Quest® Workspace™ Help Desk

formerly
Help Desk Authority 9.1.2

HDAccess User Manual

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Overview

HDAccess is a self-help solution that gives you an easy online interface to your help desk issues and your help desk organization's knowledge base.

Through a standard internet connection and browser you can:

- Enter new issues
- Monitor the status of your issues
- Perform queries on your issues
- Access the wealth of knowledge available in your provider's knowledge base

To get started, enter the URL of your provider's HDAccess site in your favorite browser.

Browser Requirements

HDAccess:

- Microsoft Internet Explorer 8/9
- Mozilla Firefox 15
- Google Chrome 22
- Apple Safari 5

Logging into HDAccess

When you initially open HDAccess in your web browser, the Requester Login window is displayed:

1. Enter your user name in the **Requester Logon Name** field.
2. Enter your password in the **Password** field.
3. Click the **Submit** button.

> In some cases, the links for **Register** and **Forgot Logon Name and/or Password** will not be visible. The presence of these links is dependent upon the specified settings of the administrator.

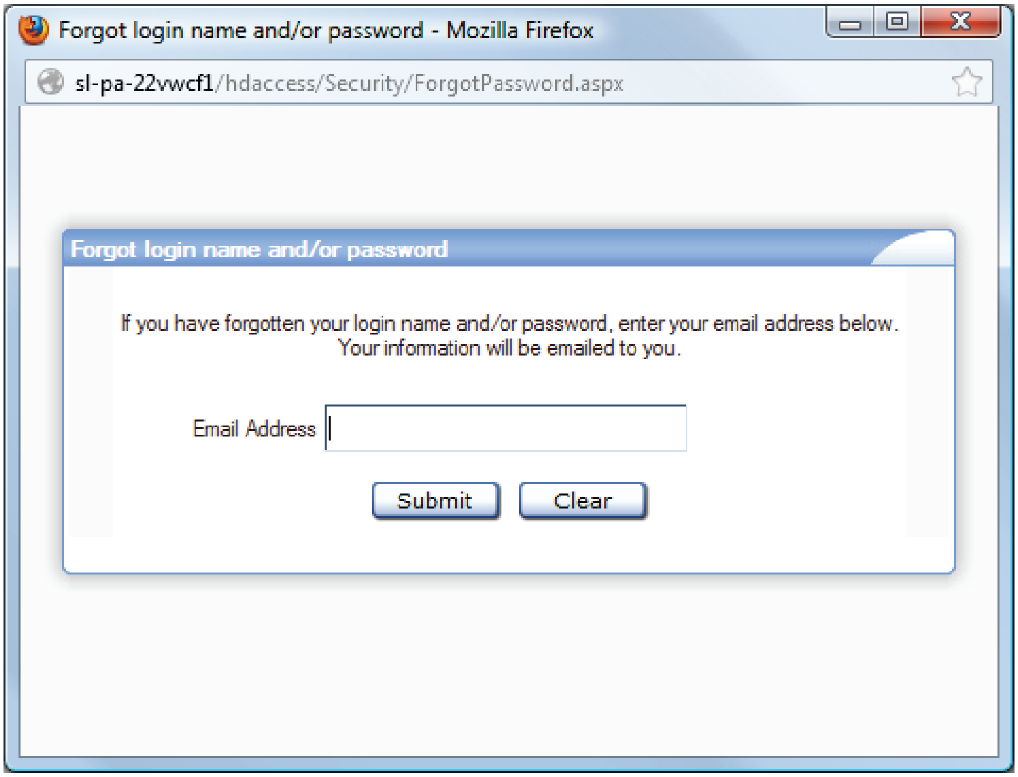
Registering for HDAccess

If you are not yet registered to use HDAccess, click the Register link. This opens the Registration window as shown below.

1. Enter your name in the **Full Name** field. This field is required.
2. Enter the company name in the **Company Name** field.
3. Enter your phone number in the **Phone** field.
4. Enter your email address in the **Email** field. This field is required.
5. Enter a logon name in the **Logon Name** field. This field is required.
6. Enter your password in the **Password** field. This field is required.
7. Re-enter your password in the **Confirm Password** field. This field is required.
8. Click the **Submit** button.

