you spent 15 minutes troubleshooting the issue, enter 15 min and save the ticket. Then if you went back in at a later time and worked the issue another 10 minutes, update the field to say 25 minutes, and so on. • Additional Information: Enter all other pertinent information here, such as other errors, specific details about the problem, other COTS applications running, ect. See Appendix D for additional troubleshooting questions to ask the customer. The goal is to get as much detail about the issue as possible upfront.
Change	<ul style="list-style-type: none"> • Change Type. Choose the most applicable. • Date Scheduled. The planned date for implementing the change. Indian

Call Type If you select:	Detail Tab Fields
	<p>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.</p> <ul style="list-style-type: none"> • 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 disrupted. If you are unsure, choose N/A. • 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. <ul style="list-style-type: none"> – 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 to this ticket for review by the CCB: <ul style="list-style-type: none"> – 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.
<p>Critical Problem</p>	<ul style="list-style-type: none"> • Customer Impact Desc. Enter a brief description that will explain to the technician(s) the impact the problem is having on the customers. • 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. • Impact Organization. Choose the value which best describes the units affected by the problem. <ul style="list-style-type: none"> – 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.

Call Type If you select:	Detail Tab Fields
	<ul style="list-style-type: none"> – 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.

13. Click the **Assignment** tab. The tab area is blank.

14. Right click the Assignment tab and choose New Assignment.

15. Complete the assignment information shown in Figure 1-10 as follows:

- **Group**—choose the group to which the HEAT technician belongs who will be working the ticket.
- **Contact**—choose the HEAT technician you wish to assign the call to. The technician's information defaults.
- **Comments**—enter any information that will be helpful for the technician to complete the assignment that is not recorded in the Incident Description or does not warrant a journal entry.

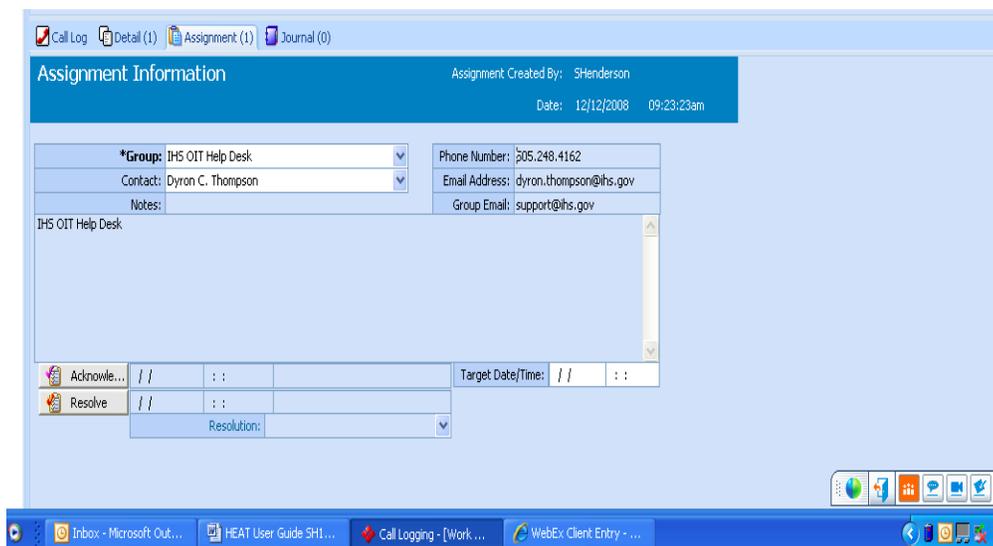


Figure 1-10: Assignment Information

16. If more than one technician works on this call, create another assignment for each technician by repeating Step # 13-15.

17. Select **Save > Save Call Record**, or click Save Call Record (shown in Figure 1-11).



Figure 1-11: Save Call Record button

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

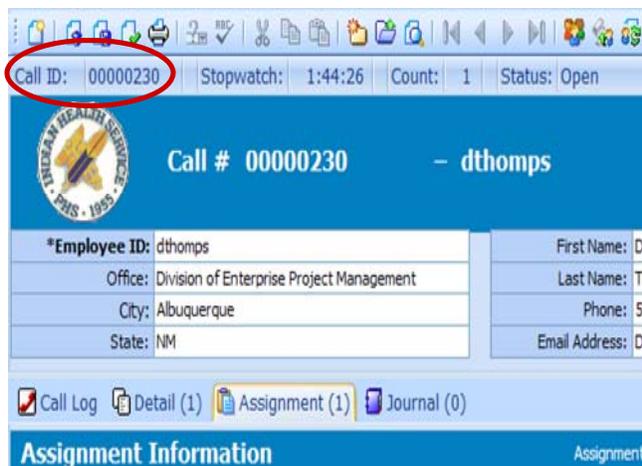


Figure 1-12: Sample ticket showing assigned Call ID (ticket number)

4.3 Putting 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 or start a ticket while you await additional information before assigning the ticket. The maximum number of calls you can simultaneously place on hold is 15.

To place an unsaved ticket on hold:

Choose **File > Put Call on Hold** from the menu bar without saving the ticket.

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.

Once a call has been placed on hold an existing ticket may be viewed or a new ticket can be created.

4.4 Retrieving a Ticket from Hold

The following procedure provides instructions for retrieving a ticket that was previously placed on hold.

To retrieve a ticket placed on hold:

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

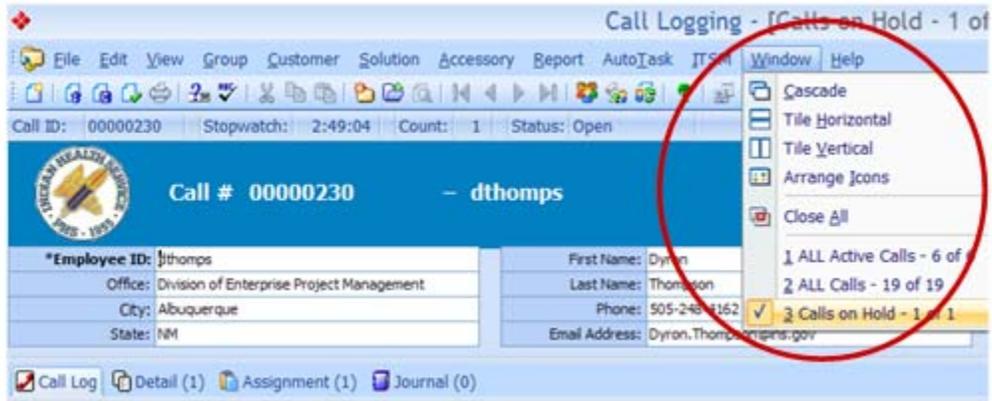


Figure 1-13: Sample of calls on hold window

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

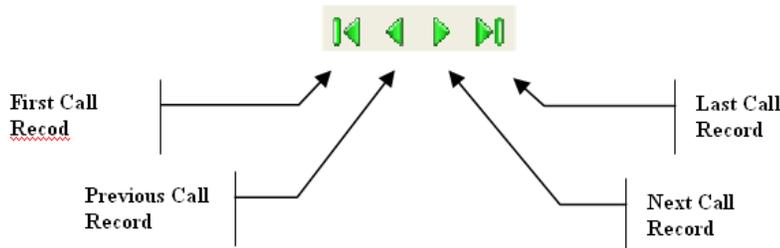


Figure 1-14: Moving between calls using the arrows

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

4.5 Opening an Existing Ticket

HEAT tickets may be opened in several ways.

- 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.

To open a specific ticket in Call Logging:

1. Choose **File > Go To Call ID** from the menu.
2. Type the ticket number in Call ID field.

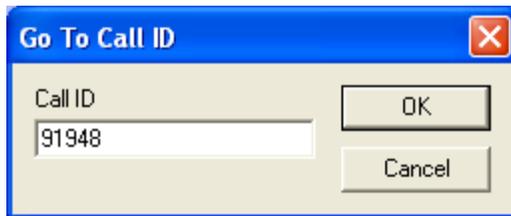


Figure 1-15: Sample of screen used to enter call ID

3. Click **OK** to open the ticket

4.6 Acknowledging a Ticket

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.

To acknowledge a ticket:

1. Open the ticket.
2. Click the **Assignment** tab.
3. Click **Acknowledge...** in the lower portion of the Call Logging screen.

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

Call Log | Detail (0) | Assignment (1) | Journal (0)

Assignment Information Assignment Created By: WDuran
Date: 08/20/2008 11:38:59am

*Group:	RPMS H/W	Phone Number:	505 248 1111
Contact:	Wylie Coyote	Email Address:	wylie.coyote@ihs.gov
Availability:	Monday - Friday		
Target Date/Time:	/ / : :		
Acknowledge...	09/12/2008	10:57:07am	tgeneviene
Resolve	/ /	: :	
Resolution:			

Figure 1-16: Sample of entering acknowledgement information

4. Click **Save Call Record** shown in Figure 1-17.



Figure 1-17: Save Call Record button

4.7 Resolving 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, see Reassigning a Ticket for more information.

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.

