



IT  
**DIRECT**™

ITDirect™  
User Manual  
**Technician**

Version 2.0  
SchoolDude.com, Inc.

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# Technician Guidelines

## I. Welcome to the Home Page! Now What?

*(A quick overview of what's on the Home page.)*

A technician will only see incidents assigned to themselves on their Home page. They will however, be able to search for any incidents via the search or advanced search. A technician will also have limited editing capabilities for an incident, but will be able to add their own labor hours and complete their incidents.

Once you've logged in with your user name and password, you're taken directly to your Home page. It should look something like this, depending on whether or not any incidents have already been assigned to you:

The screenshot displays the IT DIRECT Home page interface. At the top, there's a navigation bar with tabs for Home, New Incident, Calendar, and My Settings. A search bar is located on the left, and a 'SEARCH KNOWLEDGE BASE' button is on the right. The main content area is divided into several sections:

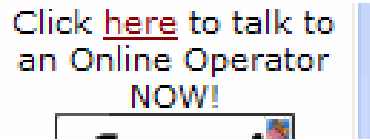
- LOGIN HERE:** A message for Alfred Dude! with a link to click here if not logged in.
- Quick Launch:** Links to User Forum, New Incident, Labor Hours, Purchase Transactions, Inventory Issue, and SchoolDude.com site.
- ASSIGNED INCIDENTS:** A list of incidents assigned to the user. Two incidents are shown:
  - Sloan High School 116:** 'There's an incident'. Incident Age: 4 (in days). Assigned to: Alfred Dude. Contact: Howard Dude. Phone: 919-555-1647. Actions: Print This!, Email Supervisor, Make a Note. Status: Low Action Taken. Options: Yes, mark complete. Today's Labor Hours. Save. Deferred.
  - Sloan High School 101:** 'Stage monitor in sound booth isn't working.' Incident Age: 10 (in days). Assigned to: Alfred Dude. Contact: Tammy Dude. Phone: 919-555-6497. Actions: Print This!, Email Supervisor, Make a Note. Status: Low Action Taken. Options: Yes, mark in progress. Yes, mark complete. Today's Labor Hours. Save. New Request.
- My Work:** A section for 'New Query'.
- INCIDENTS BY STATUS:** A summary of incident counts by status. It includes a 'Period' dropdown (set to All), a 'Work Queue' dropdown (set to --All Work Queues--), and a 'Refresh' button. The 'Incident Totals' show 1 New Request and 1 Deferred. A pie chart titled 'Work In Process' shows a 50/50 split between New Request (green) and Deferred (purple). A legend below the chart identifies the colors: green for New Request and purple for Deferred.

At the bottom, a note states: 'Counts are based on Status Date for each selected period. This reflects the actual date of the last status change.'

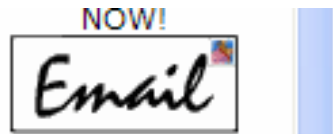
Across the top of the page, there are four tabs reading: “Home”, “New Incident”, “Calendar”, and “My Settings”. Each of these tabs will be discussed in detail further on but for now, let’s take a look at the **Home** page. It contains the following sections:

1. **LOGIN HERE**: If you are logged in, you should see your name here. If you do not see your name, click the word “**here**” to log in correctly.
2. **Quick Launch**: This section provides six commonly used links for technicians in ITDirect. They are: the ITDirect User Forum (a discussion board where you can submit questions and/or problems you encounter while using ITDirect. You can also read questions others have posted.), New Incident, Labor Hours, Purchase Transactions, Inventory Issue, and SchoolDude.com site. We’ll discuss these in detail a little further along in the manual.
3. **INCIDENTS BY STATUS**: The graph that will eventually show in this section shows the number of incidents by status that have been assigned to you. To filter the graph by period or work queue, select the desired period or queue from the drop-down boxes given. If you change any graph options, click the “**Refresh**” button to refresh the graph.
4. **My Work**: This section will show the queries you have entered into the system. You can also add a new query by clicking the **New Query link** in this section.
5. **ASSIGNED INCIDENTS**: This section will show a list of all incidents created by others and assigned to you for completion.
6. **WORK CENTER**: The Work Center provides a link to calendar, as well as a link where you can get today’s weather. If you click the link for **today’s date’s work**, you’ll see the number incidents assigned to you for this particular day.
7. **Information & Analysis**: Clicking on any of these links will allow you to access lists, manage codes, view reports and graphs on the selected information type. We’ll cover this section more in depth in a little later on.
8. **Favorite Web Sites**: You may list the links to your favorite or most-commonly used websites on this page. This list can be personalized for each user.
9. **Help**: Help links are available in the bottom right-hand corner of your **Home** page, as well as at the very bottom of the page, just above our contact information. Clicking on the **Help link** in the top right-hand corner will take you to the ITDirect manual at any time.

