Peregrine

ServiceCenter
Work Management

Release 5.1

Peregrine
SYSTEMS

Contents

Introducing Work Management

The Work Management guide was designed to give the ServiceCenter administrator, manager or user an introduction to and overview of Work Management, and to get them started in its use.

The Work Management guide has been divided into the following chapters:

- *Scheduling* on page 143 explains Work Management scheduling, including how to schedule, reschedule, lock, and unallocate Incident tickets, Change requests, Request quotes, and their associated tasks as well as explaining autoschedule functionality.
- *Creating Custom Configurations* on page 173 discusses the various customization options and procedures for tailoring your Work Management environment to fit your specific business needs.
- *Function Reference* on page 197 provides a quick overview of various key functions or processes used during the standard implementation of Work Management and ServiceCenter.
- *Microsoft Outlook Integration* on page 211 explains how to load appointments for all operators belonging to a manager from the Microsoft Outlook calendar into the Work Management Schedule window.

Examples

The sample windows and the examples included in this guide are for illustration only, and may differ from those at your site.

Contacting Customer Support

For more information and help with this new release or with ServiceCenter in general, contact Peregrine Systems' Customer Support.

Peregrine's CenterPoint Web Site

You can also find information about version compatibility, hardware and software requirements, and other configuration issues at Peregrine's CenterPoint web site: *http://support.peregrine.com*

1 Log in with your login ID and password.
2 Select **Go** for **CenterPoint**.
3 Select **ServiceCenter** from **My Products** at the top of the page for configuration and compatibility information.

   Note: For information about local support offices, select **Whom Do I Call?** from **Contents** on the left side of the page to display the **Peregrine Worldwide Contact Information**.

Corporate Headquarters

Address:	Peregrine Systems, Inc.
	Attn: Customer Support
	3611 Valley Centre Drive
	San Diego, CA 92130
Telephone:	+(1) (858) 794-7428
Fax:	+(1) (858) 480-3928

North America and South America

Telephone:	(1) (800) 960-9998 (US and Canada only, toll free)
	+(1) (858) 794-7428 (Mexico, Central America, and South America)
Fax:	+(1) (858) 480-3928
E-mail:	support@peregrine.com

Europe, Asia/Pacific, Africa

For information about local offices, see *Peregrine's CenterPoint Web Site*. You can also contact *Corporate Headquarters*.

Contacting Education Services

Training services are available for the full spectrum of Peregrine Products including ServiceCenter.

Current details of our training services are available through the following main contacts or at:

http://www.peregrine.com/education

Address:	Peregrine Systems, Inc.
	Attn: Education Services
	3611 Valley Centre Drive
	San Diego, CA 92130
Telephone:	+1 (858) 794-5009
Fax:	+1 (858) 480-3928

1 CHAPTER

Installing Work Management

This chapter describes the Work Management installation and configuration process for a ServiceCenter administrator or implementer.

Read this chapter for information about:

- *Installation Procedure* on page 14
- *Configuration* on page 14
- *Troubleshooting* on page 16

Installation Procedure

The ServiceCenter installation may include some updated shared files from Microsoft. The screens will inform you as these files are copied. You may be prompted to restart Windows at the end of the installation.

To install Work Management:

▶ Follow the instructions in the *Client/Server Installation Guide for Windows,* for installing ServiceCenter, using the instructions for a custom installation.

1 When the **Select Components** dialog box appears, select **Work Management**.

2 Do not clear any other checked components or you will uninstall them.

3 Continue following the directions in the *Client/Server Installation Guide for Windows* until the Custom installation is complete.

Configuration

If there has been a previous installation of Work Management on this computer, it may be necessary to configure the ODBC driver so that it points to the correct ServiceCenter P4 database.

On Windows NT or 2000 systems, the default path is: Start\Settings\Control Panel\Data Sources(ODBC). Select **WorkMgmt32** and click **Configure**. Point the driver to the same P4 database as the SC express client, by filling in the **Server.Port** field.

To change the server port:

1 Open the ODBC Data Source Administrator.

    a Click the Windows Start button.

    b Select Settings > Control Panel.

    c Double-click Data Sources (ODBC).

2 Double click WorkMgmt32. The Wishbone-P4 ODBC Data Source Setup dialog box will appear.
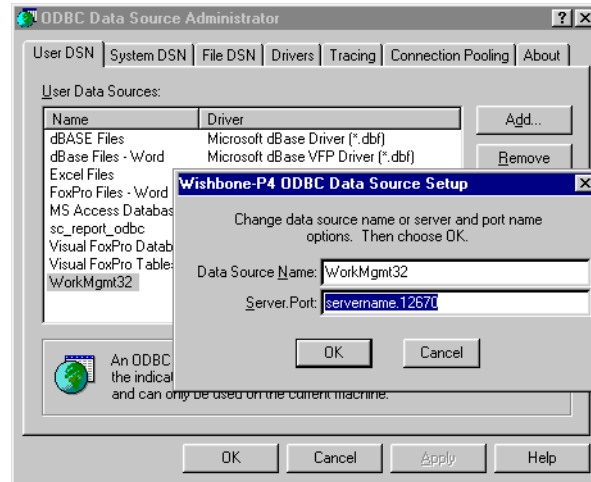
Figure 1-1: Setting the ODBC Data Source

3 Enter the correct server port in the Server.Port text box.

   a Right-click the ServiceCenter Client Icon on the desktop. This should be a client that points to the server you wish to use, (most likely the one you just installed.)

   b Select Properties from the menu that appears.

   c Select the Shortcut tab.
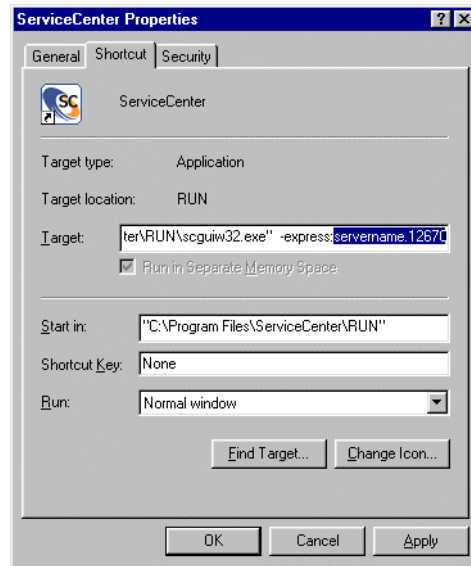
Figure 1-2: Copying the Server and Port

    d Copy the server and port from the Target text box, and paste it into the Server.Port text box.

4 Reboot the computer.

Troubleshooting

If you are having problems getting Work Management to work properly, you can use the trace function to try to detect the error.

To get a trace file:

1 Open WorkMgmt32.ini in the Windows or the Winnt directory.

2 On the third line, change Trace= 0 to Trace = 1. Save and exit.

3 Now run Work Management till the error occurs. The file wmtrace.out is created at the path specified in the Path= WorkMgmt32.ini parameter. By default, this is C:\)

4 Open WorkMgmt32.ini in the Windows or the Winnt directory.

5 On the third line, change Trace= 1 to Trace = 0. Save and exit.

6 Open wmtrace.out in Notepad. Examine the end of it for a a clue as to where the problem has occurred.

7 Search for "error" in the file.

Note: Send the trace file wmtrace.out to customer support.

2 Getting Started

CHAPTER

This chapter is an overview of Work Management to the ServiceCenter administrator, manager or user. It provides an introduction to the Work Management application, and information about using Work Management and the component Help system.

Read this chapter for information about:

Introduction

Work Management manages a Help Desk system through comprehensive scheduling, tracking, and reporting functions. It is designed for organizations seeking to improve organizational productivity by decreasing downtime, improving operator utilization, and enhancing Help Desk efficiency.

A central issue for Help Desks becomes scheduling — assigning Incidents tickets, Change requests, Request quotes, and their associated tasks to the right Operator to be performed in the right sequence. Sequencing the Incidents tickets, Change requests, Request quotes, and their associated tasks ultimately determines how long contacts are kept waiting, as well as the overall organizational downtime.

One example is a Help Desk department with eight support analysts, who are resolving computer hardware and software incidents for 1000 users. At any given time, there are hundreds of Incidents tickets, Change requests, Request quotes, and their associated tasks reported by users waiting in the queue to be resolved.

The automatic scheduler in Work Management schedules Incidents tickets, Change requests, Request quotes, and their associated tasks in the most efficient sequence possible so that organizational downtime is minimized. Work Management makes assignments to the support Operators according to their expertise and availability.

Once the Operator is allocated an Incident, Change, Request, or Task, you can periodically report the status of the item, so at any given time the current status of the Incident, Change, Request, or Task is maintained. Access to the history of how different types of Incidents tickets, Change requests, Request quotes, and their associated tasks were resolved in the past and the history of the contact is also provided to help the Operators address incidents.