To resolve an assignment:

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

The Enter Value window opens.

5. Click the dropdown arrow, and select either Completed or Reassigned as appropriate.



Figure 1-18: Sample of entering value to resolve ticket

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

6. Choose Completed in the Resolution field.

Notes: If the technician does not need to perform any work related to a ticket, including reassigning the ticket, choose Completed in the resolution field.

Conditions that can result in this include (1) customer fails to provided need info. After the technician notifies the customer, the ticket can be closed. (2) customer cancels a request for service; (3) multiple tickets were created for the same issue, and the assignment was extraneous.

7. Click **Save Call Record**.

If all assigned tasks from the ticket are complete, the ticket can now be closed. See Closing a Ticket for more information.

8. Select Reassign in the Resolution code if the ticket has other tasks that need to be completed by another technician. See Creating a New Assignment for additional information.

4.8 Creating 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. To create a new assignment, see step 13 of Creating a Ticket.

4.9 Reassigning a Ticket

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 to 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 assign them to someone on 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 finish your assignment, do not reassign it to someone else. Instead you should resolve your assignment (see Resolving an Assignment for more information) and create a new assignment (see Creating a New Assignment for more information).

To create a new assignment:

1. Open the ticket.
2. Click the **Assignment** tab.
3. Click **Resolve**.



Figure 1-19: Resolve button

4. When the Enter Value window appears, use the dropdown arrow to select the appropriate resolution code. Select **Reassigned**.
5. Click **Validate**. The Validate from Resolved window appears showing the resolution and description.
6. Click **OK**.

You are returned to the Enter Value window.

7. Click **OK**.

8. 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.
9. Click **Save Call Record**.
10. Create a new assignment as described in step 13 of Creating a Ticket.

<p>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.</p>

4.10 Changing a Ticket's Status to Monitoring

There may be certain situations that warrant monitoring of a fix or change to ensure the issue was resolved and no additional problems exist. In this case, you would change the ticket's status to Monitoring.

4.11 Updating a Ticket

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.

To update a ticket's status and information:

1. Open the ticket.
2. Update the ticket's information.
3. The following table provides additional information.
4. Click **Save Call Record** after you complete all updates.

Update the...	Guidance
<p>Call Log tab</p>	<ul style="list-style-type: none"> • 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 <i>Call Status</i> before closing a ticket. <ul style="list-style-type: none"> – 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 tickt was being monitored. • The Status/Solution are the primary fields that the technician refers to check a ticket’s status: <ul style="list-style-type: none"> – 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.
<p>Detail tab</p>	<ul style="list-style-type: none"> • You may update or correct any information on this tab. • For service tickets, the technician should update the <i>Date Customer Info Provided</i> and <i>Time Customer Info Provided</i> fields. <ul style="list-style-type: none"> – If additional information was required before the service could be provided, enter the date and time when that information was obtained. – 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 Reassigning a Ticket.
Journal tab	Add detailed information about the ticket and progress.

Table 1-4: Updating Assignment tabs

4.12 Adding 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.

To add a journal entry:

1. Open the ticket from the Call Logging window.
2. Click the **Journal** tab.
3. Go to the Journal Type box and 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 Figure 4-20. You may also edit existing journal entry text.

Error! Reference source not found. Figure 4-20: Sample of creating a journal entry

5. Run a spell check on your journal entry by right clicking in the Journal Entry area and choose **Spell Check**. 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.

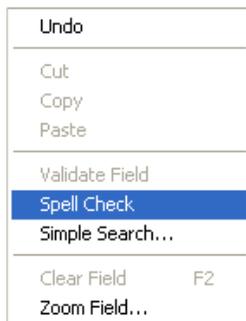


Figure 1-20: Selecting Spell Check

If necessary, you may abandon changes to the current journal entry by clicking Abandon Record shown in Figure 1-21, located on the menu bar.



Figure 1-21: Abandon Record button

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

6. Click **Save Call Record** icon, or go to **File>Save Call Record** to save your journal entry.

4.13 Closing a Ticket

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 information to it (e.g. journal entries). Once a ticket is closed, its information cannot be changed without reopening the ticket.

To close a ticket:

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 is not lost during future ticket updates, such as reopening a ticket.

Closing Tickets

For all tickets, click the **Detail** tab to display Detail Screen, and update the all the required information here.

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 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 attempts on three different days, the customer has not 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 Assignee** 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.
 - **Canceled by Customer** occurs when the customer decides the problem or service requested is no longer an issue and/or the request was done in error.
 - **No Customer Response** is selected when several attempted calls or emails have been submitted for additional information from the customer and no response has been reciprocated
 - Otherwise, choose the most appropriate reason for the ticket not being completed as described in the Incident Description.
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. In the *Closed By* field enter the date and time.
9. Click Quick Close to change the ticket status to Closed.



Figure 1-22: Quick Close button

Call Logging - [ALL Calls - 19 of

File Edit View Group Customer Solution Accessory Report AutoTask ITSM Window Help

Call ID: 00000218 Stopwatch: 1:14:29 Count: 1 Status: Closed

Call # 00000218 - dthomps

*Employee ID: dthomps First Name: Dyron C.
 Office: Division of Enterprise Project Management Last Name: Thompson
 City: Albuquerque Phone: 505-248-4162
 State: NM Email Address: Dyron.Thompson@ihs.gov

Call Log Detail (1) Assignment (1) Journal (1)

Software Last Updated By: tgeneviene
 Date: 08/11/2008 11:06:58am

*Incident Description: test Solution Description: closed test.

*Call Type: Critical Problem Incident Cause: Other
 *System: Software Reason For Closure: Completed
 *Category: Anti-virus Owner: tgeneviene
 *Sub Category: Virus Outbreak Source: Phone
 *Status: Closed
 Critical Problem Number:

Resolution Information:
 Date: 08/11/2008 Time: 11:04:00am UVF? N/A

Service Level Management: OK

Send Warning: // : :
 Completed By: // : :

Milestones
 Created By: tgeneviene 08/06/2008 11:48:50am
 Closed By: tgeneviene 08/11/2008 11:06:58am

Figure 1-23: Sample of closed ticket

HEAT checks the ticket’s contents to see if all the assignments are resolved and all the mandatory fields completed. If not, a message box appears to remind you of required fields or actions that must be completed before you can close the ticket. Once all the requirements are met, you can close the ticket.

10. Confirm that the Call Status is Closed.
11. Save your work and click **Save Call Record** icon.

4.14 Reopening 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.

To reopen a ticket:

1. Open the closed ticket.
2. Choose **File > Reopen Call Record**.
3. Click **Yes** in the dialog box shown in Figure 1-24 to move the status to a journal entry. Otherwise, the old status information could be lost.

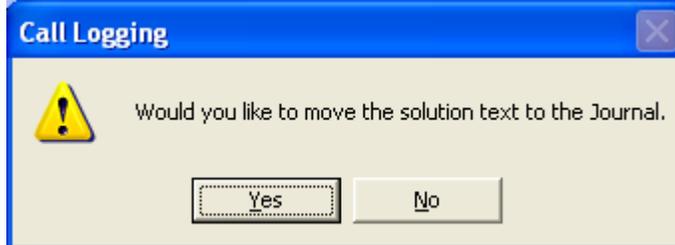


Figure 1-24: Moving text to a journal entry

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.

At the top of the screen, the status of the call is now Reopened.

4. Create a journal entry explaining the reason for reopening the ticket.

If you do not plan to immediately close the reopened ticket, create a new assignment for the ticket.

5. Click **Save Call Record**.

If you are finished updating the ticket and no further action is required, close the ticket as described in the Closing a Ticket.

4.15 Viewing Activity Log

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 technician who made the change along with the date and time.

To look at a ticket's history:

1. Open the ticket.
2. Go to **View > Activity Log** from the menu bar, or click Activity Log shown in Figure 4-26.

Figure 1-25

Figure 1-25: Activity Log for a particular call ID, and Activity Log button.

3. Click Help for more information about the column headings.

5. 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.

5.1 Viewing a Customer Profile

This procedure provides instructions for viewing a customer profile.

To look at a customer profile:

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 **Search**.