If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your **Home** page. To connect directly with someone from SchoolDude Support via online chat, click on the word "here" (underlined and highlighted in red). See below:

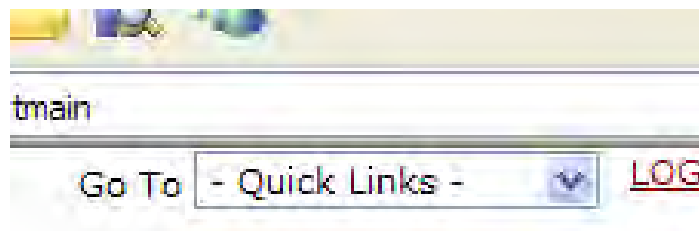


To write and send an email directly to SchoolDude Support, simply click on the **Email icon** directly below the link we just mentioned. The email link looks like this:



A blank email form will pop up, already addressed and ready to use.

10. The **Quick Links** are located at the very top of the page and provide you with a way to navigate quickly between SchoolDude products. In other words, if you would like to move from ITDirect for any reason to another product used by your facility, all you have to do is click on the **Quick Links drop-down box**, choose the SchoolDude product you'd like to visit, and you'll be taken to that product's **Home** page automatically. Quick Links is located at the top of the **Home** page, near the right-hand corner, and looks like this:



**SCHOOLDUDE SAYS:** Macromedia Flash Player (a free download) is required to view graphs in ITDirect.

## II. My Settings: Your Information in a Nutshell.

Before we get started with the nuts and bolts of the incident request process, let's take a minute to check out the **My Settings** page, which contains your information as entered by the Administrator during the account setup process. Use this page to edit your information or to change your password.

Just click on the **My Settings tab** at the top of your page. Your **My Settings** page should look something like this:

ITDirect

Home New Incident Calendar My Settings

Search for:  GO

Advanced Search | Help

SEARCH KNOWLEDGE BASE

Legend: ☒ Indicates required information.  
☒ Account Administrator

### ITDirect Participant Information

Login Name  ☒

First Name  ☒

Last Name  ☒

Email  ☒

☒ Receive email notifications.

Reports To   
(Note: Reports to fields helps supervisors and administrators process and manage incident assignments.)

Phone Number

Fax

Pager

Pager Email ☐ Notify electronically by Pager?  
(Note: Pager notifications for incident requester is not supported. Unit must support text-based electronic notifications. You can test here.)  
  
☐ Notify Pager Email only for Emergency Incidents.

Cellular Phone

Cellular Email ☐ Notify electronically by Cellular Phone?  
(Note: Cellular notifications for incident requester is not supported. Unit must support text-based electronic notifications. You can test here.)  
  
☐ Notify Cellular Email only for Emergency Incidents.

Change Password

Old Password

New Password

Verify New Password

Done

Home New Incident Calendar My Settings

Click here to talk to an Online Operator NOW!

Powered by: SCHOOL DUDE .com

Conditions of Use | Privacy Policy | Security Statement

Email

- Make any changes you wish to make and click **Done**. If you don't want to change your password at this time, you don't have to. Your changes will be made anyway.
- When you click **Done**, you will be taken back to your **Home** page. Your changes have been made.



**SCHOOLDUDE SAYS:** If you don't see the change immediately, for instance, if you changed the spelling of your name and the spelling hasn't changed under the Login Here section, don't worry. Next time you log in, you'll see that the change has been made.

### III. Entering/Editing Incidents: ITDirect in Action.

As a Technician, you will only see incidents routed to you in the **INCIDENTS BY STATUS** and **ASSIGNED INCIDENTS** section of the Home page. You also have the ability to create incidents of your own.

To understand what is involved with creating your own incidents, as well as how to edit the incidents that are routed to you, we'll take a look at the incident form itself and the fields it contains. To see the form, click the **New Incident tab** at the top of your Home page. The page you're taken to will look like this:

The screenshot shows the 'New Incident Request' form in the ITDirect system. The form is divided into several steps, each with specific fields to be completed. The top navigation bar includes links for Home, New Incident, Calendar, and My Settings. A search bar is located on the left, and a 'SEARCH KNOWLEDGE BASE' button is on the right. The form itself is titled 'New Incident Request' and includes a sub-header 'To submit your request complete the following form.'.

**Step 1 Location** ☒ Indicates required information.

**Location** ☒    
**Building**    
**Area Number**    
**Asset Inventory**

**Step 2 Select Problem Type:** ☒ **Technology Help Desk:**  
Click here for Technology Emergency Contacts  
Click on the problem type below that best describes your issue.  
   