Work Management is built on a relational database using ODBC. Reporting capabilities are built into the system with a set of pre-defined reports that measure Help Desk performance, volume, tracking, and so on. You can create any number of Custom reports using Crystal Reports and attach them to Work Management. In addition, importing data into the system or exporting out to an external system is completely open.

Work Management and the Help Desk

The initial function of a Help Desk is to record a request for technical assistance (Incident, Change, Request, or Task). Help Desk personnel may enter this information during a call or they may enter it later from a message left by the contact.

Most organizations strive to resolve the Incident quickly and remotely, using front-line support, possibly with guidance from the many incident resolution knowledge bases available in the marketplace. Work Management users can for instance, utilize the ServiceCenter Knowledge Base resources.

If the incident requires follow-up or a visit to the contact, Work Management refers to this as an Incident. An Incident needs to be scheduled in order to close the call. The Incident should be properly identified and classified so the appropriate technical staff can respond.

The Help Desk environment is constantly changing as new Incident tickets come in and older Incident tickets remain scheduled and are yet to be completed. Since all Incident tickets are not equal in terms of urgency and priority, the current state of the Help Desk must be constantly managed based on a variety of criteria.

As the Help Desk and technical support team resolve contact Incidents, metrics on such issues as call volume and response time are being maintained and made accessible for analysis and decision support.

Work Management provides two modules for supporting the functions specified above:

- Work Management shows the current state of the Help Desk in both graphical and table-based presentations. The Help Desk manager can coordinate outstanding Incidents by assigning them to technicians. This function is accomplished manually using a drag and drop interface, or it is done automatically by the system.

- The automatic scheduling of Incident tickets, and some of the manually assigned Incident tickets, abide by certain rules established by the manager. Issues such as priority, required expertise, responsiveness, existing scheduled Incident tickets, and workload distribution goals can all be modeled to provide optimum results when scheduling. The Operators to whom the Incident tickets are assigned are immediately notified, and they can view any changes made to their existing schedule.

Accessing Work Management

To start Work Management the ODBC driver needs to be pointed at the appropriate ServiceCenter P4 database. You may need to configure the ODBC driver so that it points to the correct ServiceCenter P4 database. For more information, see *Configuration* on page 14.

Important: The ServiceCenter Server must be running before Work Management is started. The ServiceCenter Client must be started before ServiceCenter data, such as Incident tickets can be accessed.

There are three ways to start Work Management:

- *Opening Work Management from the Windows Start Menu* on page 22.
- *Opening Work Management from a Desktop Shortcut* on page 22.
- *Opening Work Management from within ServiceCenter* on page 23.

Opening Work Management from the Windows Start Menu

To open Work Management from the Windows Start menu:

▶ From the Windows Start menu, select **Programs** > **Peregrine ServiceCenter** > **Work Management**.

Opening Work Management from a Desktop Shortcut

In order to open Work Management from the desktop, you will first need to create a desktop shortcut.

To create a shortcut:

1 Right-click your mouse on the desktop.

2 Select **New** from the menu which appears.

3 Select **Shortcut** from the side menu.

4 At the **Create Shortcut** dialog provide the path to the Work Management executable file on your computer, or use the **Browse** button to navigate to the location. The default path is:

C:\Program Files\ServiceCenter\WorkMan\System\WDManager32.exe

5 Select WDManager32.exe and click **Open**.

6 Click **Next** to continue.

7 Create a name for the shortcut, such as Work Management.

8 Click Finish to create the shortcut and place it onto the desktop.

To open Work Management from the Windows desktop :

▶ Double-click the Work Management shortcut.

Opening Work Management from within ServiceCenter

A Work Management button is located on the ServiceCenter administrator main menu.

To open Work Management from within Service Center:

1 Click the Work Management button on the Main Menu.

Figure 2-1: System Administrator Main Menu

Logging In to Work Management

There are several ways to log in to Work Management:

Logging in as an Operator

To log in as an operator:

1 From the Windows Start menu, select **Programs** > **Peregrine ServiceCenter** > **Work Management.** Figure 2-2 shows the Login window.
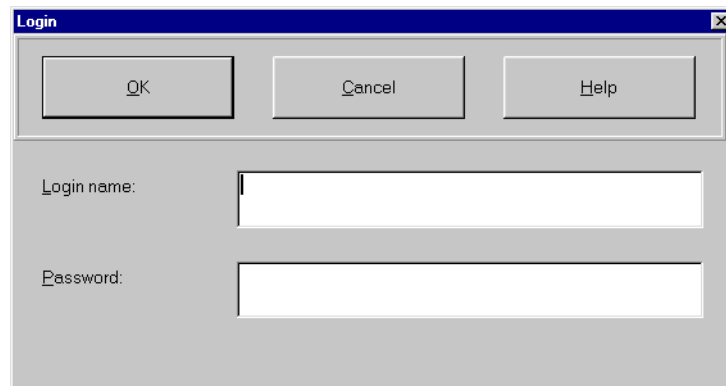
Figure 2-2: Work Management Login Window

2 Enter your login name and password, both should be the same as those used for ServiceCenter.

3 Click **OK**.

Work Management opens and the Incidents tickets, Change requests, Request quotes, and their associated tasks that have been scheduled to you appear in the Schedule window.
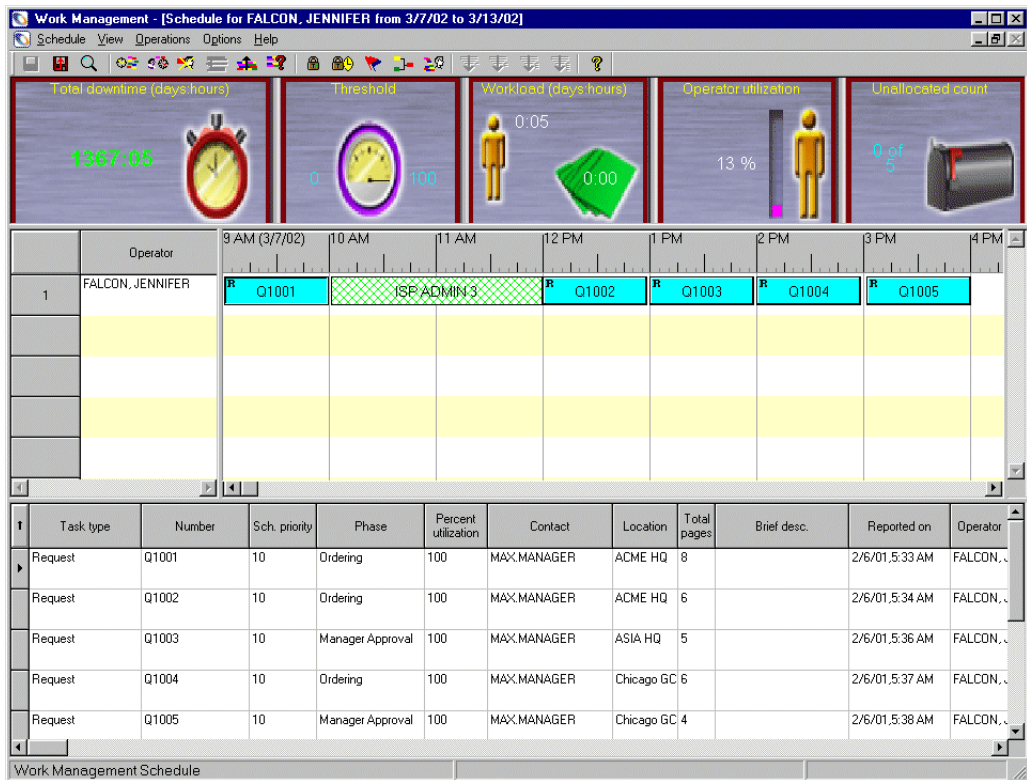
Figure 2-3: Work Management Schedule Window

Logging in as a Shared Operator

Shared operators have more than one manager assigning tasks to them.

To log in as a shared operator:

1   From the Windows Start menu, select **Programs** > **Peregrine ServiceCenter** > **Work Management**. Figure 2-2 on page 24 shows the Login window.

2   Enter your login name and password, both should be the same as those used for ServiceCenter.

3   Click **OK**.

Work Management opens and the Manager List dialog opens. The list of schedules you are able to view is based on the list of managers to which you are assigned and with whom you are shared.
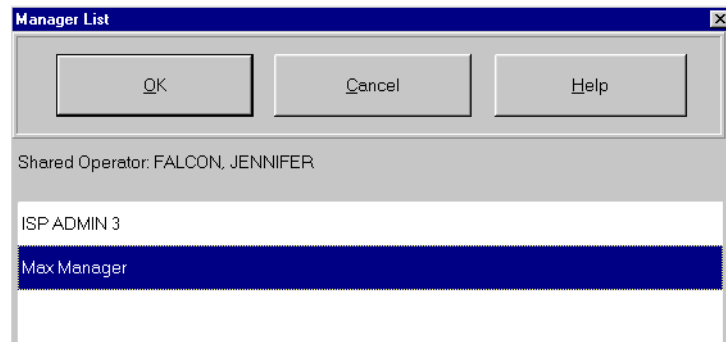
Figure 2-4: Work **Management Manager List Dialog for Shared Operators**

4 Highlight the manager's schedule upon which you wish to work and click **OK**.

When logging in as an operator, the schedule for only that operator is displayed.