The examples show using the “like” operator. Searches for “like” matches that begin with the same as the value you entered. If you have a high level of confidence in your search criteria, you may use the equal sign (=) operator to find 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>

Examples:

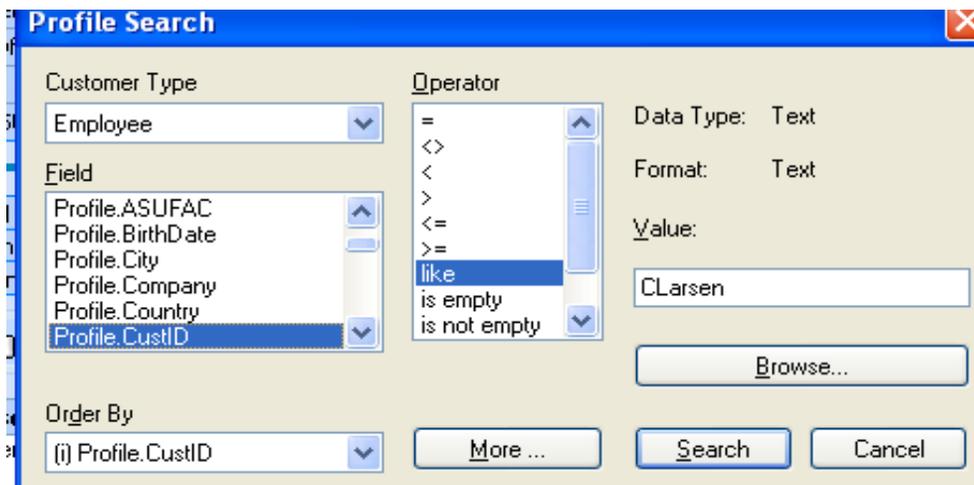


Figure 5-1: Sample of entering search criteria

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>

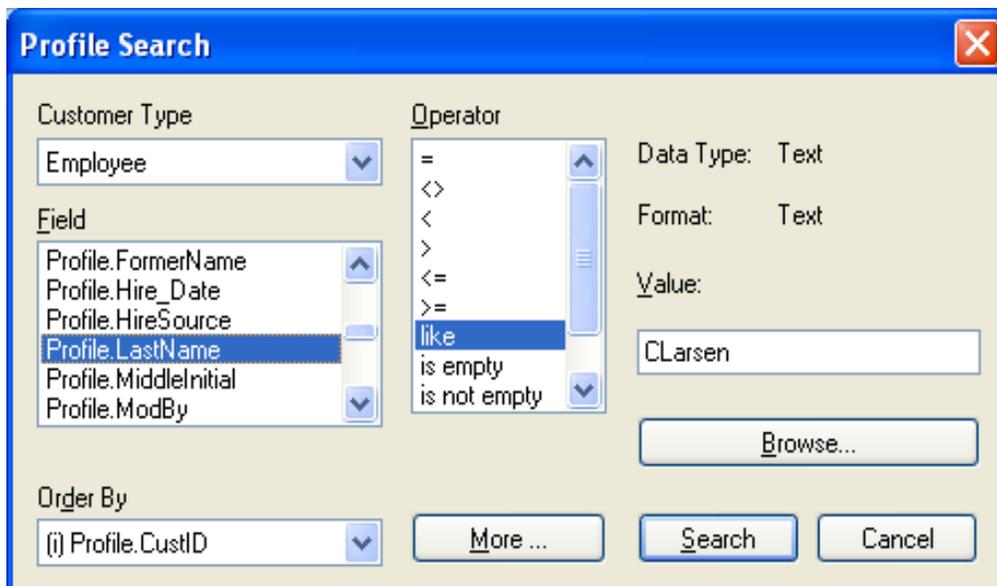


Figure 5-2: Sample of entering search criteria

5.2 Displaying 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.

To look at a customer's ticket history:

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



Figure 5-3: Customer Profile button

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	nwar	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	!!!MON!!! 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 5-4: 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.

5.3 Updating 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.

To update a customer profile:

1. Open a new or existing ticket for the customer.
2. Click **Customer Profile**
3. Go to the Profile tab. Here you may update all the information, except the HEAT ID.
4. Click **Save Customer Record** to save your updates.

5.4 Requesting 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.

5.5 Conducting a 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.

To conduct a simple search:

1. Open a ticket.
2. 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.

A menu appears.

3. Choose **Simple Search...**
4. 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 5-5: Simple Search options

5. 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.
6. Click the **Run** button. Only the calls that match your search criteria will appear.
7. 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.

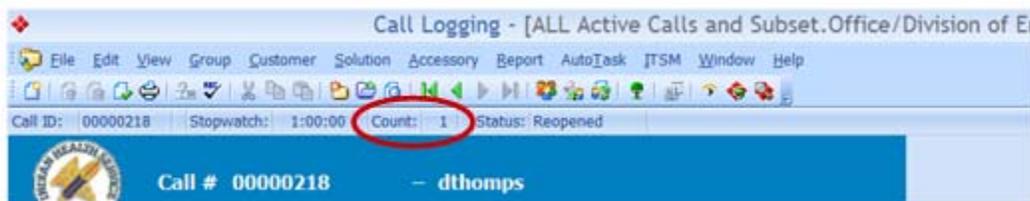


Figure 5-6: Sample of ticket found with search

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

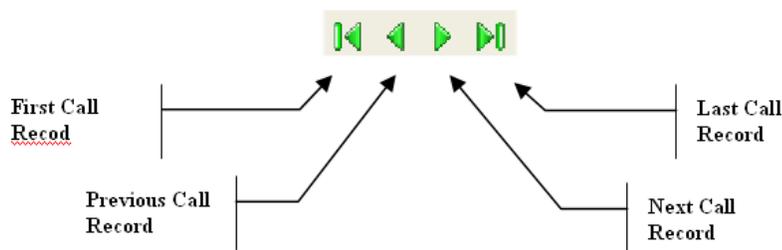


Figure 5-7: Illustration of using call record navigation

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.

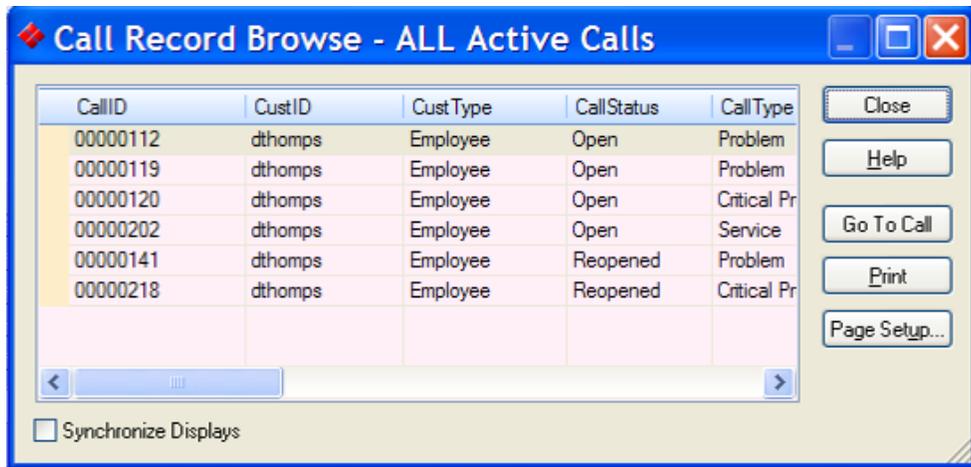


Figure 5-8: Sample of window showing summary of tickets found in search

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

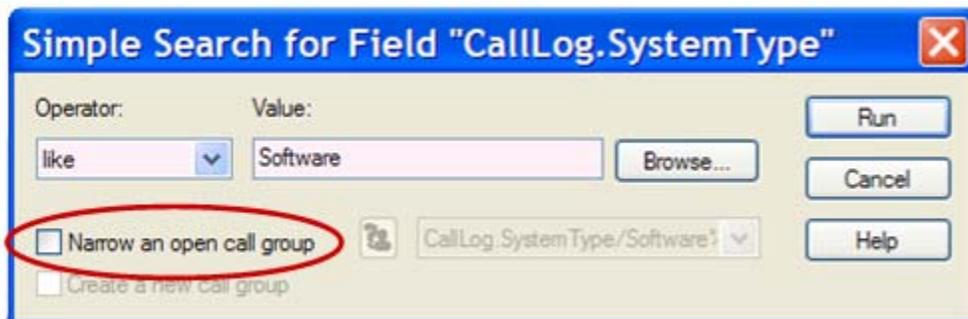


Figure 5-9: Sample of simple search of entire database

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.

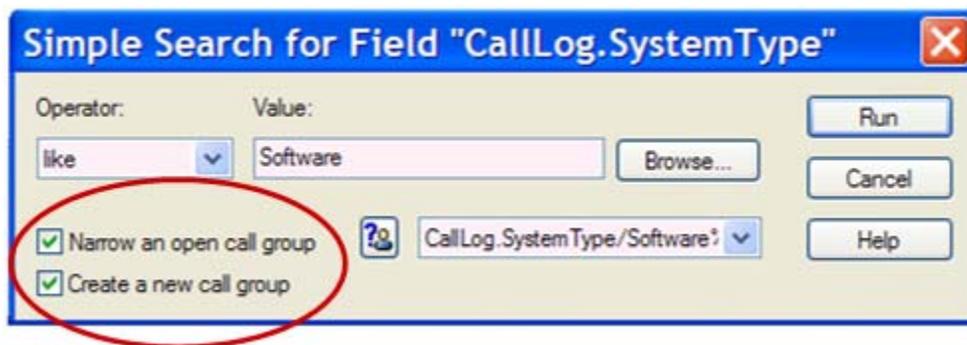


Figure 5-10: Sample of creating a call group for the search and narrowing a call group

6. 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.