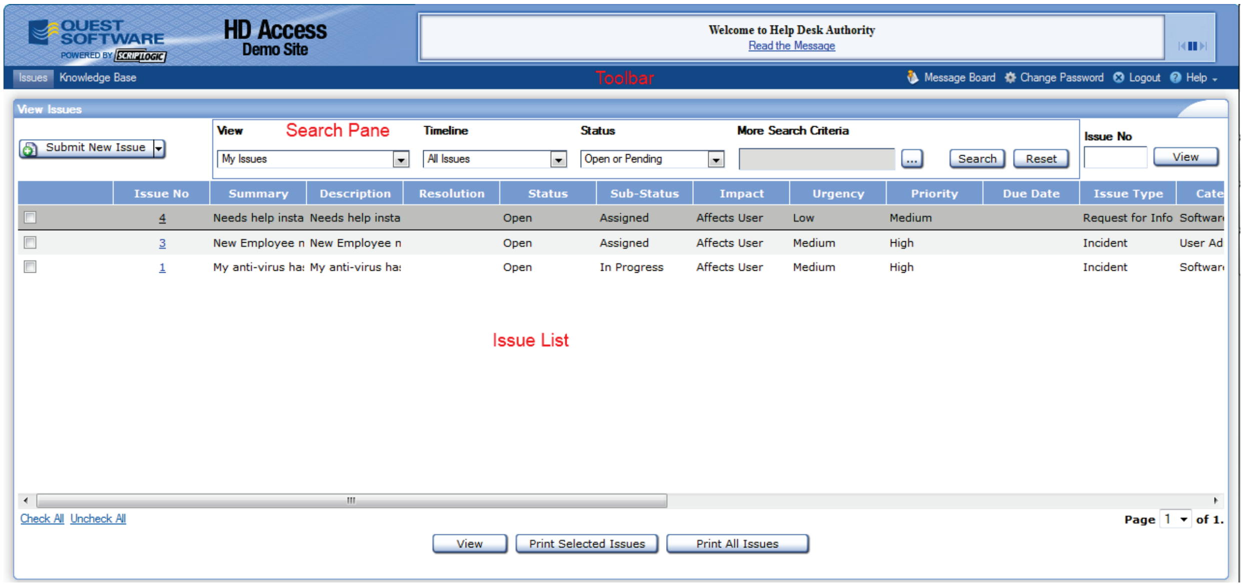
Forgot Logon Name and/or Password

If you have forgotten your logon name or password, click the **Forgot Logon Name and/or Password** link. This will open the Forgot logon name and/or password window as shown below:



1. Enter your email address in the **Email Address** field.
2. Click the **Submit** button. Your information will be sent to the email address you specify.