5 You can also double-click a manager's name in the Manager List, to open the schedule assigned to you.

Logging in as a Manager

Managers schedule tasks for operators and shared operators. Managers are not able to view or edit the schedules of other managers.

To log in as a Manager:

1 From the Windows Start menu, select **Programs** > **Peregrine ServiceCenter** > **Work Management**. Figure 2-2 on page 24 shows the Login window.

2 Enter your login name and password, both should be the same as those used for ServiceCenter.

3 Click **OK**. Work Management opens, and the schedule defined for your set of assigned operators, Incidents tickets, Change requests, Request quotes, and their associated tasks is displayed.

> **Note:** The login names for all users must be defined in the ServiceCenter *operator* file before-hand. You do not have the ability to change the password associated with your login name from Work Management.
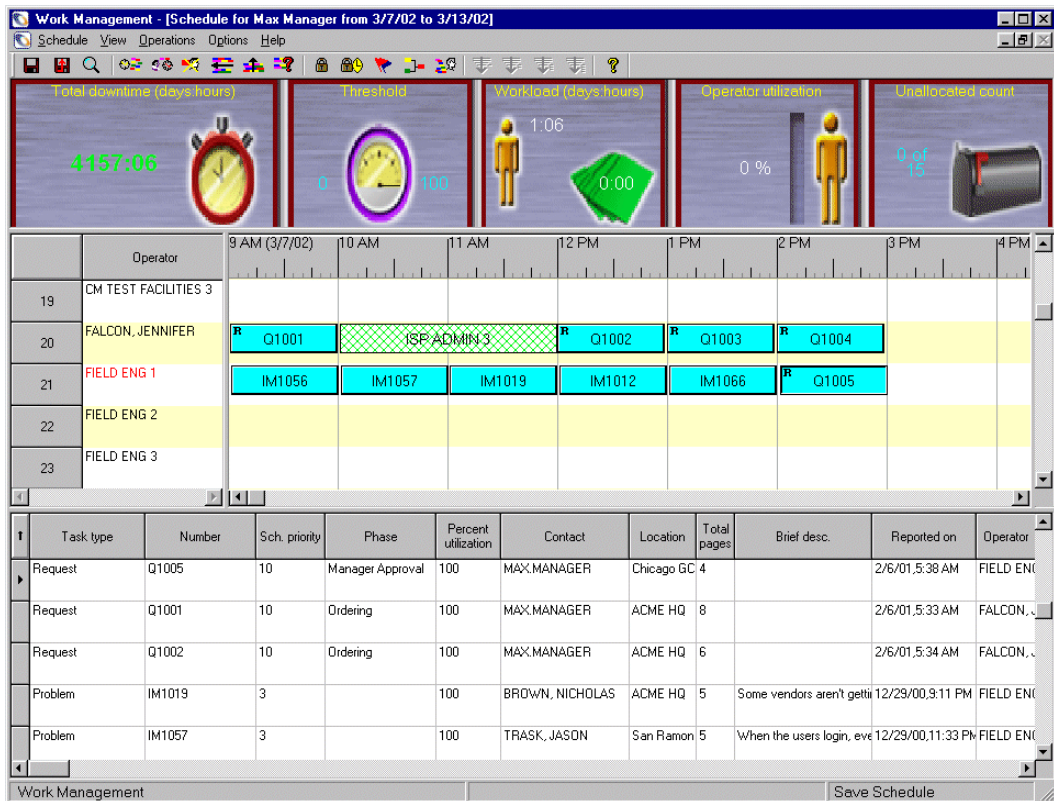
Figure 2-5: Schedule Window with Incidents, Changes, Requests, and Tasks

Logging in as a Group Manager

Group managers view and edit the schedule of at least one manager.

To login as a group manager:

1 From the Windows Start menu, select **Programs** > **Peregrine ServiceCenter** > **Work Management**. Figure 2-2 on page 24 shows the Login window.

2 Enter your login name and password, both should be the same as those used for ServiceCenter.

3 Click **OK**.

Work Management opens and The Manager List dialog opens. The list of schedules you are able to view is based on the list of managers assigned to you. For more information, see *Defining Managers* on page 100.

4 To open a schedule in Work Management, select the manager whose schedule you wish to view.

5 Do one of the following:

- Click **OK** on the **Manager List** dialog to open Work Management.
- Double-click a manager's name in the **Manager List** dialog to open that manager's schedule.

Manager List			
	OK	Cancel	Help

Group Manager: Joseph Work Management

FALCON

Max Manager
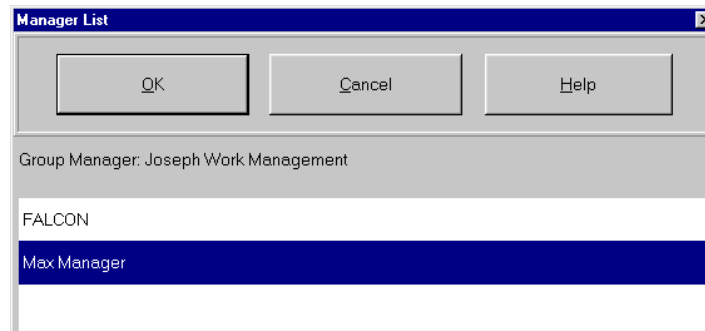
Figure 2-6: Work Management Manager List for Group Managers

6 If you wish to shift the view from one manager's schedule to another, you must exit and login again. Then select a different manager from the **Manager List** dialog box.

Logging in to Microsoft Outlook

If your Work Management user name and MS Outlook profile name are the same, you are automatically logged in to MS Outlook when you login to Work Management. This allows all scheduled obligations from your MS Outlook calendar to be displayed in Work Management, and prevents the scheduling of any Incidents, Changes, Requests, or Tasks during times when you have defined previous obligations. For more information, see *Microsoft Outlook Integration* on page 211.

If your Work Management user name and MS Outlook profile name are different, Work Management may display this message at login: The profile name is not valid. Enter a valid profile name.

To select a profile name:

1 Click **OK.**

The system displays the MS Outlook **Choose Profile** dialog with User profiles.

2 Select your profile name from the list.

3 Click **OK**.

4 Click **Cancel** if you do not want MS Outlook appointments and events to display in your Schedule window.

Exiting Work Management

To log out of Work Management:

1 Pull down the **Schedule** menu.

2 Do one of the following:

- Select the **Exit** option.

- Exit a session by pressing **Alt-F4**.

- Double-click the ServiceCenter icon in the top left corner of the Work Management Home screen, and select the **Close** option from the menu which appears.

If you have made any changes to the schedule and have not saved them, you will be prompted to save the changes prior to exiting Work Management.

The Work Management Desktop

Work Management manages a changing body of outstanding Incidents, Changes, and their Tasks and other issues using five key metrics. Each of these metrics is displayed in a gauge on the main menu screen.

Work Management makes assignments of Incidents tickets, Change requests, Request quotes, and their associated tasks to operators in a way that balances and blends one or more of these metrics to achieve organizational goals.

By default, the system minimizes the total downtime to contacts and optimizes the operator utilization, while keeping track of the other metrics. The manager can then assess the impact of alternative assignments on the four metrics. These rules of responsiveness can be captured and finely tuned to achieve the highest efficiency and result.

The Schedule Window

The main window displayed by Work Management is called the Schedule window.

The main function of the Schedule window is to enable you to:

- View the current status of your Help Desk.
- Schedule your Incidents tickets, Change requests, Request quotes, and their associated tasks.
- Analyze the performance of your Help Desk.

Work Management shows the status of the Help Desk in terms of these specific performance metric: *Total Downtime/Response Time*, *Threshold/Satisfaction*, *Operator Utilization*, *Workload*, and *Unallocated Incidents*. The gauges displaying these metrics are updated in real-time and change as modifications are made to the schedule.

Total Downtime and *Threshold/Satisfaction* are customer-oriented. They indicate customer satisfaction.

Operator Utilization, *Workload*, and *Unallocated Incidents* are organization oriented. They indicate the workload level and efficiency of operator utilization.

At the top of the Schedule window, below the menu bar, are five performance gauges. These gauges track the total downtime or response time of the current schedule (as specified using the **Customize...** option from the **Options** menu), the customer satisfaction, the workload, the operator utilization rate, and the number of unscheduled Incidents tickets, Change requests, Request quotes, and their associated tasks waiting in the system. For more information, see *The Performance Gauges* on page 32.

Below the performance gauges is the *Schedule pane*. This lists the operator names assigned to the logged-in manager. It also displays the scheduled Incident tickets across the given time scale. The time scale is divided into hourly (or user defined) segments. Only those Incident tickets associated with the manager's assignment group(s) will be displayed.