6.1 Attaching a File

To attach a file to a ticket:

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

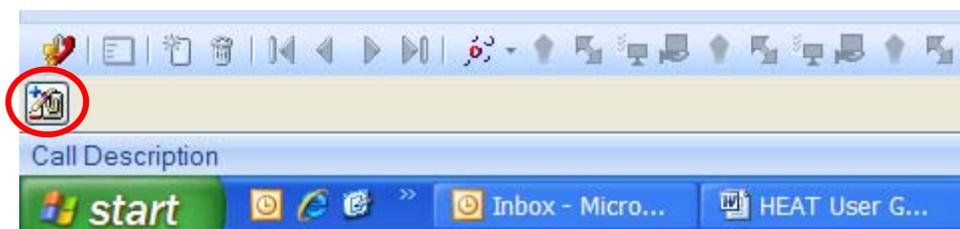


Figure 6-1: Attachment button location

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

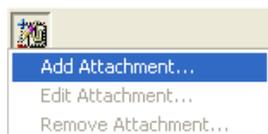


Figure 6-2: Selecting Add Attachment

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

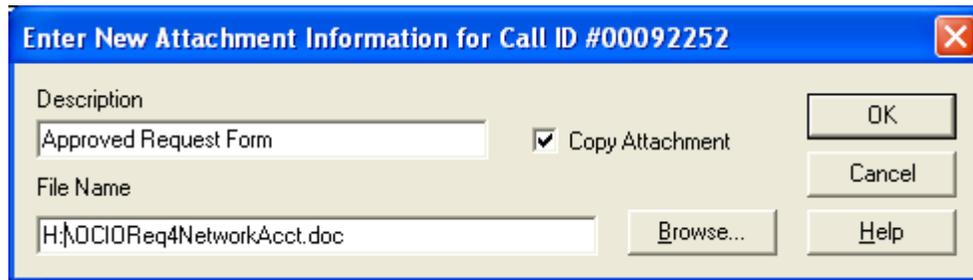


Figure 6-3: Enter New Attachment Information dialog box

5. Click **OK**. The attachment appears on the Attachment bar.



Figure 6-4 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.

6.2 Viewing an Attachment

To look at the attachments for a ticket:

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.

Note: 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.

6.3 Editing 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.

6.4 Removing an Attachment

To remove an attachment from a ticket:

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.

7. Tips and Tricks

7.1 Shortcut Keys: Call Logging

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

Table 7-1: Call Logging Actions and Shortcut Keys

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

7.2 Navigation Keys: Call Logging

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

Table 7-2: Navigation Actions and Shortcut Keys

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

7.3 Shortcut Keys: Alert Monitor

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

Table 7-3: Alert Monitor Actions and Shortcut Keys

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

7.4 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, the Status/Solution, and all journal entries.

To spell check the contents of a field:

1. Place the cursor in the text field you want to spell check.
2. Click **Spell Check** (shown in Figure 7-1).

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



Figure 7-1 Spell Check button

Spell Check feedback and correction options are provided, as shown in Figure 7-2.

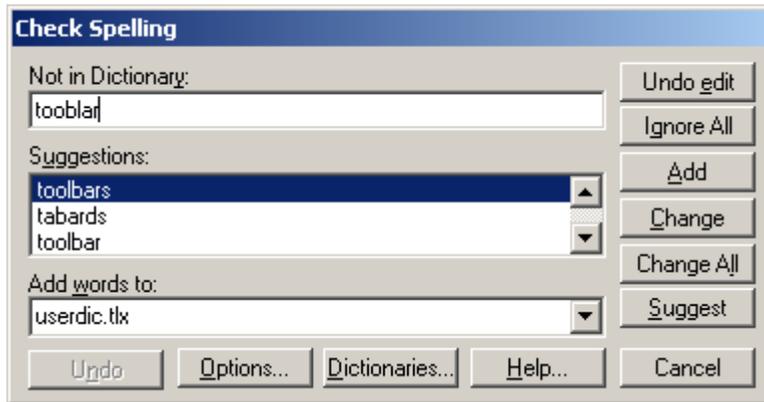


Figure 7-2: Sample of Check Spelling window

8. Troubleshooting

8.1 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 (for example 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.

9. Glossary

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.

DA

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.

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.

10. Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk (IHS).

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

Fax: (505) 248-4363

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

Email: support@ihs.gov

11. Appendix A: Call Groups

11.1 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.

11.2 Adding 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.

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

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



Figure 11-1: Sample of Start/Stop Polling button

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



Figure 11-2: Sample of tool bar with unavailable options

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



Figure 11-3: Sample of Define call group alerts button

A window opens displaying your currently selected call groups.

3. Click **New**.

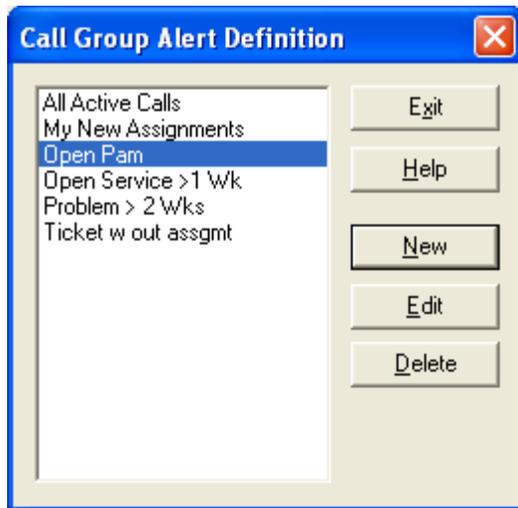


Figure 11-4: Call Group Alert Definition dialog box

The Define Call Group Alert window appears.

4. Click **Browse**.

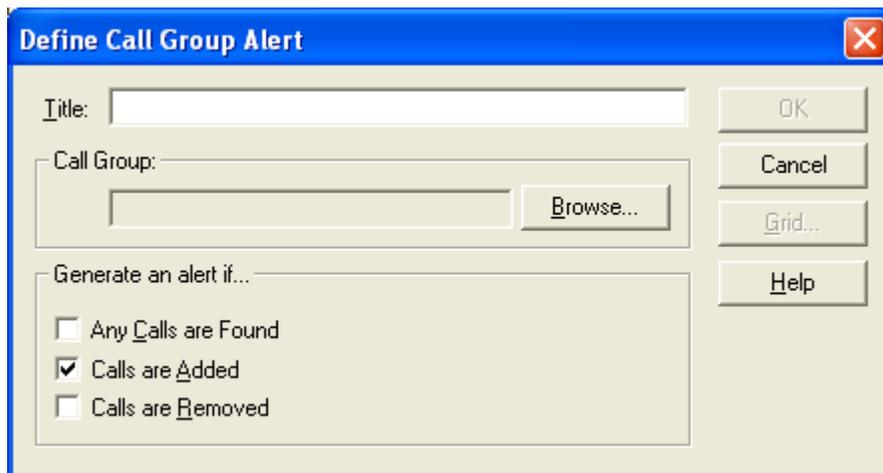


Figure 11-5: Sample of window showing Browse button

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.