**Technology Emergency**  
☐ Check here if this is an emergency or call any of the emergency contacts below.  

Contact Name	Contact Phone
No contacts listed.	

**Step 3 Please describe your problem or request.** ☒

**Step 4 Requested Completion Date**

**Step 5 Questionnaire**  
No Questionnaire for selected Problem Type

**Step 6 Please provide contact information for follow-up questions and notifications.**  
**Requested By** ☒  
   
(Select "OTHER" if requester not in list and type their name in field below.)  

<b>First Name</b> <input checked="" type="checkbox"/> <input type="text" value="Alfred"/>	<b>Last Name</b> <input checked="" type="checkbox"/> <input type="text" value="Dude"/>	<b>Email</b> <input checked="" type="checkbox"/> <input type="text" value="adude@geewiz.com"/>
<b>Phone</b> <input type="text" value="919-555-5555"/>	<b>Pager</b> <input type="text"/>	<b>Cellular Phone</b> <input type="text"/>

**Step 7 Action Taken**  
  
Action taken communicates your action reason to those involved with this work request. It is optional.

**Step 8 Attachment**  
Attach New File (Maximum allowed is two attachments with a size of 3MB or less per file.)

**Step 9 Will you perform this work?**  
☐ Yes ☒ No

**Step 10**

To get started making a new incident request of your own, follow the steps below, keeping in mind that ☒ indicates a required field:

**Step 1:** ☒ Select your **Location**, **Building**, **Area** and **Asset Inventory** from the drop-down boxes provided. If available, include the **Area Number**.

**Step 2:** ☒ Select the **Problem Type** from the given drop-down box. Problem types are a way to categorize incidents. Also indicate if this is a **Technology Emergency** by clicking the check-box provided.

**Step 3:** ☒ **Describe the problem** or incident request in the box provided.

**Step 4:** Choose the **Requested Completion Date** for this incident by entering it in the field provided or selecting it from the calendar by clicking on the small **calendar icon** given here.

**Step 5:** **Questionnaires** are lists of questions created by the account administrator that they want requesters to be able to say “yes” or “no” to in order to better understand the kind of problem they’re having when they submit an incident request. You can answer the questionnaire questions here or skip this step if there are none given for the problem type you selected.

**Step 6:** ☒ Please give your requester **Contact Information** here by selecting your name or the requester’s name from the drop-down box provided. Once the name is selected, the remaining contact information will automatically fill in below. If the name isn’t in the drop-down box, select “Other” and fill in the name, email, and contact numbers in the spaces given.

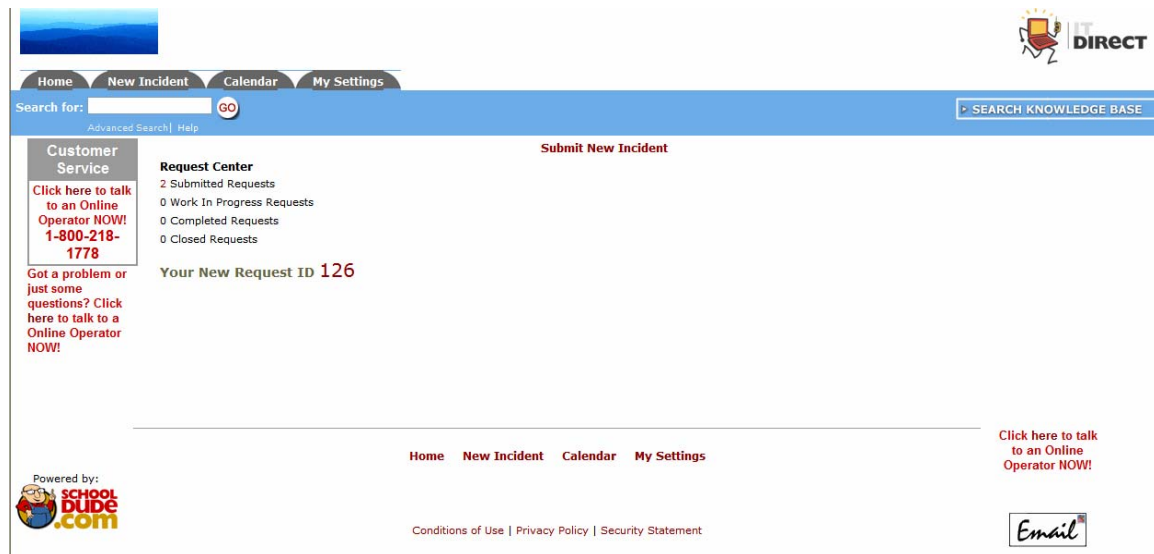
**Step 7:** **Action Taken:** this is where you can enter in any action that you know has been taken to correct a particular incident.