- Use the scroll bars to slide back and forth along the time scale to view all assigned Incident tickets for the given period.

The **Count** column to the right of the time scale shows the outstanding (incomplete) Incidents tickets, Change requests, Request quotes, and their associated tasks for each Operator. The **Utilization** column shows the operator utilization rates for the selected time scale.

■ Click the **right mouse** button and select the column(s) to be displayed in the Schedule window.

Note: You must select at least one column.

For more information, see *The Schedule Pane* on page 36.

At the bottom of the Schedule window is the *Spreadsheet pane.* This is a read-only spreadsheet, divided into columns that contain the details of each Incident, Change, Request, and Task in the system. For more information, see *The Task Spreadsheet Pane* on page 39.
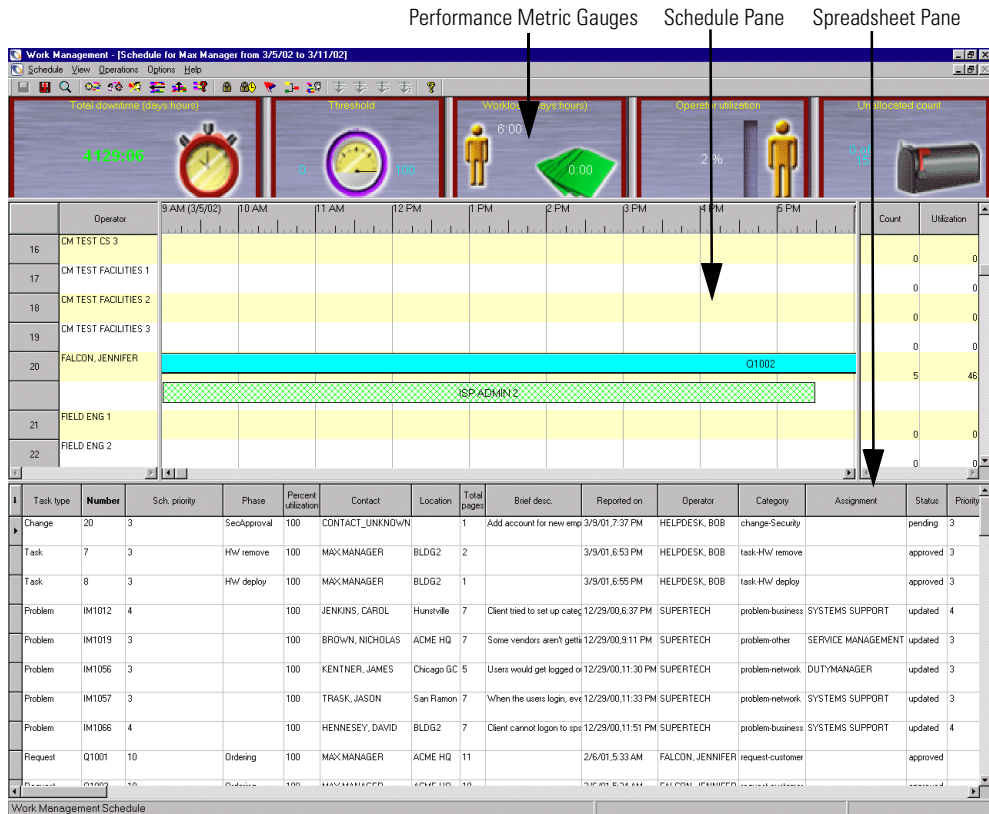
Figure 2-7: Schedule Window

The Performance Gauges

Total Downtime/Response time

The first gauge displays either the downtime or response time of the schedule, according to what you select in the Customize dialog box, reached through the **Customize...** option in the **Options** menu. For more information, see *Gauge Panel* on page 182. The display format is *days:hours.*
Response Time is never displayed when Total Downtime is, and vise versa. The label of this gauge changes to reflect the selected measurement.

Total Downtime is a measure of the amount of time contacts wait until their Incidents tickets, Change requests, Request quotes, and their associated tasks are resolved. This measure can be monitored to choose the assignment group for the best responsiveness. Total downtime is calculated by summing the downtime for all of the Incidents tickets, Change requests, Request quotes, and their associated tasks in the schedule.

Response Time is the average time of all unallocated Incident tickets in the schedule and mailbox. Response time is an average calculated by dividing the total response time for all Incidents tickets, Change requests, Request quotes, and their associated tasks by the number of Incidents tickets, Change requests, Request quotes, and their associated tasks in the schedule.

For calculation purposes, Incidents tickets, Change requests, Request quotes, and their associated tasks in the mailbox are assumed to be scheduled at the current time.

Threshold/Satisfaction

The second gauge shows either the Threshold or Satisfaction. Incidents tickets, Change requests, Request quotes, and their associated tasks that have a downtime greater than the **Threshold downtime** value as a percentage of the total number of items in the Schedule window. The **Threshold downtime** value can be set from the Customize dialog box, reached through the **Customize...** option in the **Options** menu. For more information, see *Gauge Panel* on page 182.

Threshold shows (in percentage terms) the ratio of Incidents tickets, Change requests, Request quotes, and their associated tasks which have a downtime value greater than the Overall downtime threshold value, versus the total number of items in the schedule and the mailbox. The Overall downtime threshold can be defined using the Customize option from the Options menu.

Satisfaction is the average customer satisfaction associated with the current schedule in the scale 1 to 10. This value is calculated from all the Incidents tickets, Change requests, Request quotes, and their associated tasks in the Schedule window and the mailbox, using the Satisfaction values defined in the Category dialog box. If no satisfaction values are entered into the system, Work Management retains a value of *10*, the highest satisfaction rating, for all Incident categories. Any category without a satisfaction definition automatically defaults to *10* as well.

Workload
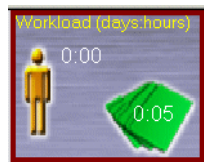
The third gauge indicates the workload of the incomplete Incidents tickets, Change requests, Request quotes, and their associated tasks. It is calculated as the sum of the durations of all the incomplete Incidents tickets, Change requests, Request quotes, and their associated tasks that have been scheduled and all Incidents tickets, Change requests, Request quotes, and their associated tasks from the mailbox. The duration of the Incidents tickets, Change requests, Request quotes, and their associated tasks in the mailbox is assumed to be the default duration for that category as given in the Category dialog.

Workload is an internal measure that gives the total workload of the Incidents tickets, Change requests, Request quotes, and their associated tasks. It is calculated as the sum of the durations of all the incomplete Incidents tickets, Change requests, Request quotes, and their associated tasks that have been scheduled and all Incidents tickets, Change requests, Request quotes, and their associated tasks from the mailbox. The duration of the items in the mailbox is assumed to be the default duration for that category as given in the Category dialog box.

Operator Utilization

The fourth gauge indicates the operator utilization for the selected time scale. This utilization percentage pertains to those operators listed at the left of the Schedule window. The utilization is calculated by comparing the amount of time each operator is scheduled to spend resolving Incidents, Changes, Requests, or Tasks over a given time period. For example, if an operator spends 7 out of 8 hours resolving assigned items, the utilization rate for that period will be 88%. If the time scale were two days, and if no additional Incidents, Changes, Requests, or Tasks were scheduled for the following day, then the utilization rate would drop to 44%.

Factors that affect operator utilization are the number of Incidents tickets, Change requests, Request quotes, and their associated tasks in the schedule and the length of the time scale or the availability of the operator. Provides an internal measure. It is more important to the Help Desk than the contact, displaying the degree to which a Help Desk effectively utilizes its technical or related support staff (operators). This metric allows managers to schedule Incidents tickets, Change requests, Request quotes, and their associated tasks with target operator utilization in mind. Skill levels can be specified if desired to allow for even more sophisticated deployment.

Unallocated Count/Mailbox

The fifth gauge shows the number of unallocated Incidents tickets, Change requests, Request quotes, and their associated tasks waiting to be scheduled against the total number of incomplete Incidents tickets, Change requests, Request quotes, and their associated tasks in the schedule. Incidents tickets, Change requests, Request quotes, and their associated tasks that have been entered into the system, but remain unscheduled, are considered *unallocated*. This includes items that were removed from the schedule by selecting **Unallocate** from the **Operations** menu. (Also referred to as the *Mailbox)* lists all Incidents tickets, Change requests, Request quotes, and their associated tasks (quotes) in the queue currently open. The number of unallocated (unassigned) Incidents tickets, Change requests, Request quotes, and their associated tasks is stated versus the number of total items.
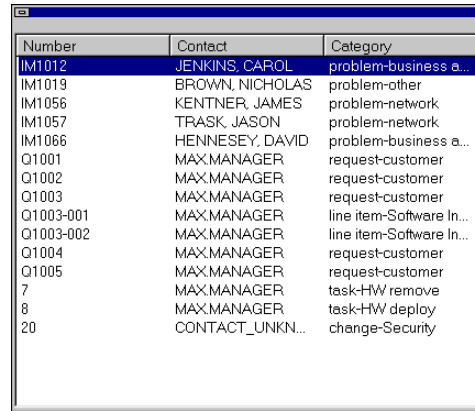
Mailbox Dialog Box

To display current unallocated Incidents tickets, Change requests, Request quotes, and their associated tasks:

1 Click the **Unallocated count** (*mailbox*) gauge.

The mailbox dialog box displays a list of unscheduled Incidents tickets, Change requests, Request quotes, and their associated tasks (those not assigned to an operator).