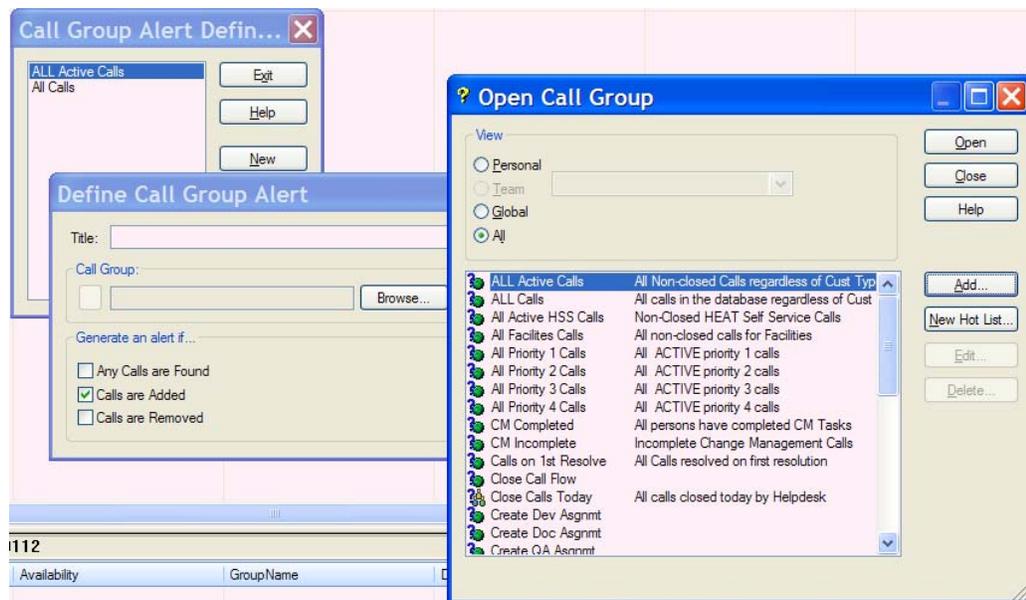


Figure 11-6: Open Call Group dialog box with preceding boxes open below it

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 I...
9. Select one of the three options provided by clicking the check-box as shown in Figure 11-7. Your choices are:
 - Any Calls are Found
 - Calls are Added
 - Calls are Removed

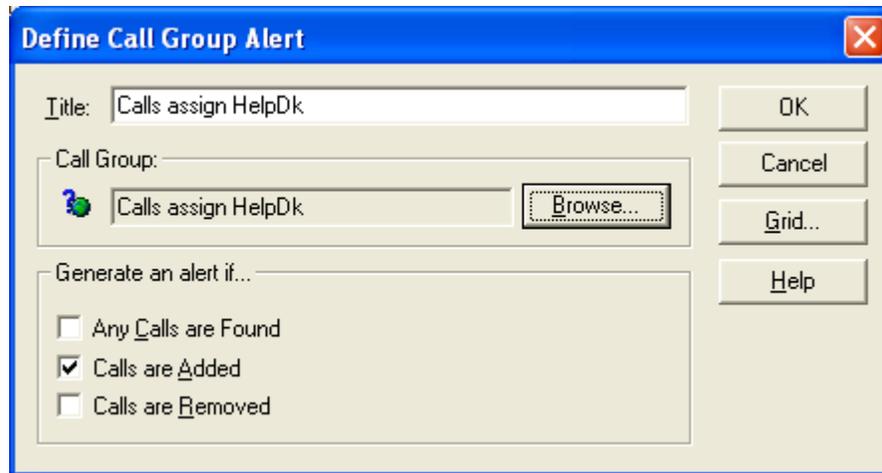


Figure 11-7: Define a Call Group Alert dialog box

10. Click **OK**.

11. Click **Exit**.

12. Click **Save**.

13. Click **Start/Stop Polling** (traffic signal button) to turn on polling.

11.3 Changing 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.

To change a call group's preferences:

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



Figure 11-8: Start/Stop Polling button

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

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



Figure 11-9: Sample of Define call group alerts button

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



Figure 11-10: Sample of choosing an alert group for editing

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

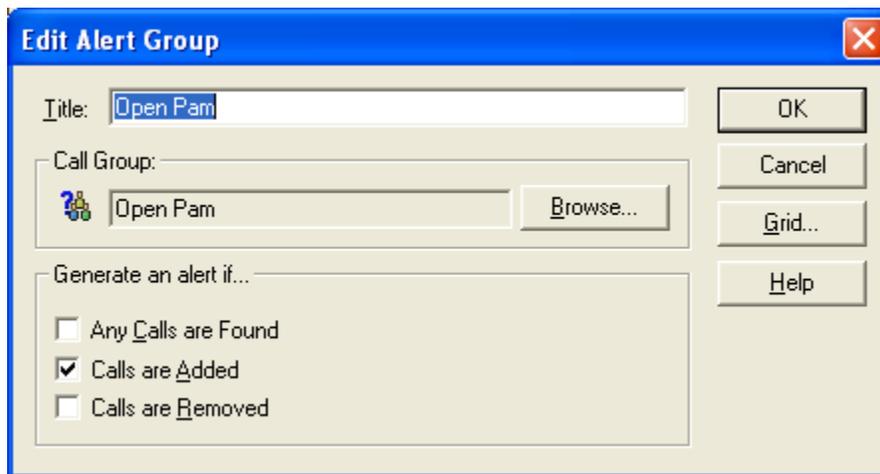


Figure 11-11: Sample of alert notification options

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.

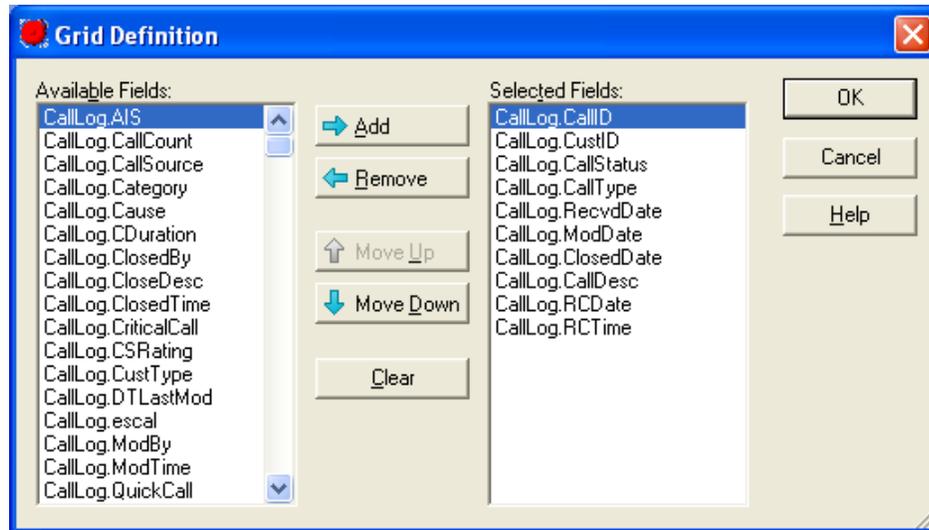


Figure 11-12: Sample of Grid Definition screen

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

11.4 Creating 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.

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

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



Figure 11-13: Sample of Start/Stop Polling button

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

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



Figure 11-14: Sample of Define call group alerts button

3. Click **New** on the Call Group Definition dialog box shown in Figure 11-15.

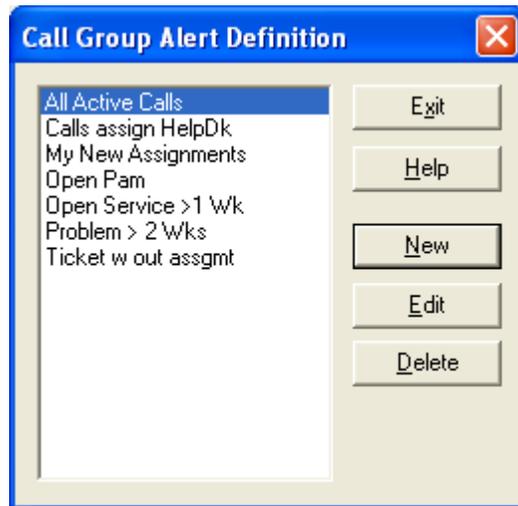


Figure 11-15: Call Group Alert Definition dialog box

The Define Call Group Alert dialog box shown in Figure 11-16 appears.

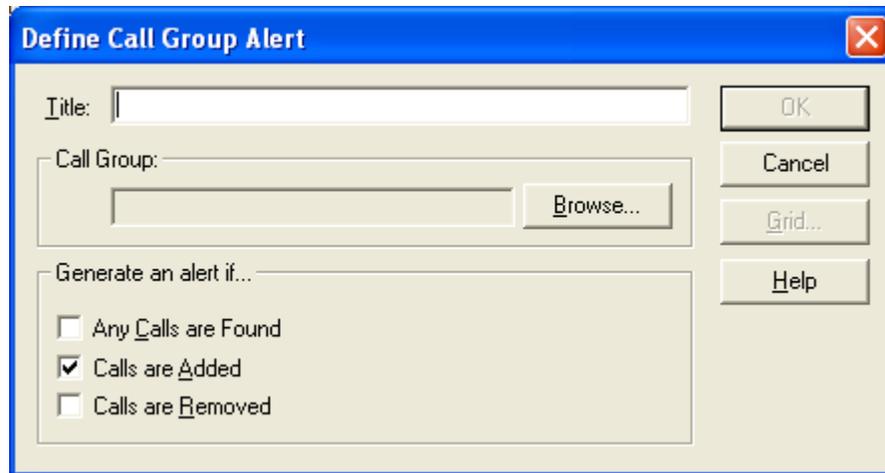


Figure 11-16: Sample of screen used to create a new call group

4. Click **Browse**.

The Open Call Group dialog box shown in Figure 11-17 appears.