The HDAccess Workspace

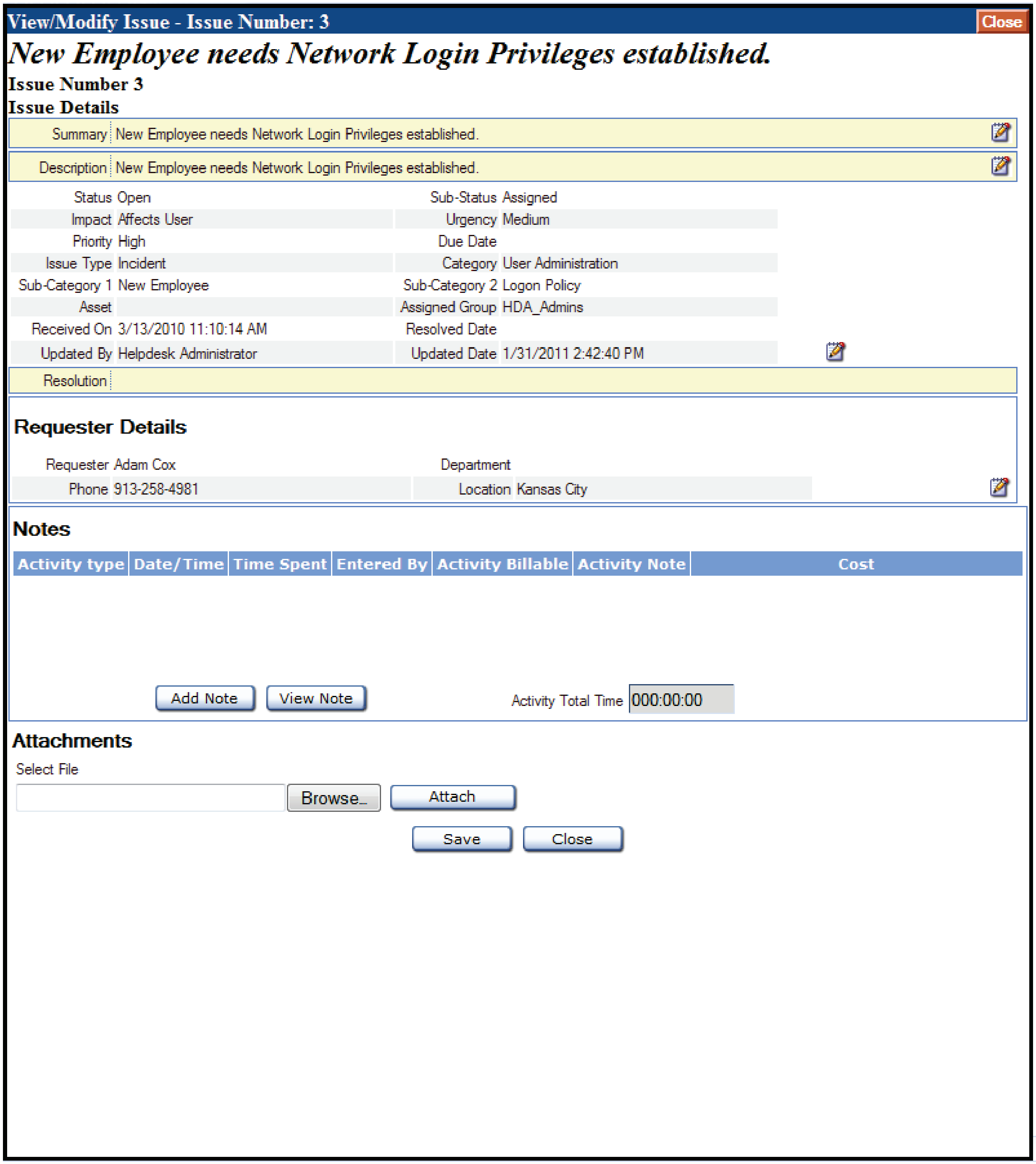


The Toolbar

The Toolbar contains two options, **Issues** and **Knowledge Base**.

The View Issues Window

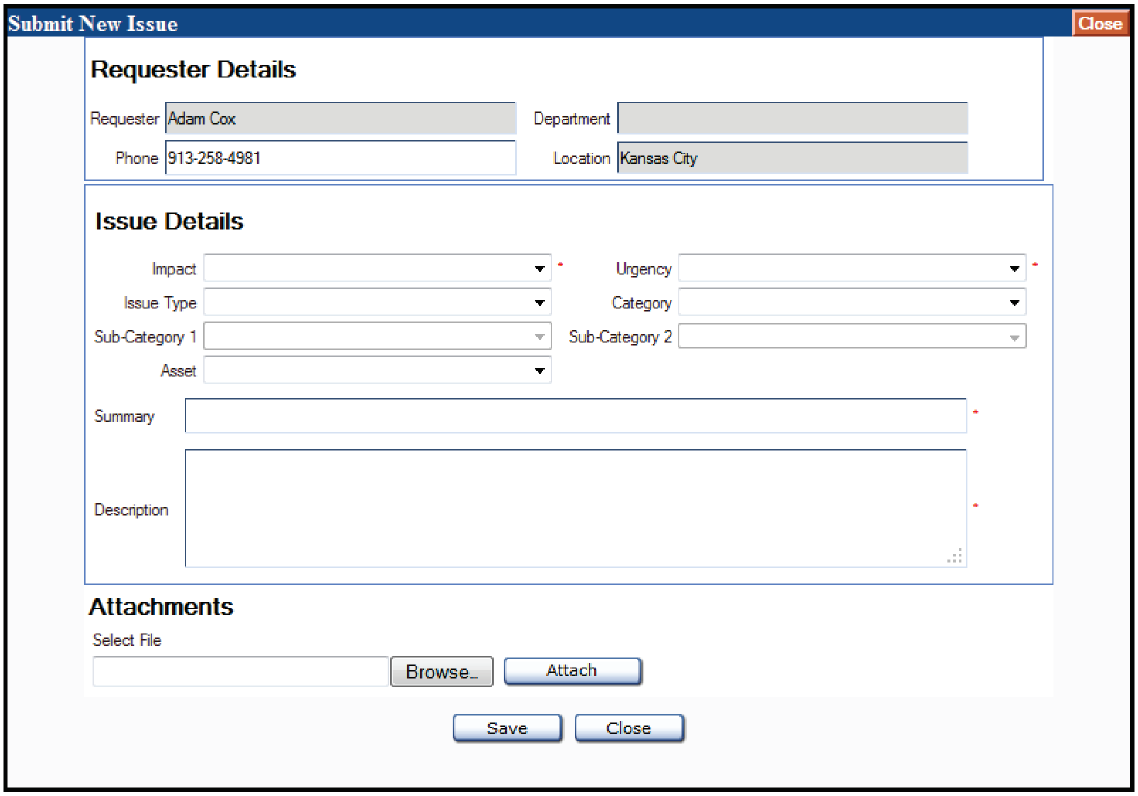
Selecting issues in the Toolbar will open the View Issues window. This is the main work area of HDAccess. If you would like to view or modify an issue, click the issue number of the issue (under the **Issue No** column). This will open the View/Modify Issue window.