The mailbox lists the number, contact, and category for each item.

Number	Contact	Category
IM1012	JENKINS, CAROL	problem-business a...
IM1019	BROWN, NICHOLAS	problem-other
IM1056	KENTNER, JAMES	problem-network
IM1057	TRASK, JASON	problem-network
IM1066	HENNESEY, DAVID	problem-business a...
Q1001	MAX.MANAGER	request-customer
Q1002	MAX.MANAGER	request-customer
Q1003	MAX.MANAGER	request-customer
Q1003-001	MAX.MANAGER	line item-Software In...
Q1003-002	MAX.MANAGER	line item-Software In...
Q1004	MAX.MANAGER	request-customer
Q1005	MAX.MANAGER	request-customer
7	MAX.MANAGER	task-HW remove
8	MAX.MANAGER	task-HW deploy
20	CONTACT_UNKN...	change-Security

Figure 2-8: Mailbox List

2 Unallocated items are sorted by descending order of age by default.

To change the sort order:

a Click the right-mouse button on the Mailbox dialog box.

b Select either **Sort by Age** or **Sort by Priority**.

c Select either *Ascending* or *Descending* order.

3 Double-click any item listed in the mailbox.

The standard ServiceCenter **Details** screen is displayed in a separate window.

Figure 2-9: ServiceCenter Incident Record

The Incident, Change, Request, or Task Details screen provides more information on the nature of the item, the contact who reported it, and any resolutions used in the past to handle similar Incidents, Changes, Requests, or Tasks.

4 To close the window, click **Back.** For more information, see *Additional Record Details on page 128*.

The Schedule Pane

Operator List Column

The operator list column displays the operators assigned to the manager currently logged in. The operators are listed and sorted alphabetically by name, either first or last, according to how they were entered into the system.

Schedule Column

The Schedule Column displays the assigned Incidents tickets, Change requests, Request quotes, and their associated tasks for each operator. Figure 2-10 shows how the items are presented as bars, color coded to denote priority level and status (incomplete or complete). The color values and captions are modified through the Customize dialog box, reached through the **Customize...** option in the **Options** menu. For more information, see *Colors* on page 178.

The Incidents tickets, Change requests, Request quotes, and their associated tasks bars are positioned to correspond to the date and time they are scheduled. The length of the bar across the Time scale represents the estimated duration of the item, or how long it should take that operator to resolve the Incident, Change, Request, or Task (based on the operator's experience and the difficulty or experience requirements of the particular item). Each item carries a unique ServiceCenter ticket number, for example, *PM123*, displayed on the color-coded ticket bars. The vertical grey bar represents the start and end of a break period.
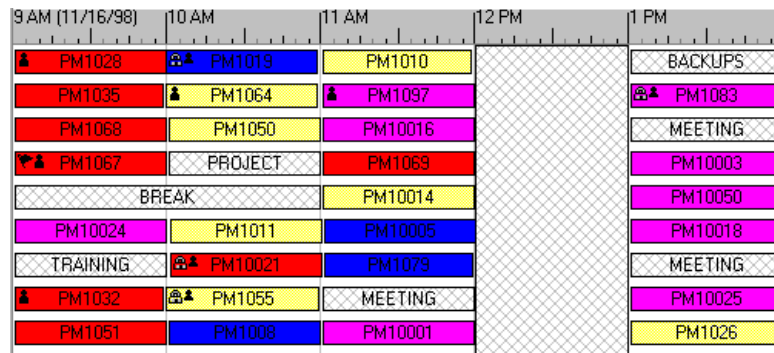
Figure 2-10: Scheduled Tasks and Break Period

Timescale Timeline

The time scale is an adjustable time line that appears at the top of the Schedule pane. It displays the period of time in which Incidents tickets, Change requests, Request quotes, and their associated tasks are scheduled for help desk operators.

The time scale is adjusted by double-clicking on the time line or from the Customize dialog box, reached through the **Time scale** option in the **Options** menu. For more information, see *Work Management Time Scale Configuration* on page 47.
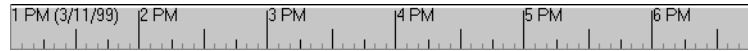
Count Column
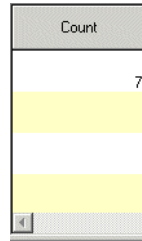
The Count column shows the outstanding Incidents tickets, Change requests, Request quotes, and their associated tasks for each Operator. Outstanding Incidents tickets, Change requests, Request quotes, and their associated tasks are those items that are incomplete.

Utilization Column
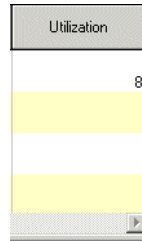
The Utilization column displays the utilization of each operator as a percentage based on the timescale duration or the available time of the operators

Filtering the Schedule Window

Users can select certain attributes of an Incident, Change, Request, or Task and apply the filter to see all the item bars that satisfy the condition in the Schedule window. The filter can be a combination of different Incident, Change, Request, or Task attributes. To specify dates in the Value column, double-click to select from the calendar.

Actual Duration	**Actual End date and time**	**Actual Start date and time**
Assignment Group	Brief Description	Category
Contact	Cost	Downtime

Actual Duration	Actual End date and time	Actual Start date and time
Date & time Incident was reported	Expertise Required	Estimated Duration
Lock	Number	Operator
Priority	Scheduled start date and time	Scheduled End date and time
Status	Total pages	User-defined fields
Ticket type	Phase	Parent

The Task Spreadsheet Pane

At the bottom of the Schedule window is the Spreadsheet pane. This is a read-only spreadsheet, divided into columns that contain the details of each Incident, Change, Request, and Task in the system.

Task type	Number	Brief desc.	Reported on	Operator	Category	Assignment	Status	Priority	Expertise	Scheduled	Sch. end	Actual start	Actual end	Duration	Travel time	Total duration	Act duration
Change	20	Add account for new emp	3/9/01,7:37 PM	HELPDESK, BOB	change-Security		pending	3	Beginner	3/5/02,9:00 AM	3/6/02,2:30 PM			0:08:00	0:06:00	1:05:30	
Task	7		3/9/01,6:53 PM	HELPDESK, BOB	task-HW remove		approved	3	Beginner	3/4/02,11:50 AM	3/4/02,1:05 PM			0:01:00	0:00:15	0:01:15	
Task	8		3/9/01,6:55 PM	HELPDESK, BOB	task-HW deploy		approved	3	Beginner	3/4/02,1:05 PM	3/4/02,3:05 PM			0:02:00	0:00:45	0:02:00	
Problem	IM1012	Client tried to set up categ	12/29/00,6:37 PM	SUPERTECH	problem-business	SYSTEMS SUPPORT	updated	4	Beginner	3/4/02,5:00 PM	3/5/02,9:30 AM			0:01:00	0:00:00	0:01:00	
Problem	IM1019	Some vendors aren't getti	12/29/00,9:11 PM	SUPERTECH	problem-other	SERVICE MANAGEMENT	updated	3	Beginner	3/4/02,11:50 AM	3/4/02,12:50 PM			0:01:00	0:00:00	0:01:00	
Problem	IM1056	Users would get logged o	12/29/00,11:30 PM	SUPERTECH	problem-network	DUTYMANAGER	updated	3	Beginner	3/4/02,12:50 PM	3/4/02,4:00 PM			0:03:00	0:00:10	0:03:10	
Problem	IM1057	When the users login, eve	12/29/00,11:33 PM	SUPERTECH	problem-network	SYSTEMS SUPPORT	updated	3	Beginner	3/4/02,4:00 PM	3/4/02,5:00 PM			0:01:00	0:00:00	0:01:00	
Problem	IM1066	Client cannot logon to sps	12/29/00,11:51 PM	SUPERTECH	problem-business	SYSTEMS SUPPORT	updated	4	Beginner	3/5/02,9:30 AM	3/5/02,10:30 AM			0:01:00	0:00:00	0:01:00	
Request	Q1001		2/6/01,5:33 AM	FALCON, JENNIFER	request-customer		approved		Beginner	3/4/02,12:50 PM	3/4/02,1:50 PM			0:01:00	0:00:00	0:01:00	
Request	Q1002		2/6/01,5:34 AM	FALCON, JENNIFER	request-customer		approved		Beginner	3/4/02,3:50 PM	3/6/02,4:05 PM			2:00:00	0:00:15	2:00:15	
Request	Q1003		2/6/01,5:36 AM	FALCON, JENNIFER	request-customer		pending		Beginner	3/4/02,1:50 PM	3/4/02,3:50 PM			0:02:00	0:00:00	0:02:00	

Figure 2-11: The Task Spreadsheet

To adjust the column width:

1 Move the cursor to the right edge of any of the column headers.

The cursor changes to a vertical bar with arrows facing both left and right.