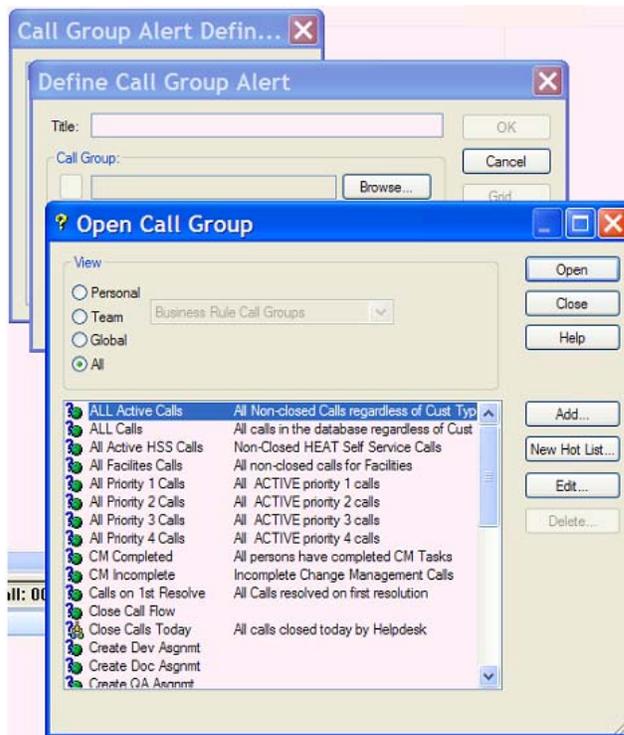


Figure 11-17: Open Call Group dialog box

5. Click **Add**.

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.

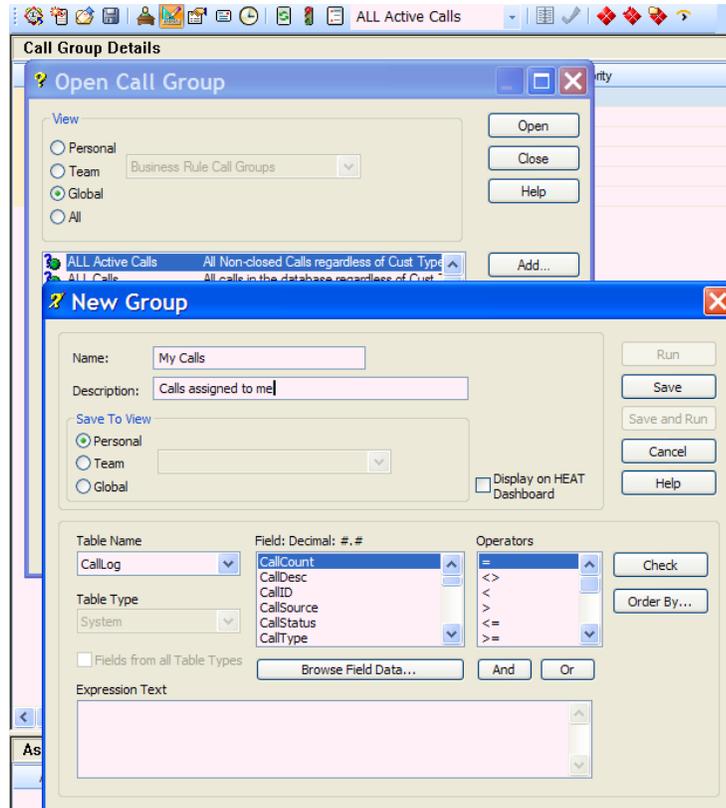


Figure 11-18: Sample of entering new group information

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.

11.5 Using Operators

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.

Table 11-1: Operators and Definitions

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

To create an expression using operators:

1. 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 11-18). On the left side of the New Group window, find Table Name. Use the dropdown box to select a table.
2. Double click the field containing the table you want to use. It will appear in the expression box.
3. Double click an operator. It will appear in the expression box.
4. Either click **Browse Field Data**, or type in a value to complete the expression. See the following example.

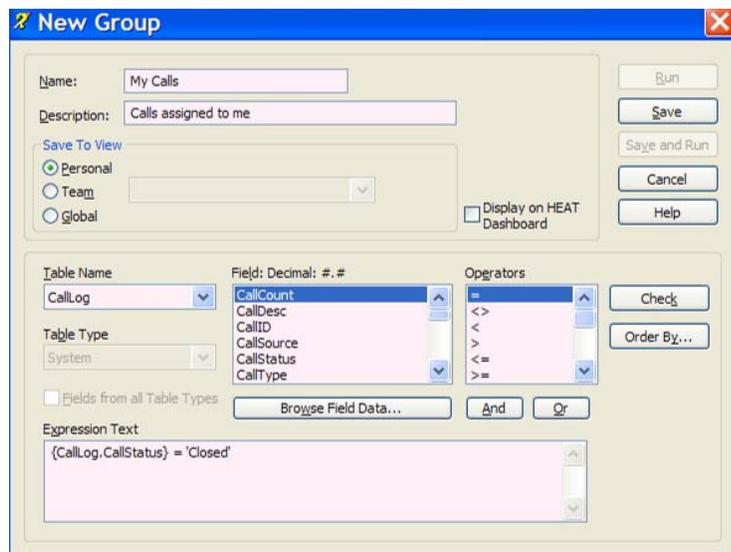


Figure 11-19: New Group dialog box where operators are used to create an expression

If you click the Browse Field Data button the Validate from Status dialog box appears.

5. Select the expression you want to use and click **OK**. You are returned to the New Group dialog box.

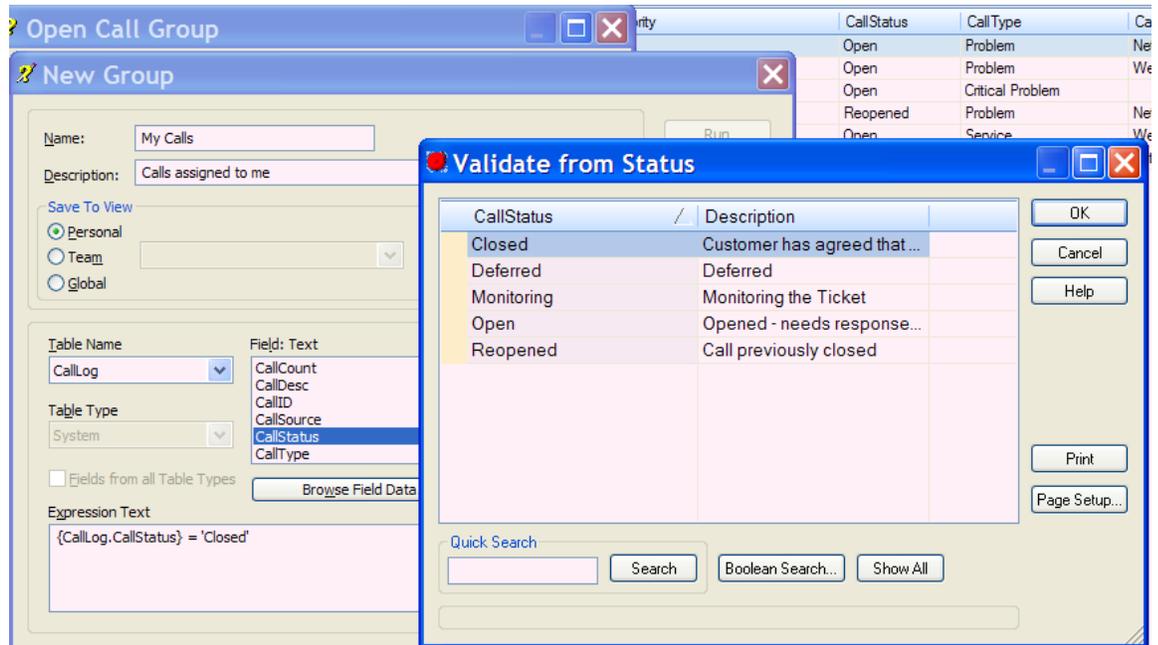


Figure 11-20: Sample of browsing field data to select an expression

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

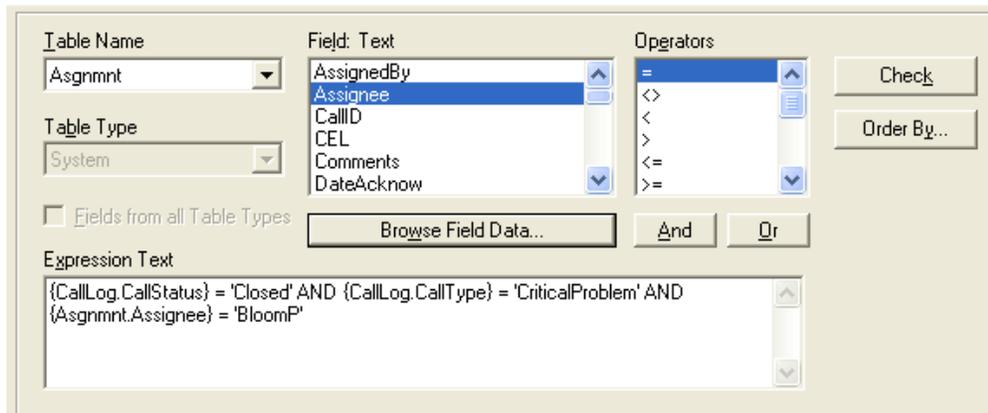


Figure 11-21: Sample of adding conditions

7. Click **Check** to verify that your expression works. If it does not work, you receive an error message indicating what needs to be corrected.