**Step 8:** If you have any **attachments**, you can include them here.

**Step 9:** If you will be performing the work for this incident, click the **button** next to the word “**Yes**”. If not, click the “**No**” **button**.

**Step 10:** Once you’re finished entering all the information you want to include for this incident, click the **Submit button** at the bottom.

Once you click Submit, you'll be taken to the following page, which will show the Request ID number for your new request.




On this page, you'll also see the Request Center. This will show you the number of submitted requests, work in progress requests, completed requests, and closed requests that you've made.

If you go back to your **Home** page, you'll see that now your new incident is showing in the "Incidents By Status" section and the "Assigned Incidents" section (if it was assigned to you for completion), along with a pie graph.

In this section of your **Home** page, you'll see all incidents assigned to you, listed by their status. You can sort them using the **Period and Work Queue drop-down boxes** at the top or you can click on a **number** next to a status to see a list of all the incidents with that particular status.

See the screen shot of the **Home** page on the next page.



[Home](#)
[New Incident](#)
[Calendar](#)
[My Settings](#)




Search for:


[Advanced Search](#) | [Help](#)




**LOGIN HERE**  
Hello Alfred Dude!  
If you are not Alfred Dude please click [here](#).


**Quick Launch**  
[User Forum](#)  
[New Incident](#)  
[Labor Hours](#)  
[Purchase Transactions](#)  
[Inventory Issue](#)  
[SchoolDude.com site](#)




**ASSIGNED INCIDENTS**  
Note:  
Action Taken is saved when Mark In Progress button or Mark Complete button is clicked.  
Meter Reading is saved when Mark In Progress button or Mark Complete button is clicked.  
Sort by:  Status ☒ Ascending ☐ Descending  
1 - 3 of total 3 listed


**Sloan High School**  
**116** There's an incident  
    
Incident Age: 4 (in days)  
Assigned to: Alfred Dude  
Contact: [Howard Dude](#)  
Phone: 919-555-1647, Pager:

 Low  
**Action Taken**  
  
☐ Yes, mark complete.  
Today's Labor Hours   
  
Deferred

**Sloan High School**  
Area: Auditorium  
**101** Stage monitor in sound booth isn't working.  
    
Incident Age: 10 (in days)  
Assigned to: Alfred Dude  
Contact: [Tammy Dude](#)  
Phone: 919-555-6497, Pager:

 Low  
**Action Taken**  
  
☐ Yes, mark in progress.  
☐ Yes, mark complete.  
Today's Labor Hours   
  
New Request

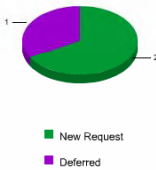
**Sloan Elementary School**  
Area: 2nd Floor  
**126** CD Drive won't open.  
    
Incident Age: 0 (in days)  
Assigned to: Alfred Dude  
Contact: [Alfred Dude](#)  
Phone: 919-555-5555, Pager:

 Medium  
**Action Taken**  
  
☐ Yes, mark in progress.  
☐ Yes, mark complete.  
Today's Labor Hours   
  
New Request

1 - 3 of total 3 listed

**My Work**  
[New Query](#)


**INCIDENTS BY STATUS**  
Period:  All  
Work Queue:  --All Work Queues--  
  
Incident Totals  
☒ 2 New Request  
☒ 1 Deferred  



Counts are based on Status Date for each selected period. This reflects the actual date of the last status change.

[Home](#)
[New Incident](#)
[Calendar](#)
[My Settings](#)

Click here to talk to an Online Operator NOW!



## IV. Viewing and Executing Incident Requests: Get the Wheels Turning.

As a Technician in ITDirect, your main responsibility is the processing of incident requests assigned to you. You'll take a look at each request as it comes in and then carry it out. Don't worry—it's a simple process!

The easiest and most straightforward way to see and handle your new assigned incident requests is through the "Assigned Incidents" section at the top of your Home page.

The screenshot shows the ITDirect interface with the 'Assigned Incidents' section. The top navigation bar includes 'Home', 'New Incident', 'Calendar', and 'My Settings'. A search bar is on the left, and a 'SEARCH KNOWLEDGE BASE' button is on the right. The 'ASSIGNED INCIDENTS' section has a note about saving actions and a 'Sort by' dropdown set to 'Status'. It shows 1 - 3 of total 3 listed incidents. The incidents are:

- Sloan High School 116**: There's an incident. Incident Age: 4 (in days). Assigned to: Alfred Dude. Contact: Howard Dude. Phone: 919-555-1647, Pager: [blank]. Action Taken: Low. Buttons: Print This!, Email Supervisor, Make a Note. Status: [dropdown]. Options: Yes, mark complete. Today's Labor Hours: [input]. Save button. Deferred button.
- Sloan High School 101**: Area: Auditorium. Incident Age: 10 (in days). Assigned to: Alfred Dude. Contact: Tammy Dude. Phone: 919-555-6497, Pager: [blank]. Action Taken: Low. Buttons: Print This!, Email Supervisor, Make a Note. Status: [dropdown]. Options: Yes, mark in progress. Yes, mark complete. Today's Labor Hours: [input]. Save button. New Request button.
- Sloan Elementary School 126**: Area: 2nd floor. Incident Age: 0 (in days). Assigned to: Alfred Dude. Contact: Alfred Dude. Phone: 919-555-5555, Pager: [blank]. Action Taken: Medium. Buttons: Print This!, Email Supervisor, Make a Note. Status: [dropdown]. Options: Yes, mark in progress. Yes, mark complete. Today's Labor Hours: [input]. Save button. New Request button.

The right sidebar contains 'WORK CENTER' with a calendar, 'TOTAL ASSIGNED WORK' (3), and 'Information & Analysis' with links to Favorite Web Sites, Asset Inventories, Incidents, Queries, and Saved Actions.

- To approve or decline an incident request without ever leaving the Home page, simply scroll down the list of requests in the Assigned Incidents section and address one at a time. Describe any actions being taken in the **Action Taken** box provided and click the **Approve** or **Declined** button provided. See below:

This close-up shows the 'Action Taken' box for an incident. It includes a status dropdown (Low), checkboxes for 'Yes, mark complete.', 'Yes, mark in progress.', and 'Yes, mark complete.'. There is a 'Today's Labor Hours' input field, a 'Save' button, and a 'Deferred' button.

- To process a request listed in the Assigned Incidents section from that request's incident form, click on that request's **IT incident ID number**, shown in red near the top left-hand corner of each request. Continue with the following steps.
- After clicking on the IT incident ID number, you will be taken to the full form for that incident, which contains all information given about what needs work, where, and when.
- Start by selecting the **status** of this incident, based on what you're going to do with it. If you click on the **Status drop-down box**, you can make your selection from the list that will appear.
- You can then scroll down and make any changes you wish to make or update any information you'd like to include. Required fields are marked with a ☒. Be sure to include action taken and any notes or messages that would be helpful.
- Click the **Submit, Approve, or Reject button** at the very bottom.
- Once you click one of these buttons, the page will refresh and the words "Incident is Saved" will appear in red at the top of the page.

## V. **My Work**: Entering and Using Queries in ITDirect.

Queries are a way to customize a search on incidents and create custom list reports. These lists can be viewed from the **Home** page in the “My Work” section, or they may be printed in PDF or Excel form. You give the criteria (the fields to search for) and select the output fields you want and then run the query. You can save them as you go for repeated use.

- Get started by clicking the **Queries link** in the Information & Analysis section of your **Home** page.
- You’ll be taken to the **My Queries** page, which looks like this:

The screenshot shows the 'My Queries' page in ITDirect. The page has a blue header with navigation tabs: Home, New Incident, Calendar, and My Settings. Below the header is a search bar with a 'GO' button and a 'SEARCH KN' button. The main content area is titled 'Query Shortcuts' and contains three buttons: 'New Query', 'Query Permission', and 'My Queries'. Below these is a 'Legend' section with a note: 'Click [icon] to sort table by that column.' followed by a 'Filtering' section with a row of letters A-Z and 'All'. The 'My Queries' section shows '1 - 0 of total 0 listed' and a table with columns 'Query Name' and 'Where Clause'. There are 'Add New Query' links in the top right and bottom left of the table. At the bottom of the page, there is a footer with 'Powered by: schoolbude.com', 'Conditions of Use | Privacy Policy | Security Statement', and a 'Click h to an Opera' link.

- This is where all your queries will be listed once you add them. To add a new query, click the **Add New Query link** in the top and bottom corners of this list.

- You'll be taken to the following page:

Home New Incident Calendar My Settings

Search for:

Query Shortcuts

[New Query](#) [Query Permission](#) [My Queries](#)

New Query

Query Name

Available Columns  Operand

Where Clause

Asset: \*TODAY\* can be added where today's date is inserted when the query is executed.  
e.g. [Date Created] = \*TODAY\*

Output Fields

Field Name	Order	Row	Show ?
Action Taken	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Actual Comp. Date	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Actual Cost	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Actual Hours	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Area	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Area Number	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Asset	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Asset Item No.	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Asset Tag No.	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Assigned to	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Budget Code	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Building	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Classification	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>
Confirm in x Hours	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="checkbox"/>

- Enter your **Query Name**.
- Enter your filter options by selecting **Available Columns**, **Operand**, and **Value** from the drop-down boxes.
- If you'd like to view the values available for that field, click the **Show Values** button. You can use the **"AND"** and **"OR"** buttons to link more items to the "where" clause. The default is set to "AND".
- Click the **Insert button** to enter your Where Clause.
- Select the **output fields** you'd like to use. Click the **box** under "Show?" if you want the field to display on your query. You can select the order and row that it will display on by choosing from the drop-down boxes.
- Click **Save Query** or **Run Query** at the bottom of the page, depending on what you'd like to do.
- To print the query result in a PDF file, click the **"Print This"** icon near the bottom of the page. To print the query to an Excel spreadsheet, click the **"Print to Excel" button**.