Submit New Issue

Click the 

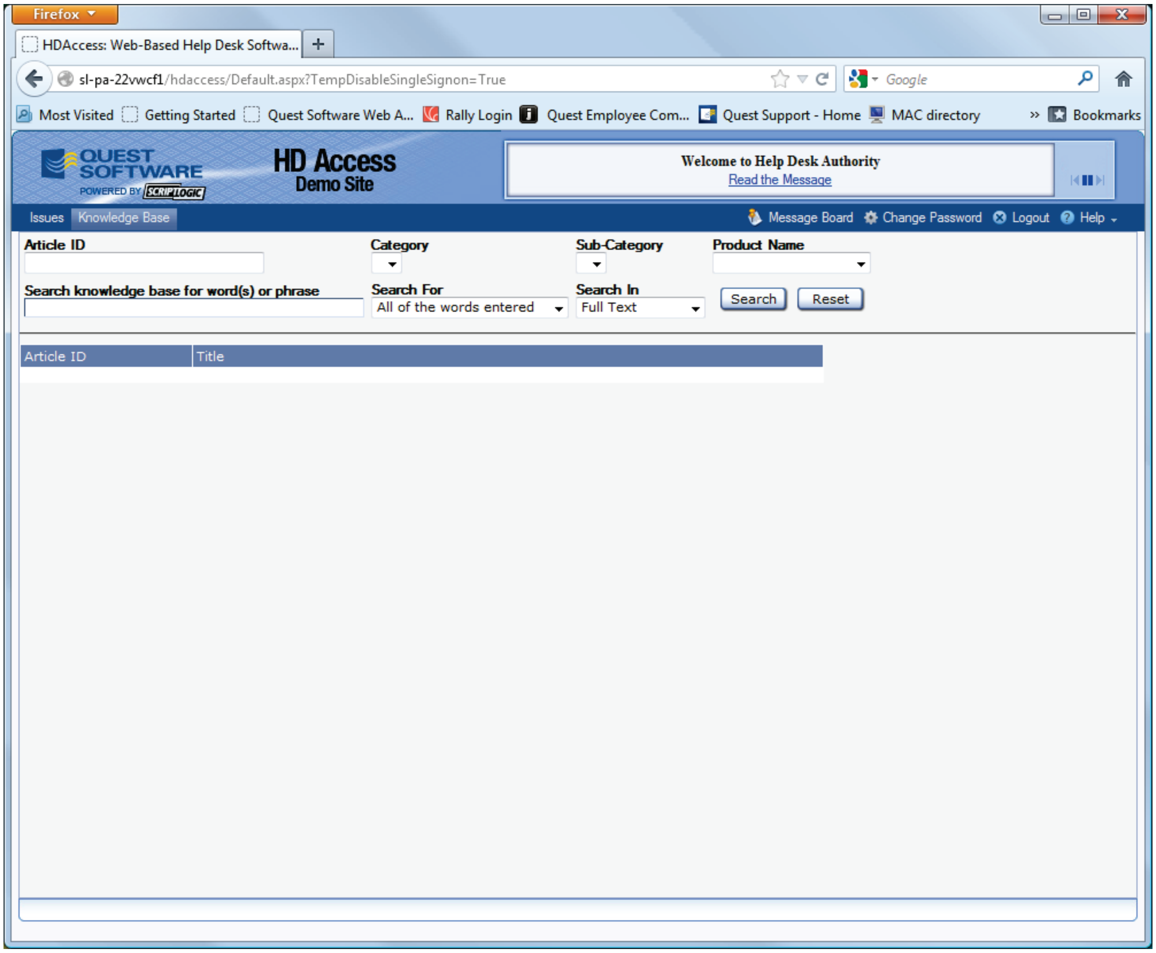
to open the Submit New Issue window.



1. The Requester Details section will be pre-populated with your requester data. The **Phone** field can be edited.
2. In the Issue Details section, use the drop-down menus for **Impact**, **Urgency**, **Issue Type**, **Category**, **Sub-Category 1**, **Sub-Category 2** and **Asset**. The **Summary** and **Description** fields are required. *Note that these fields may vary depending upon the layout that is being used, determined by the administrator.
3. In the **Summary** field, enter any notes or details regarding the issue.
4. In the **Description** field, enter a description of the issue.
5. If the **Notes** field is present, enter any additional notes that are necessary.
6. If you would like to attach a file or files to the new issue, click the **Browse** button in the Attachments section to locate the file you wish to attach, and then click the **Attach File** button to attach the selected file.
7. When your new issue has been completed, click the **Save** button.