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

8. Click **Order By** to choose how to display the results in the call group.
9. Click the first field by which you want to sort the results and the radio button for either Ascending or Descending order.

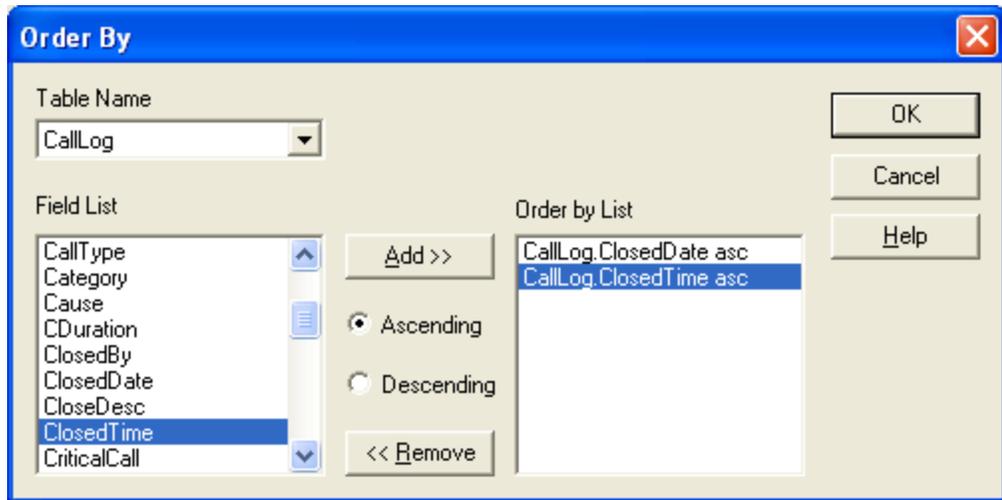


Figure 11-22: Order By dialog box

10. Click **Add >>** in the Order By dialog box.
11. Repeat the last two steps to add additional sorting parameters. The second parameter sorts the list within the order of the first parameter, and so on.

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

12. Click **OK**.
13. Click **Save** to save your new call group.

You have completed creating the call group. Now you must add it to your list of open call groups.

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

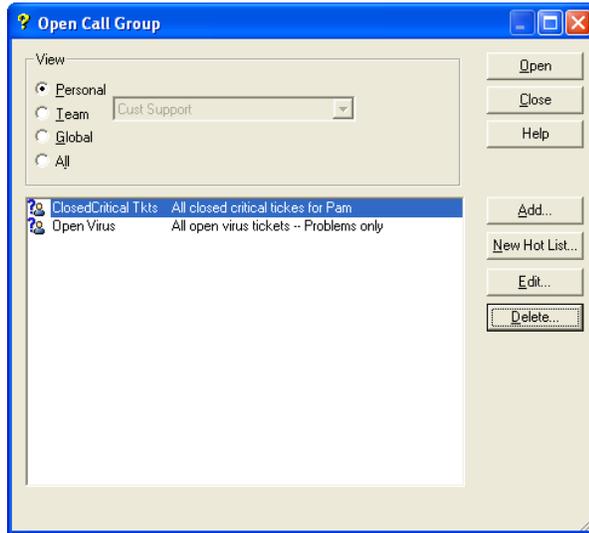


Figure 11-23: Sample of call group window

15. Click **Open** shown in Figure 11-23.

16. Choose one of the following options from the Define Call Group Alert dialog box shown in Figure 11-24:

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



Figure 11-24: Sample of generating call group alerts

17. Click **OK**.

18. Click **Exit**. A window for your new Call Group opens automatically.

19. Click **Save** to save the new call group to your list of open call group alerts.
20. Click **Start/Stop Polling** (traffic signal) to turn polling on again.

11.6 Changing 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.

To edit an existing call group:

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

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

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



Figure 11-25: Define call group alerts button

The Call Group Alert Definitions dialog box shown in Figure 11-26 appears.

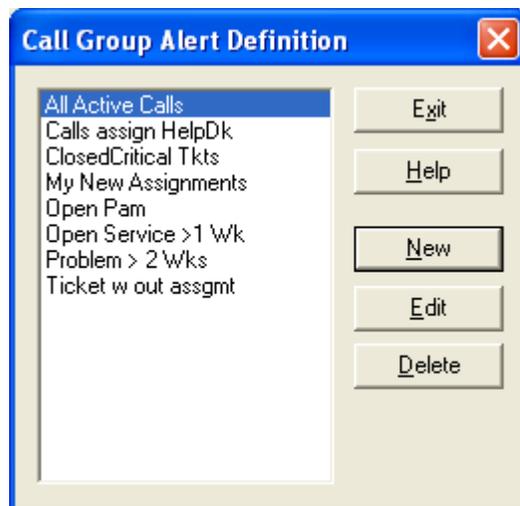


Figure 11-26: Call Group Alert Definition dialog box

3. Click **Edit**. The Edit Alert Group dialog box shown in Figure 11-27 appears.

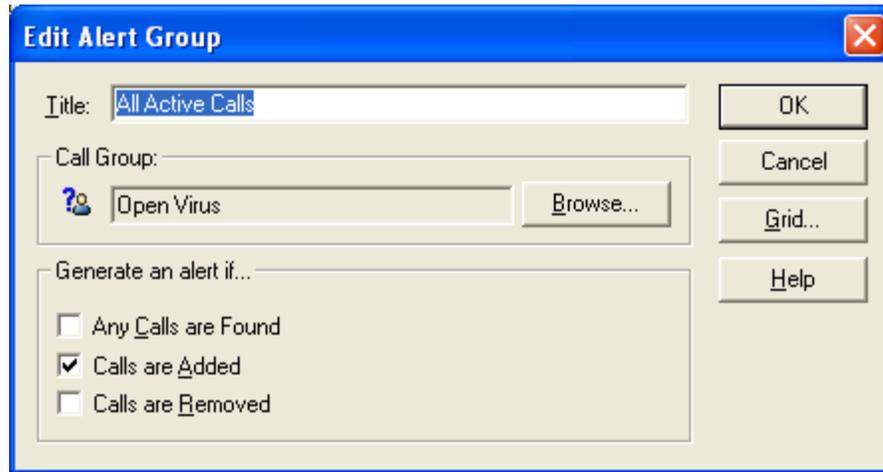


Figure 11-27: Edit Alert Group dialog box

3. Click **Browse....**

The Open Call Group dialog box shown in Figure 11-28 appears.