**Query Name:** DHS Query  
**Where Clause** [Location Desc] = 'Darlene High School' AND [Priority] = 'Medium'  
 1 - 2 of total 2 listed

Previous 10 Next 10

Incident ID	Incident Desc	Incident Date	Assigned to	Priority
111	My printer is not working.	1/13/2005 11:19:00 AM		Medium
113	My printer is not working!	1/14/2005 3:43:00 PM		Medium

Previous 10 Next 10

Print This!

Print to Excel

Powered by:
 

[Home](#)
[Calendar](#)
[New Incident](#)
[Problem Types](#)
[Reports](#)
[Services](#)
[Account Setup](#)

[Click here to go Online](#)

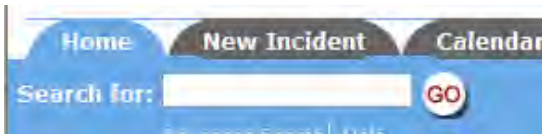
## VI. Searching For Incidents: Get The Information You Want When You Want It.

So you've learned how to create, process, and approve new incidents. The next step is to learn how to search for incidents that have been entered into the system. That way, you can find exactly what you need, when you need it.

To get started, let's take a look at the different types of searches that you can perform within ITDirect and then check them out, one at a time:

1. Search
2. Advanced Search

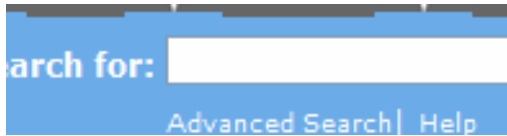
**1. Search:** This is the simplest search that you can perform. You can search for incidents using the search text box, located in the light blue bar near the top, left-hand side of every page. See below:



In this box, you can enter an incident number or a keyword and click **Go** to search for the incident or information you need.

For example, if you wanted to find incident number 105, you would simply type "105" into the "Search for" box and click **Go**. That would then pull up the form for that particular incident. If there is more than one incident which references incident number 105, you would then see a listing of all matching incidents.

2. **Advanced Search:** Underneath the search field discussed above, you will see a link that says “Advanced Search”:



Clicking on this link will take you to the **Advanced Search-Incident** page, which looks like this:

A screenshot of the 'Advanced Search - Incident' page. The page has a blue header with navigation links: 'Home', 'New Incident', 'Calendar', and 'My Settings'. Below the header is a search bar with a 'GO' button and a 'SEARCH KNOWLEDGE BASE' button. The main content area is titled 'Advanced Search Shortcuts' and includes tabs for 'Incident Search', 'Asset Search', 'Transaction Search', and 'Knowledge Base Search'. Below these are several filter sections: 'Location' (Sloan Elementary School), 'Assets' (MELEX1-), 'Status' (New Request, Work In Progress, Complete, Closed Incident, Declined, Parts on Order, Duplicate Request, Void), 'Assigned To' (Unassigned, Administrator, School, Dude, Alfred, Dude, Ben, Dude, Emily, Dude, George, Dude, Henry, Dude, Howard, Dude, Jill), 'Budget' (IT Budget Annual budget for IT departme, Library Fund Any monies allotted or dona), 'Area' (Blank, 1st Floor, 2nd Floor, 3rd Floor, Athletic Field, Auditorium, Band Room, Baseball Field (High), Baseball Field (Middle)), 'Problem Type' (Blank, Alarm Bell, Antenna Work, Audio / Visual, Blackboard, CD Drive, Closed Circuit TV Systems, Data Repair, Email), 'Priority' (Blank, Emergency, Low, Medium, High, Scheduled, Safety), 'Project' (Blank, Playground Refurbishment), 'Purpose' (Blank, Upgrade), 'Requested By' (Blank, Administrator, School, Dude, Alfred, Dude, Ben, Dude, Bob, Dude, Emily, Dude, Erin, Dude, Fred, Dude, George), 'Custom Category' (Blank), 'Building' (Blank), 'Incident ID' (input field), 'Incident Date' (date range selector), 'Incident Receipt Confirmed?' (radio buttons for Yes/No), 'WorkOrder ID' (input field), 'Requested Completion Date' (date range selector), 'Description' (input field), and 'Target Start Date' (input field).