The Knowledge Base

Your help desk provider maintains a collection of information including troubleshooting information, documents, articles based on previously resolved issues, and frequently asked questions for sharing within their organization. This knowledge base can be thought of as accumulated wisdom regarding their help desk experience. Each element in the knowledge base is referred to as an article and will have a unique article ID. You can access the knowledge base if the HDAccess administrator allows it and the **Knowledge Base** button in your toolbar is enabled.



Using the Knowledge Base Search window, you can find:

- All articles belonging to a particular category
- All articles belonging to a particular sub-category
- All articles pertaining to a particular product
- All articles that satisfy a combination of these criteria
- A specific article identified by the article ID

To search the knowledge base:

1. Enter the article ID, or select other search criteria from the drop-down menus, or enter keywords or phrases to search on.
2. Click the **Search** button.

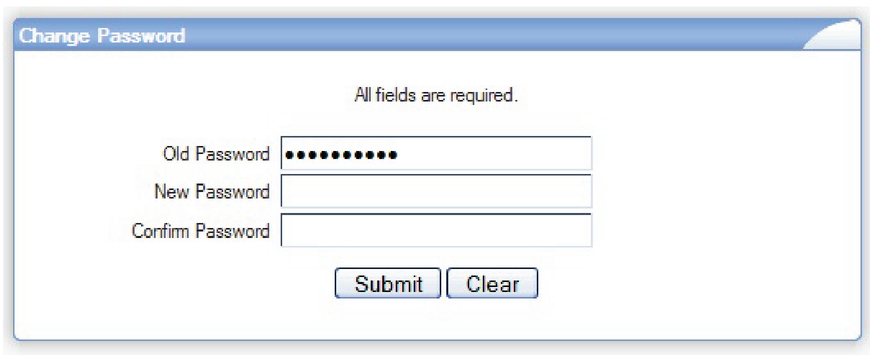
The Message Board

Clicking the Message Board button on the toolbar will open a new window displaying the toolbar messages. See *Message Board* below for more details.

Change Password

Change Password

In HDAccess, a user can change his or her password at any time.

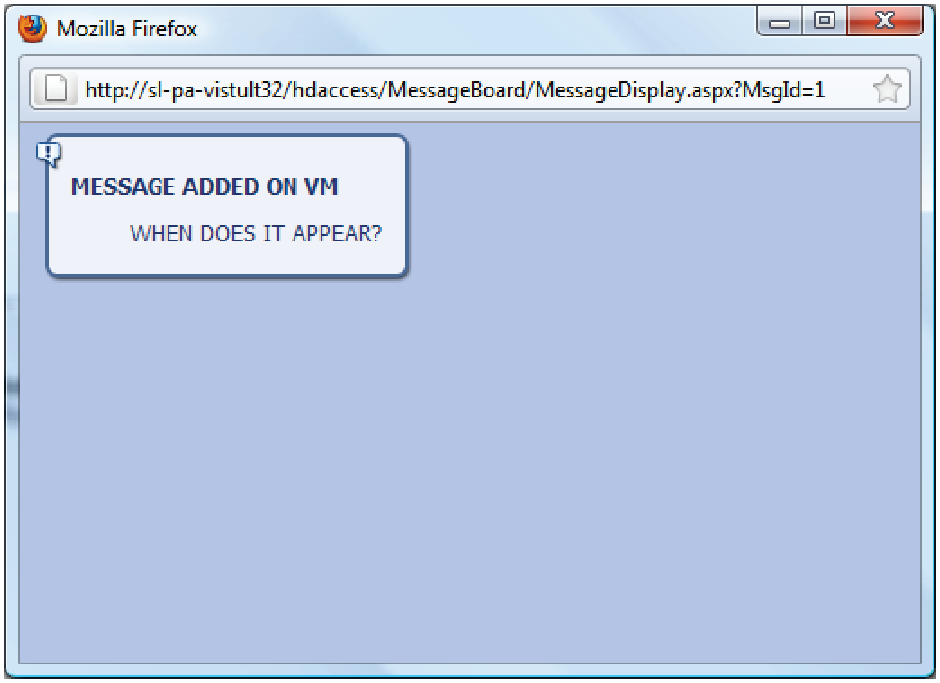


1. Under the **Settings** menu, select **Change Password**. This will open the Change Password pop-up window.
2. Enter your current password in the **Old Password** field.
3. In the **New Password** field, enter a new password.
4. In the **Confirm Password** field, re-enter your new password.
5. Click the **Submit** button.