2 Press and hold the left mouse button.

3 Drag the column border either left or right.

4 Release the mouse button when the border is positioned as desired.

5 To hide a column, drag its right border left until it meets the right border of the next column.

Verifying Data Elements in the Spreadsheet Pane

The following data elements of Work Management can be viewed by scrolling side-to-side using the scroll bar at the bottom of the Incident Spreadsheet pane:

- Number (Incident ID)
- Contact
- Reported on
- Assignment
- Expertise
- Actual start (date and time)
- Actual duration
- User-defined field
- Task Type
- Parent

- Priority
- Total pages
- Operator
- Locks
- Scheduled (start date & time)
- Actual end (date and time)
- Downtime
- Completed
- Percent Utilization

- Scheduled Priority
- Brief description
- Category
- Severity
- Scheduled End (date and time)
- Duration
- Cost
- Color
- Phase

Incident, Change, Request, and Task viewing from the Spreadsheet Pane

When you highlight any ticket bar in the Schedule pane of the Schedule window, the associated row in the Spreadsheet pane is also highlighted. For more information, see *The Schedule Window* on page 30. Work Management automatically scrolls the spreadsheet so that the corresponding row is visible at the top of the spreadsheet pane.

When you click a row in the Spreadsheet pane, the action highlights the corresponding ticket bar in the Schedule pane.

When you double-click any of the cells in a particular row, or on the ticket bar in the Schedule window, this action opens the ServiceCenter Incident, Change, Request, or Task dialog. The selected item is displayed. For more information, see *Schedule Window* on page 127.

Work Management Menu Structure

The following menus and menu item selections are available from the Schedule window.

- *The Schedule Menu* on page 41
- *The View Menu* on page 42
- *The Operations Menu* on page 44
- *The Options Menu* on page 45
- *The Help Menu* on page 46

The Schedule Menu
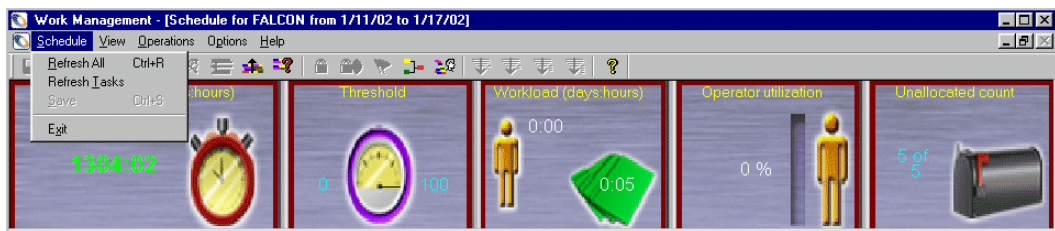
Figure 2-12: The Schedule Menu

Option	Definition
Refresh All	Refreshes and updates the Schedule window display to show any changes that occurred since the last Refresh or database save.
Refresh Tasks	Refreshes and updates the Tasks window display.
Save	Saves the current schedule to the database.
Exit	Closes Work Management.

The View Menu
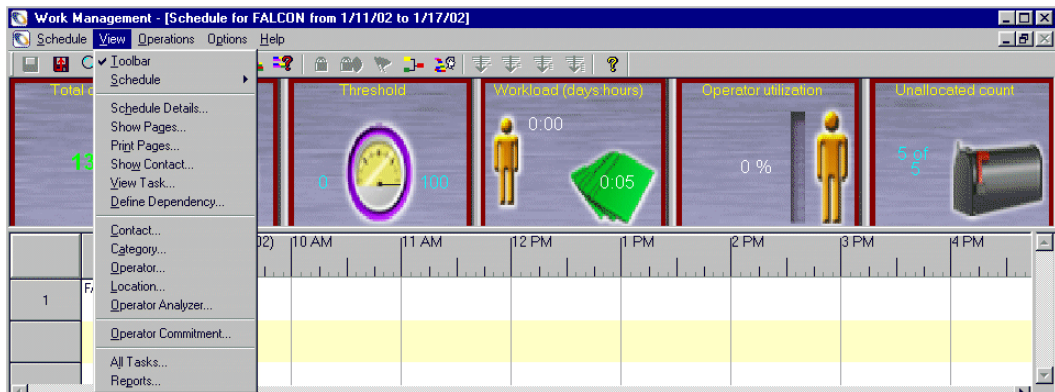
Figure 2-13: The View Menu

Menu Item	Definition
Toolbar	Shows and hides the Work Management toolbar/
Schedule	Offers several options: **Apply Filter**: Applies the existing filter for contact, category to incident/change to the items displayed in the Schedule window. The filter settings are reached through the *Customize* dialog box, reached from the **Filters...** option on the **Options** menu. **Show Related**: Shows all those tasks which are related to the selected task, and hides all others. **Show Dependency**: Modifies display to show relationships between Changes, Tasks, and Requests in the Schedule window. For more information, see *Show Dependency* on page 151. **Show Over Commitment**: Shows those areas in the schedule where resources are over committed.
Schedule Details...	Displays the Incident/Change Details dialog in the current window, showing details of which operator has which ticket, when the ticket was received, assignments, etc.
Show Pages...	Displays the SC record for the selected Incident, Change, Request, or Task.
Print Pages...	Prints the record for the selected Incident, Change, Request, or Task.

Menu Item	Definition
Show Contact...	Displays details of the contact reporting the issue in a selected Incident ticket.
View Task...	Opens the SC record for the selected task.
Define Dependency...	Opens a dialog box which allows the creation of dependencies.
Contact...	Opens the Contact dialog box to allow viewing/editing of the contact list and related attributes.
Category...	Opens the Category dialog box to allow viewing/editing of Incident, Change, Request, and Task categories.
Operator...	Opens the Operator dialog box to allow viewing/editing of help desk operators and their expertise information.
Location...	Opens the Location dialog box to allow viewing/editing of operator location and travel time.
Operator Analyzer...	Opens the Operator Analyzer and displays the task count, utilization, remaining availability, or total availability for each operator.
Operator Commitment...	Opens the Operator Commitment dialog box to allow adding/viewing/editing of commitment for each operator.
All Tasks...	Opens the All Tasks Details dialog box, and allows viewing of all the contact, operator and other details associated with each Incident, Change, Request, or Task in the system.
Reports...	Opens the Reports dialog box to allow selection and output of reports.

The Operations Menu
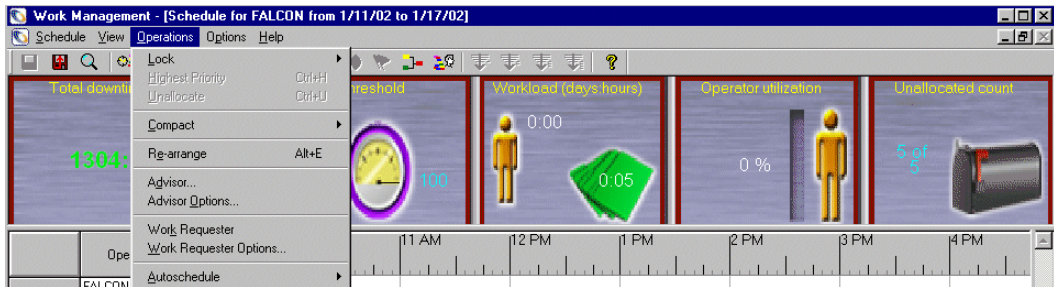
Figure 2-14: The Operations Menu

Menu Item	Definition
Lock	Provides the option of locking a selected ticket to a specific operator and the option to lock an Incident, Change, Request, and Task to a specific operator and time.
Highest Priority	Modifies the priority/severity of the selected item to the highest on the system, including changing the ticket bar color.
Unallocate	Unassigns the selected Incident, Change, Request, or Task, returning it to the *mailbox* (Unallocated Incidents gauge).
Compact	Moves all tickets in the schedule together, removing spaces between tickets and positioning all in current time scale.
Re-arrange	Compresses superfluous assignment rows of the Schedule pane, created as Incidents tickets, Change requests, Request quotes, and their associated tasks are assigned, then moved throughout the schedule
Advisor...	Provides recommendations on scheduling a task.
Advisor Options...	Opens the dialog box and allows viewing/editing of operator advisor options based on either location, response time, earliest start date, or latest end.
Work Requestor	Allocates the requested number of tasks.