On this page, you may choose any combination of search options from the listings and fields provided. Enter your options and click the **Search Now button** at the very bottom of the page.



**SCHOOLDUDE SAYS:** You can also click the **Save and Search Now button** once you've entered all the desired search criteria. What this does is save this particular advanced search so that it will be available for repeated use in the future. Once you save an advanced search, you can go back to it by using the **Saved Incident Searches drop-down box** at the top of the Advanced Search-Incident page OR by clicking the **Saved Actions link** in the Information & Analysis section of your Home page!

- To print out the results list, click on the **Print This icon** at the bottom of the results page. To print out a single incident, click on the **printer icon** (🖨) next to the corresponding incident.
- To view a specific incident, click on the **incident ID number** or on the description.

If you would like to send an email to the requester, click on the **requester name** to send an email via your email system (your browser and email must be configured to use “mail to” links).



**SCHOOLDUDE SAYS:** Narrow your Advanced Search criteria by choosing one of the shortcuts near the top of the screen, based on what information you're looking for: Incident Search, Asset Search, Transaction Search, or Knowledge Base Search:

**Advanced Search Shortcuts**

🔍 **Incident Search** 🔍 **Asset Search** 🔍 **Transaction Search** 🔍 **Knowledge Base Search**

**Filtering**

Saved Incident Searches: -- Select a Saved Incident Search -- ▾

**Advanced Search - Incident**

**Location** -- Include All Locations -- **Assets** -- Include All Assets -- **Status** -- Include All Status -- ▴

## VII. The Calendar: See the Big Picture.

If you'll take a look at the "Work Center" section of your Home page, you'll see that the first red link underneath it is the **calendar**. Click on this link to be taken to the following page:

The screenshot shows the Incident Calendar interface. At the top, there are navigation tabs: Home, New Incident, Calendar, and My Settings. Below these is a search bar with a "GO" button and a "SEARCH KNOWLEDGE BASE" button. The main section is titled "Calendar Shortcuts" and includes links for Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather. Below these links, there are dropdown menus for "Select Month/Year" (set to August 2007) and "Assigned To" (set to Dude, Alfred). There are also checkboxes for "Work Queue" (Include All Work Queues), "Show all outstanding work", and "Show completed/closed work". A "Print Assignments" button is also present. The main calendar grid shows the days of the month, with incident counts in parentheses next to some dates. For example, August 7 has 101 incidents, August 13 has 116, August 17 has 126, and August 24 has 126. The calendar is titled "Incident Calendar for August 2007". At the bottom, there are links for "Home", "New Incident", "Calendar", and "My Settings". A "Powered by: SCHOOL DUDE .com" logo is in the bottom left, and a "Click here to talk to an Online Operator NOW!" button is in the bottom right. An "Email" button is also visible.

Home New Incident Calendar My Settings

Search for:  GO SEARCH KNOWLEDGE BASE

Calendar Shortcuts

Month View Day View Organization Event Calendar Assignment Report Get Weather

Select Month/Year  
August 2007

Print Assignments

Assigned To  
Dude, Alfred

Work Queue  
-- Include All Work Queues --

Show all outstanding work  
Show completed/closed work

Refresh Calendar

Incident Calendar for August 2007

Tip: You can click on the day number to see more details on incident assignments. The number in parenthesis are hour estimates. Only open incidents appear, closed, completed, declined, void, duplicate and forwarded are excluded.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
5	6	7 101	8	9	10	11
12	13 116	14	15	16	17 Work Day 126 Get Weather	18 Work Day
19	20	21	22	23	24	25
26	27	28	29	30	31	

< Previous Month Next Month >

Home New Incident Calendar My Settings

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Email

At the top of your screen, just above the words "Incident Calendar for...", are the Calendar Shortcuts: Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather. In this section, we'll cover each of these shortcuts in turn, starting with the Month View.

The **Month View** page shows you what's going on, on a large, easy-to-read calendar, one month at a time. It's the view that shows automatically when you open up the Calendar page—in other words, the page you're looking at now.

The month you're in currently will display with arrows in the bottom left and right-hand corners that you can click on to navigate to the **Previous Month** or **Next Month**. Just below the **Calendar Shortcuts**, on the left-hand side, you will see two drop-down boxes, one for the month and the other for the year, which serve as another kind of shortcut, allowing you to navigate the large calendar from one month to the next without clicking multiple times on the Previous Month and Next Month buttons.

On the **Month View**, each day shows in the traditional squares of a calendar, which contain any open incidents (or actually, their ID numbers). Open incidents are those not in the “Complete”, “Closed”, “Void”, or “Duplicate” status.

Incident numbers will be displayed on the calendar as red links and appear on the day of that incident's Target Start Date. If you click on an incident's **ID number**, it will take you to the form for that incident.