4. Click **Personal** then click the name of the call group you want to edit.

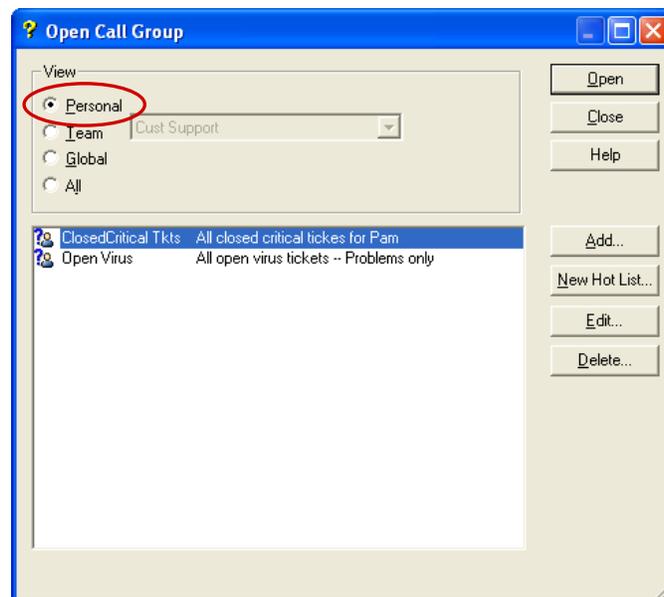


Figure 11-28: Open Call Group dialog box

5. Click **Edit....**
6. 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.

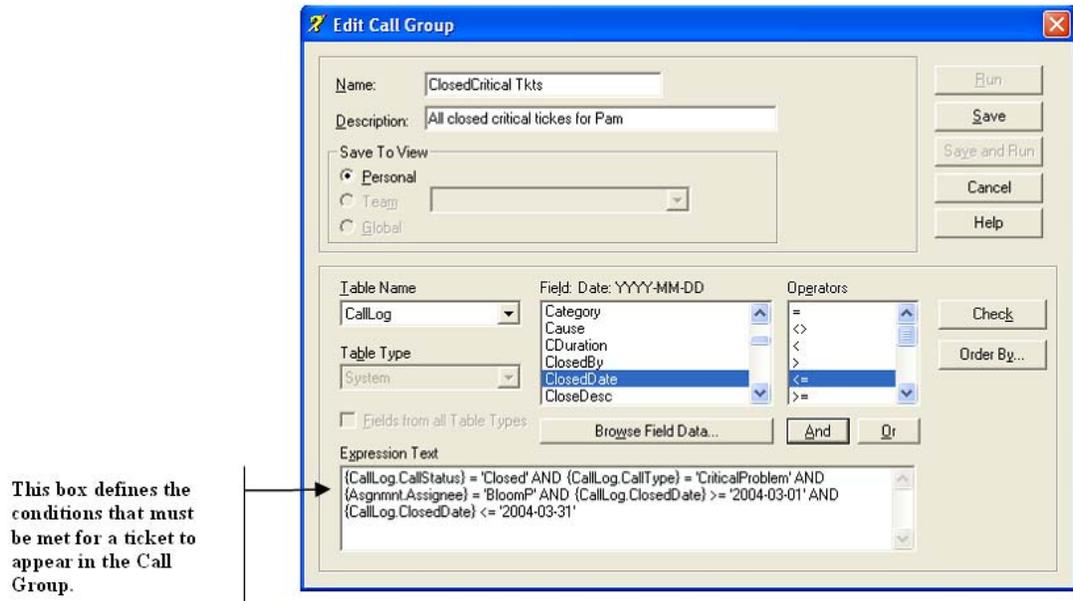


Figure 11-29: Edit Call Group dialog box

7. To edit the expression text, 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 Creating a New Personal Call Group.

8. Click **Check** to verify that your new expression works properly. If it does not, you receive an error message indicating what needs to be corrected.

9. Click **Order By...**, to display the Order By dialog box shown in Figure 11-30

10. Change how the results are displayed in the call group as follows:

- 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 **Add >>**.
- To remove a field, click the field you want to remove. Then click **<<Remove**.
- To change the order of the sort, you must remove all the Order by List entries and add them back in the correct order.

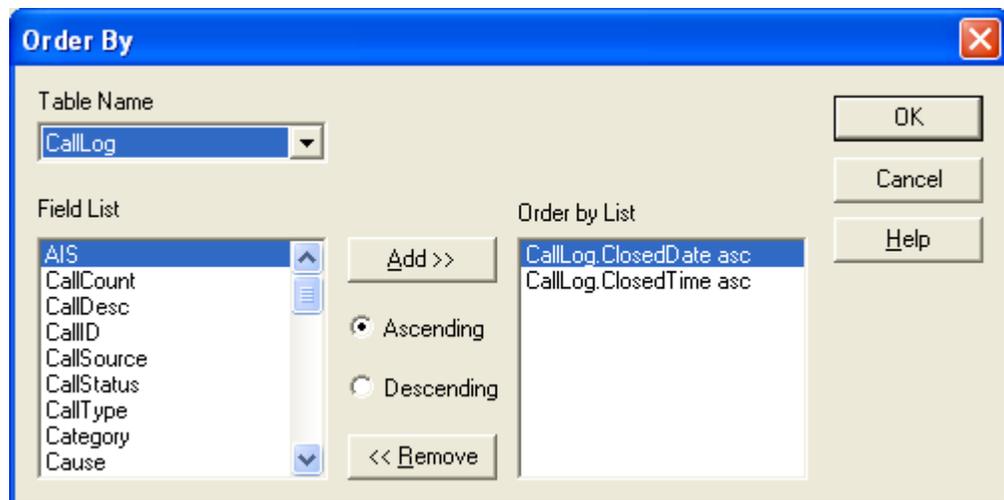


Figure 11-30: Order By dialog box

11. Click **OK** if you made changes you want to save.
12. Click **Save** to save the changes you made to the call group.
13. Click **Close**.
14. Click **OK**.
15. Click **Exit**.
16. Click **Start/Stop Polling** (traffic signal) to turn polling back on.

12. Appendix B: 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. 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.

12.1 Adding an AutoTask to Toolbar

This procedure provides instructions for adding an AutoTask button to your toolbar.

To add an AutoTask button to your toolbar:

1. From the menu, choose **AutoTask > Manage AutoTasks**, and the Manage AutoTasks dialog box shown in Figure 13-1 appears.

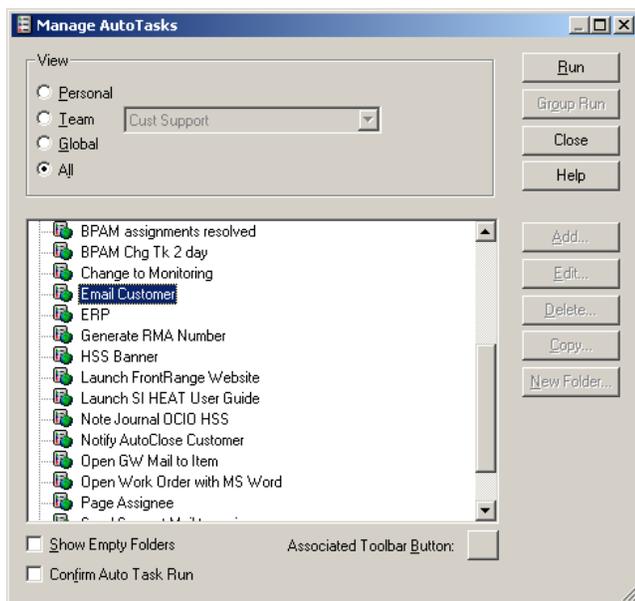


Figure 13-1: Sample of Manage AutoTasks window

2. In the View section, select **All**.
3. Click once to select the AutoTask you want to add to your toolbar.
4. Click **Associated Toolbar Button** in the lower right area of the dialog box.

5. Choose a button of your choice from the dialog box shown in Figure 13-2.

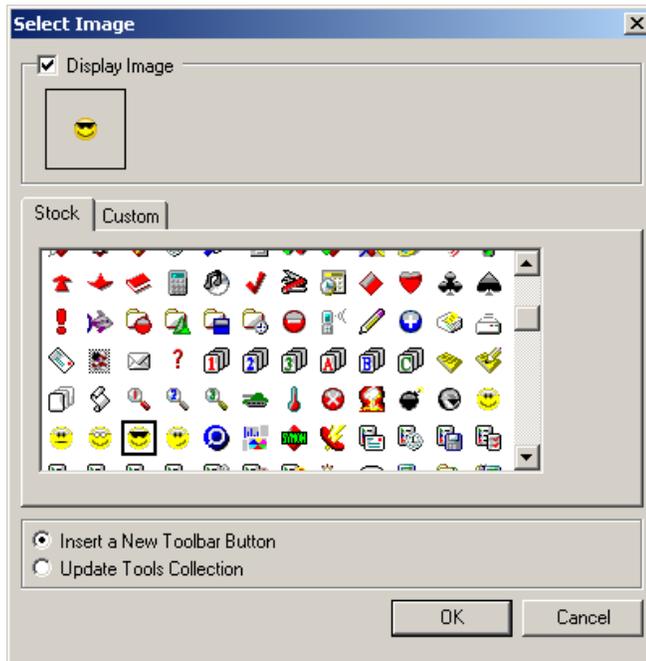


Figure 13-2: Select Image dialog box

6. Click **OK**.

You are returned to the Manage AutoTasks dialog box

7. . Click Close, and the button appears on the right side of your toolbar as shown in Figure 13-3.



Figure 13-3: Sample of toolbar with newly chosen button

12.2 Removing an AutoTask Button from Toolbar

This procedure provides instructions for removing an AutoTask button from your toolbar.

To remove an AutoTask button from the toolbar:

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

13. Appendix C: RPMS Troubleshooting Checklist

Please obtain the following information when receiving an RPMS-related trouble call:

1. Enter the details in the Additional Information field on the RPMS details screen. This information is in addition to the fields on the RPMS Detail Screen.
2. Enter the package name including Menu Option used.
3. Enter the Error Trap Report including Variable List.
4. Include the Screen Capture of the error with private patient info blocked (demographics). Save the file and attach it to the ticket.
5. Note whether the error occurred on a Production System or Test System.
6. Note whether there are any outside contractors working on the system that are not officially contracted with OIT(such as Alternative Third Party Billing and Point of Sale software)?
7. Note whether there are any non RPMS COTs packages being used, interfaced, or tested