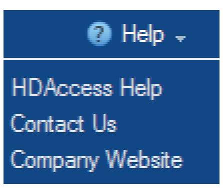
Message Board

The Message Board allows system administrators to broadcast information of interest to all users at the same time. The headline of each message will scroll in the Message Board headline window at the top of the HDAccess window as shown below.

Clicking on the headline will open the Message Board window to display the text of the current headline and message.



The Help Menu

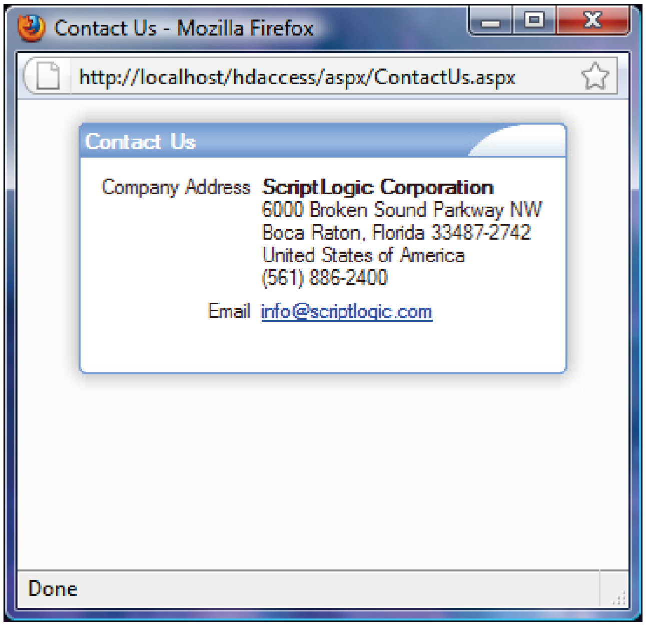


HDAccess Help

Selecting **HDAccess Help** from the Help menu will open the HDAccess User Manual in PDF format (the manual you are currently reading).

Contact Us

Selecting the **Contact Us** option from the Help menu will open the Contact Us window as shown below.



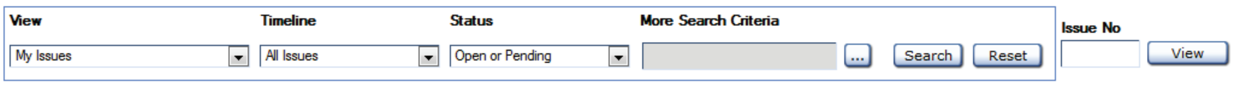
Company Website

Selecting the **Company Website** option will open the company's website in a new browser window.

Viewing Issues

After logging in as a requester, HDAccess will display the View Issues window. From this window, you can search for issues and view them in the issue list. You can also open issues in a View/Modify Issue window where you can edit them, as well as read/add activity notes and add attachments.

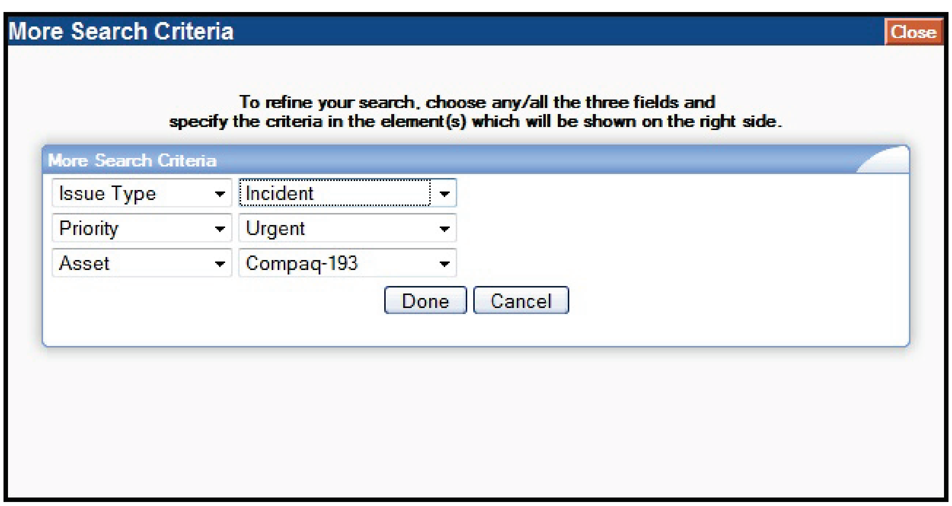
The Search Pane



The Search Pane allows you to search through your Issues to find the ones you are particularly interested in. By using the search field criteria, you are able to pinpoint just the issues you would like to review.