Menu Item	Definition
Work Requestor Options...	Opens the Work Requestor Options dialog box. Allows requestor options based on priority, location, or earliest start date. Also allows either allocated or unallocated tasks to be requested.
Autoschedule	Allocates all Incidents tickets, Change requests, Request quotes, and their associated tasks in queue to appropriate operators, based on user-defined criteria and operator expertise.

The Options Menu
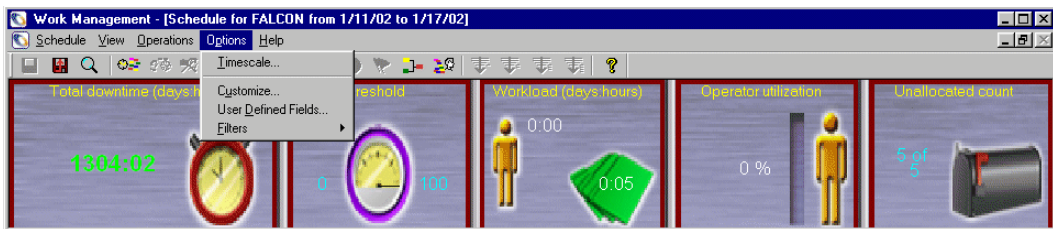
Figure 2-15: The Options Menu

Menu Item	Definition
Timescale...	Opens the Timescale dialog box to allow changing of the timescale.
Customize...	Opens the Customize dialog box to allow changing of system options.

Menu Item	Definition
User-Defined Fields...	Opens the User-defined Fields dialog box to allow editing of user-defined fields.
Filters	Opens the filter option controls.
	Contact: Opens Contact filter setup dialog box, where the user specifies which contacts should be known when the Contact dialog is opened. For more information, see *Filtering the Contacts List* on page 63.
	Incident/Change Details: Opens the Incident/Change Details filter setup dialog box, where the user specifies conditions which are used to filter Incidents tickets, Change requests, Request quotes, and their associated tasks. Only tickets which satisfy these conditions are displayed in the All Incident ticket Details window. For more information, see *Filtering ServiceCenter Record Items* on page 129.
	Schedule Window: Opens the Schedule Filter dialog box, where the user specifies conditions which are used to control how Incident, Change, Request, and Task data is organized in the Schedule pane of the Schedule window. For more information, see *Filtering the Schedule Window* on page 38.

The Help Menu
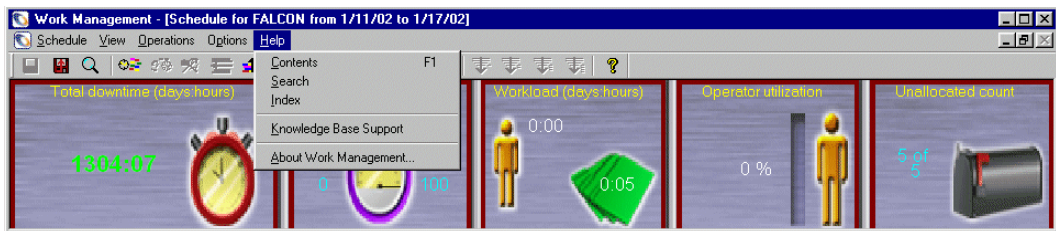
Figure 2-16: The Help Menu

Menu Item	Definition
Contents	Displays the Help system contents topic.
Search	Displays the Help system search page.
Index	Displays the Help system Index page.

Menu Item	Definition
Knowledge Base Support	Starts an external knowledge base help file as specified on the Others tab on the Customize dialog box, reached from the **Customize...** option on the Options menu.
About Work Management...	Displays the About dialog with version and licensing information for this particular copy of Work Management.

Work Management Time Scale Configuration

The Timescale determines the length of time presented in the Schedule window. Modifying the Timescale setting will allow you to zoom in or out of the schedule to see a day, week or month at a glance.

To open the Timescale dialog box:

1 Pull down the **Options** menu. For more information, see *The Options Menu* on page 45.

2 Select **Timescale….**

▶ You can also access this dialog box by double-clicking the Time scale bar in the Schedule window. For more information, see *The Work Management Desktop* on page 29.
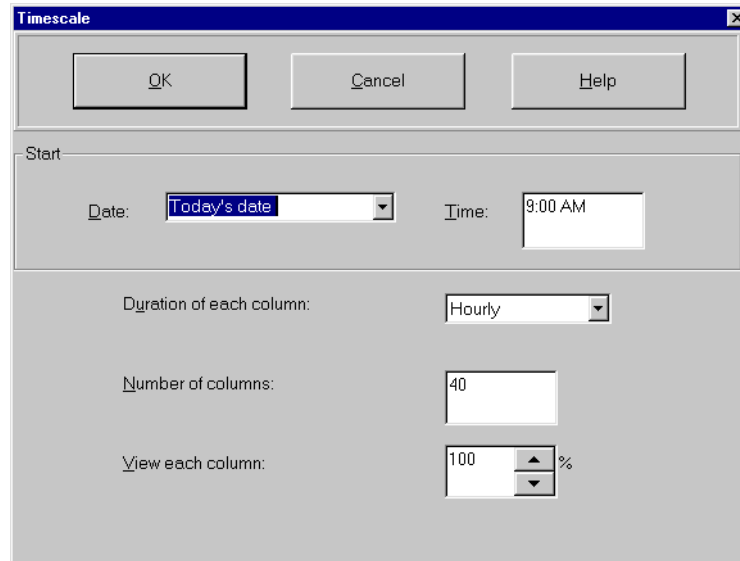
Figure 2-17: The Timescale Dialog Box

Field	Definition
Start Date	Identifies the beginning date of the Timescale period. Setting this to *Today's date* will ensure that the Timescale start date will always correspond to the system date. The default value for Start Date is *Today's date*, or the current system date.
Start Time	Defines the start time of the Timescale. The default value for Start Time is the start of the working hours of the organization, as defined in the Calendar.
Duration of each column	Refers to the number of hours shown by each column of the Time scale. The default duration setting is *Hourly*, one hour per cell. Changes tasks, and requests often require more than a single day for fulfillment, therefore, additional options in the drop down menu include *Daily, Weekly* and *Monthly*.

Field	Definition
Number of columns	Determines the total amount of time displayed in the Schedule window. Changing this setting lengthens or shortens the scope of the Timescale. The default setting is *40* columns.
View each column	Determines how many pixels are associated with the time duration of each column. Modifying this setting allows you to define how much time is actually visible on the screen; you could zoom in or out to see hours or days or weeks worth of work on the same Schedule window. The default setting is *100* pixels.

Timescale Setting Modifications

To change the Start Date setting:

1 Highlight the Date field in the Start panel.

2 Enter the new value.

For the date, make sure to use the same format as defined in the Windows Control Panel (in most cases, the format will be *mm/dd/yy*). This overwrites the default value, *Today's date*.

The option, *Today's date*, as well as the last user-selected date, are saved by Work Management and available for selection in the **Start Date** menu.

To select an entry in the drop-down menu:

a Click the arrow to the right of the box.

b Select a value. From the keyboard, use the arrow keys to navigate through the list.

3 To change the Start Time setting:

a Highlight the Time field in the Start panel.

b Type in the desired time, including *AM* or *PM*. If you omit *AM* or *PM*, Work Management automatically inserts *AM*. For example, with working hours of 9:00 AM to 5:00 PM, Work Management reads both 11:00 and 3:00 as *AM*.

4 To change Duration of each column:

a Select the arrow fill button to the right of the field.

b From the drop down menu, click a duration option.

c The duration of each column must be one of the provided option from *Hourly* to *Monthly*.

5 To change Number of columns or View each column:

    a Click the desired field.

    b Enter your selection.

    c For the View of each column% field, use the scroll bars at the right of the field to raise/lower the value.

    The **Number of columns** setting must be between 1 and 320.

The **View each column** setting is measured in percentage, and it must be between 100 and 1, 000.

The values given in these final three fields are interdependent; you are not able to use the maximum values defined in the fields simultaneously.

3 Defining Contacts

This chapter is an introduction to Contact Records in Work Management for the ServiceCenter administrator, manager, or user. It introduces process of establishing contacts and tying them in with other elements in the ServiceCenter database.

Read this chapter for information about:

Introduction

The Work Management system diagram below shows the basic functions performed by the Help Desk and the order in which they occur. During this sequence, the status of Incidents tickets, Change requests, Request quotes, and their associated tasks are periodically updated and recorded in the Work Management database.