You can also choose which incidents you'd like to see using the drop-down boxes near the upper right-hand corner of the calendar. Select the “**assigned to**” user, the **work queue**, and what kind of **work** you'd like to see displayed (outstanding or completed/closed). Then hit the **Refresh Calendar** button.

The Day View page can be reached in two ways:

- Clicking on the **Day View shortcut** at the top of the page, or
- Clicking on the **number of the date** on the monthly calendar.

The Day View shortcut automatically defaults to today's date. It shows you what's going on, one day at a time. You will see who the incident was assigned to (if applicable), the Work Queue, the Incident ID number, the Incident Description, the Location Name, and the Estimated Hours (if applicable).

- You can navigate from one day to the next using the small calendar on the right-hand side of the screen. Simply click the **number** of the day you wish to view. To move from one month to another, use the **left and right arrows** next to the name of the month at the top of the small calendar (see below).



- To print a form for an incident, click on the **“Print This” button** for the corresponding incident.

The **Organization Event Calendar** page is where you can view events, such as school breaks, for locations/organizations within your school or district. They are stored on a yearly calendar on the left-hand side of the screen and then listed in more detail on the right-hand side.

You can reach the Organization Event Calendar by clicking on the **shortcut** at the top of the Calendar page.

The Organization Event Calendar page should look something like this:

**Organization Event Calendar**

Location: -- Select Location --

2007 Sloan County Schools Organization Event Calendar

All locations

1 - 7 of total 7 listed

Begin Date	End Date	Event Title	Date Created
10/10/2005	10/14/2005	Fall Break	8/18/2005 9:05:27 AM
11/15/2005	11/15/2005	Matt's Birthday	9/8/2005 10:19:01 AM
11/28/2005	11/28/2005	Teacher Work Day (November)	11/16/2005
12/19/2005	1/6/2006	Christmas Break	9/6/2005 2:33:56 PM
3/28/2006	3/28/2006	Test Event 2	9/6/2005 2:50:43 PM
4/17/2006	4/21/2006	Spring Break	9/6/2005 2:35:47 PM
8/17/2007	8/18/2007	Work Day	8/9/2007

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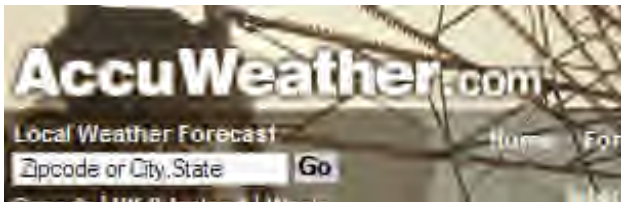
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**Assignment Report:** By clicking on the [Assignment Report shortcut](#), you can view and print a report of all incidents and their assignments, the location, description, hours, date of completion, and costs. The report will pop up in a separate box as an Adobe Acrobat document.

Incident Assignments					Sloan County Schools	
Assigned To					Estimates	
Incident ID	Location	Area	Requester Name	Requester Email	Hours	Costs
Start Date	Description	Area #			Date of Completion	
Problem Type						
105 8/9/2007	Sloan Middle School Printer in class 302 not working.	3rd Floor	Phil Dude pdude@geewiz.com		0	.00
120 8/14/2007	East Sloan High School Something broke. Fix it.	Auditorium	Jill Dude jilldude@geewiz.com		0	.00
102 8/9/2007	Sloan High School Sound system not working.		Bob Dude bdude@geewiz.com		0	.00
107 8/13/2007	East Sloan High School Broken printer in classrooms 307 and 311.	3rd Floor	Howard Dude HDude@geewiz.com		0	.00
108 8/13/2007	South Sloan High School Sound system not working correctly.	Band Room	Howard Dude HDude@geewiz.com		0	.00
109 8/13/2007	East Sloan High School Sound system upgrade.	Auditorium	Howard Dude HDude@geewiz.com		0	.00
114 8/13/2007	Sloan Community College Incident 2.		Howard Dude HDude@geewiz.com		0	.00
115 8/13/2007	Sloan High School There's an incident		Howard Dude HDude@geewiz.com		0	.00
117 8/14/2007	East Sloan High School Incident example	1st Floor	Jill Dude jilldude@geewiz.com			

The **Get Weather** shortcut, as with the weather icon on the main monthly calendar and the **Home** page, serves as a link to connect you with **AccuWeather.com**, where you can check current weather conditions in your area or the area where work orders are being done. You can also check the forecast with a range up to fifteen days.

- Simply click on the **Get Weather shortcut** near the top of the page and a separate browser page will pop up, displaying AccuWeather.com.



- Enter your **Zip Code** or **City/State** into the box shown above and click **Go**.