Each field is described in the following table.

Field	Description
View	From this drop-down menu you can select to view the issues you have submitted or all issues reported by your company, department and/or location, (depending on the options that the HDAccess administrator has selected).
Timeline	Select issues from the past 1, 7, 30, 60 or 90 days.
Status	Choose from All, Open, Closed, Pending or Suspended.
Issue No	Enter the Issue number you would like to view.
More Search Criteria	Opens the More Search Criteria window and allows you to further refine your search by specifying up to three additional fields upon which to search. (See screen shot below)



The Results Pane

The Results Pane is a table containing all the issues that match the criteria you specified in the Search Pane. The columns of the table are defined by the layout designed by the administrator. The table is initially sorted by issue number but can be resorted according to the contents any column by clicking on the column name – once to sort ascending, twice to sort descending.

There are several ways to open any issue in a View/Modify Issue window:

- Double click anywhere in the table row the issue is in
- Click the **Issue No** link
- Click the check box in the issue's row and click the **View** button

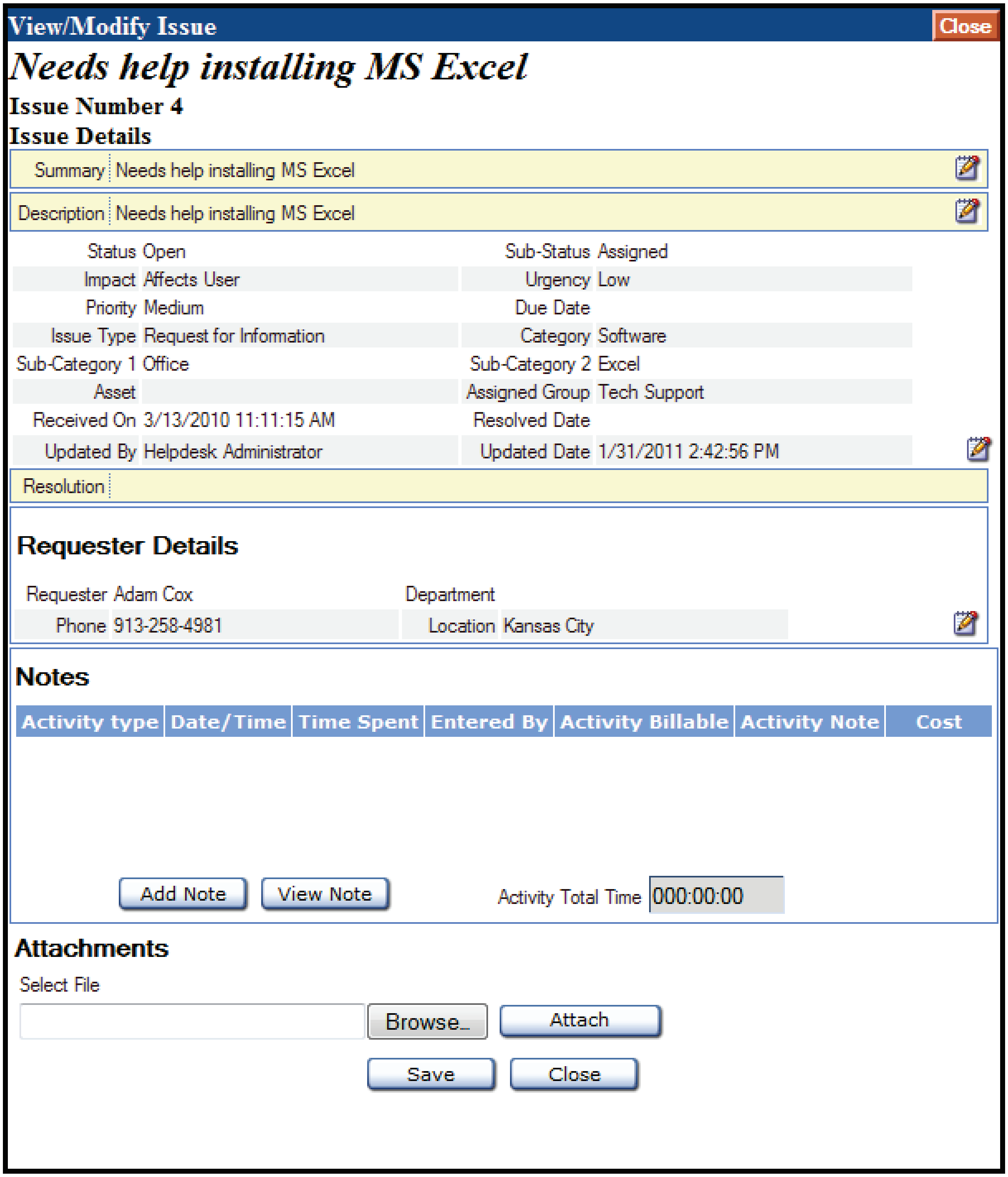
When you have an issue open in the View/Modify window, you can edit the issue if necessary. See the next section of this manual for detailed instructions on editing issues.

If there is more than one page of results, use the forward and backward page buttons, or select the page you want to go to in the **Page of** drop-down menu.

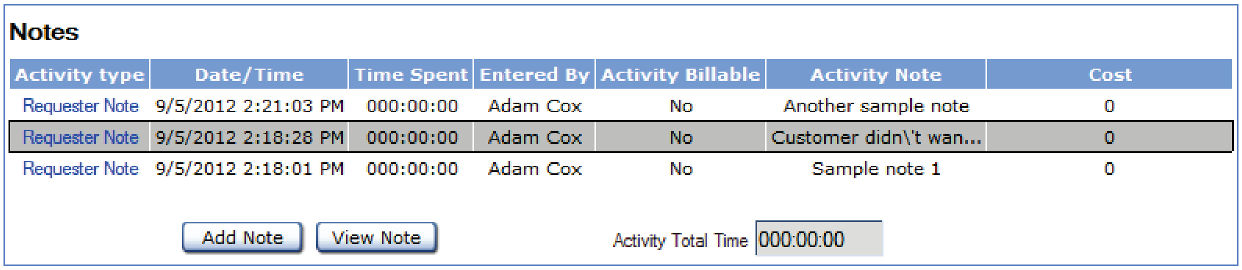
To select an issue to print, check the checkbox next to the issue, then click the **Print Selected Issues** button. You can select more than one issue to print. Clicking the **Print All Issues** button will print all the issues.

Editing Issues

After opening an issue to view (as described in the previous section of this manual), you may have the need to make changes on some of the information in the issue. Your issue will be opened in a View/Modify window as shown below. This is where the changes can be made.

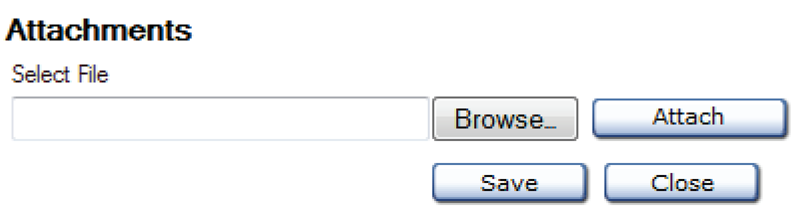


1. To update any field, click the icon. This will open the field for editing.
2. Make the change you require and click the icon to save the change and close the field, or to cancel the change and close the field with the previous value intact.


Notes

Activity type	Date/Time	Time Spent	Entered By	Activity Billable	Activity Note	Cost
Requester Note	9/5/2012 2:21:03 PM	000:00:00	Adam Cox	No	Another sample note	0
Requester Note	9/5/2012 2:18:28 PM	000:00:00	Adam Cox	No	Customer didn\'t wan...	0
Requester Note	9/5/2012 2:18:01 PM	000:00:00	Adam Cox	No	Sample note 1	0

3. In the Notes section, you can view existing notes on the issue, or you can add notes to the issue (with limitations). To view a note, highlight the note in the issue list and click the **View Note** button. This will open a View Note window. The fields cannot be edited in this window. Click the **Close** button when finished viewing the note.
4. To add a new note, click the **Add Note** button. This will open the Add Note window. The issue number will automatically be in the **Issue No** field. In the large text field, enter the text of your note. Click the **OK** button when the note is complete.
5. The **Activity Total Time** is updated from the notes automatically and cannot be edited.



6. In the Attachments section, you can view attachments that have been added to the issue. To view an attachment, simply click on the file name. This will open a new window with the attachment (such as an image), or the application best for viewing the attachment, such as Word or Acrobat.
7. To add an attachment, click the **Browse** button and select the file you wish to attach from the File Upload window. Click the **Open** button to close the File Upload window. Click the **Attach File** button to attach the file to the issue. The attachment will now be included in the File Name list.
8. When you have completed editing the issue, click the **Save** button.