Record	Data
Contacts	Users who issue requests for Help Desk assistance.
Incidents	Specific incidents reported by contacts.
Change	Requests put forth by a contact or a member of the organization.
Tasks	The various tasks involved in completing a change.
Categories	Types of Incidents tickets, Change requests, Request quotes, and their associated tasks identified by an organization.
Operators	People assigned by the Help Desk to resolve the Incidents tickets, Change requests, Request quotes, and their associated tasks for the contacts.
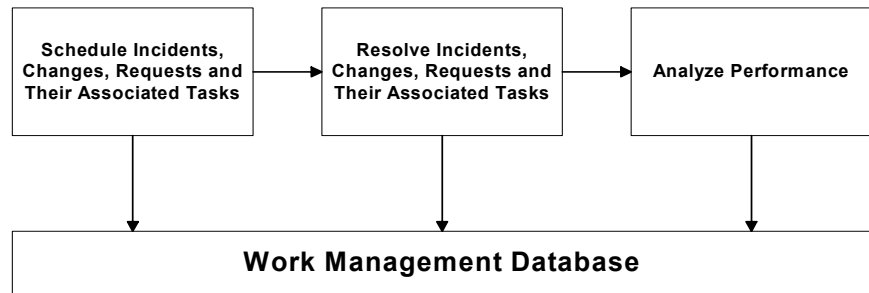
Figure 3-1: Work Management Structure

Viewing and Editing Contact Records

Capturing information about your contacts and their needs is the key to operating a successful Help Desk. Work Management maintains a database of contact information, complete with assigned priority levels and service level requirements. From the Work Management Schedule window, you can view all of the contacts currently defined in Work Management.
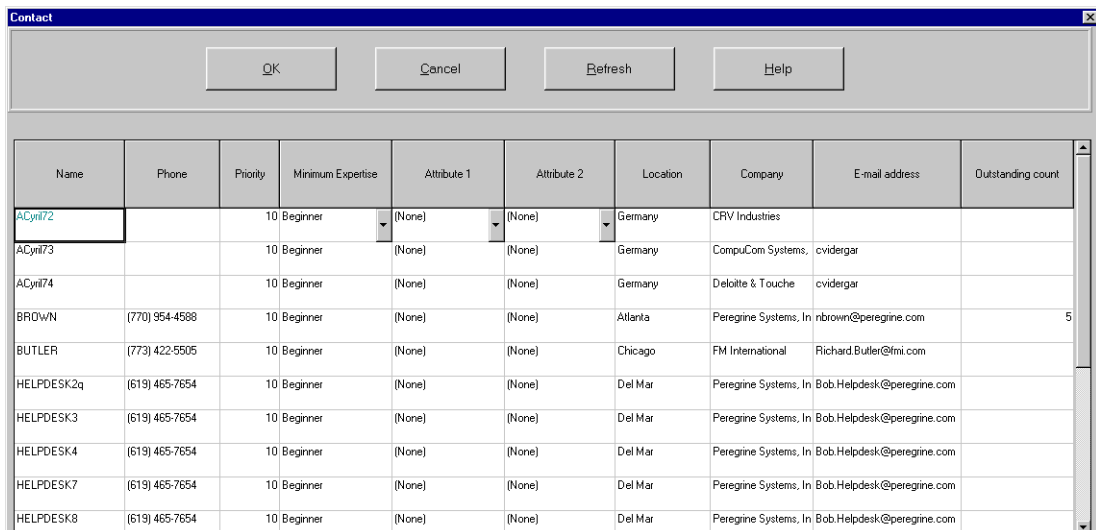
Displaying the Contacts List

To add new contact details or edit some of the attributes of a contact:

1 Log in as a Manager.

2 Pull down the **View** menu.

3 Select the **Contact…** option.

The Contacts filter list is displayed — a list of the first 150 contacts, based on the setting of the Contact Filter.

Note: The default setting for the Contact Filter is to show contacts starting with *A*; however if the total number of contacts exceeds 150, only the first 150 contacts are displayed.

Name	Phone	Priority	Minimum Expertise	Attribute 1	Attribute 2	Location	Company	E-mail address	Outstanding count
ACyril72		10	Beginner	(None)	(None)	Germany	CRV Industries		
ACyril73		10	Beginner	(None)	(None)	Germany	CompuCom Systems,	cvidergar	
ACyril74		10	Beginner	(None)	(None)	Germany	Deloitte & Touche	cvidergar	
BROWN	(770) 954-4588	10	Beginner	(None)	(None)	Atlanta	Peregrine Systems, In	nbrown@peregrine.com	5
BUTLER	(773) 422-5505	10	Beginner	(None)	(None)	Chicago	FM International	Richard.Butler@fmi.com	
HELPDESK2q	(619) 465-7654	10	Beginner	(None)	(None)	Del Mar	Peregrine Systems, In	Bob.Helpdesk@peregrine.com	
HELPDESK3	(619) 465-7654	10	Beginner	(None)	(None)	Del Mar	Peregrine Systems, In	Bob.Helpdesk@peregrine.com	
HELPDESK4	(619) 465-7654	10	Beginner	(None)	(None)	Del Mar	Peregrine Systems, In	Bob.Helpdesk@peregrine.com	
HELPDESK7	(619) 465-7654	10	Beginner	(None)	(None)	Del Mar	Peregrine Systems, In	Bob.Helpdesk@peregrine.com	
HELPDESK8	(619) 465-7654	10	Beginner	(None)	(None)	Del Mar	Peregrine Systems, In	Bob.Helpdesk@peregrine.com	

Figure 3-2: Contact List Dialog

Work Management has ten attributes for each contact, displayed in the columns of the Contact Filter list.

Column	Data
Name	This is a required field and must contain a name for every contact. Name is a required field and must contain a unique value for each record. The list of contacts is displayed in sequential fashion, sorted alphabetically by name. You can enter first names first or last names first. Work Management will sort the contacts by the first letter of the first word in the name. For example, if you were to enter a contact as *Jones, Henry*, the name would be sorted by *J*. If you were to enter the same contact as *Henry Jones*, the name would be sorted by *H*.
Phone	Used to enter the telephone or voice mail number of the contact.
Priority	Used to enter the priority you assign to the contact. This value is not used by the Scheduler to arrive at an optimized schedule. Work Management will automatically update the Priority column with the default value of *10.*
Minimum Expertise	Indicates the lowest acceptable expertise level for any operator assigned to resolve a contact's Incident tickets. By capturing the Minimum Expertise requirements, you can ensure that certain contacts receive preferred levels of service. When scheduling, Work Management will only assign technicians who meet or exceed the minimum skill required. You can choose from a combo box menu of expertise levels when defining the Minimum Expertise for a contact. If the cell is left blank, the system will default to the lowest minimum expertise level defined in the system for all new contacts. The default setting for this value is *Beginner*.
User-defined Fields *Attribute 1, Attribute 2, Location, Company*	The labels and data values tracked by the user-defined fields can be changed at the home menu by pulling down the Options menu and choosing the User Defined fields... option. You can enter any value in these fields. These values are not validated against any list of data values; they are used for reporting purposes only.
Location	Record the contact's address or other relevant location information, such as a location number.
Travel Time	Specify the distance to the contact's location in units of time.

Column	Data
E-mail address	Used to enter the e-mail address of the contact.
Outstanding count	Indicates the number of incomplete Incidents tickets, Change requests, Request quotes, and their associated tasks for each contact. This value is computed by Work Management and cannot be edited.

Navigating The Contacts Filter List

You can navigate through the Contacts Filter list as follows:

- Resize columns by positioning the cursor on the divider and sliding the divider to the right size. Click the OK button to save these changes.

- Use the Tab key to move through the entire range of buttons in the panel, then move the focus to the first cell of the spreadsheet, after which the directional keys are used to move through the cells.

- Use the Enter key to move between cells in each row.

- Use the Up, Down, Left, and Right Arrow keys to move within the spreadsheet.

- Double-clicking one of the cells in the Outstanding Count field will open the *Incident/Change* dialog box.   The incomplete Incidents tickets, Change requests, Request quotes, and their associated tasks for that contact are displayed in the ascending order of item numbers. This includes Incidents tickets, Change requests, Request quotes, and their associated tasks that have not yet been allocated. Only items belonging to the manager logged in will be displayed. On exiting the dialog box, you will return to the same row in the Contact spreadsheet.

- Click OK to save any changes made to the database during the session.

- Click Cancel to ignore any changes.

Keyboard Shortcuts

You can utilize the following keyboard shortcuts when navigating the Contacts list:

- Ctrl+End moves the cursor to the last cell of the list.

- Ctrl+Home highlights the Name cell of the first record in the list.

- The Home key highlights the Name cell of the current row.

- The End key highlights the Outstanding Count cell of the current row.

Viewing Contact Details

The Show Contact dialog shows the details of the contact for the Incident, Change, Request, or Task, which is currently active.

The Show Contact option is accessed in the following ways:

To access Show Contact through the Incident/Change Details dialog:

1 Select the Incident, Change, Request, or Task.
2 Click with the right mouse button to reveal the short-cut menu.
3 Select **Show Contact**.

To access Show Contact through the Incident Spreadsheet pane:

1 Highlight an Incident, Change, Request, or Task.
2 Click with the right mouse button to reveal the short-cut menu.
3 Select **Show Contact**.

To access Show Contact through the Schedule window pane:

1 Highlight an Incident, Change, Request, or Task.
2 Click with the right mouse button to reveal the short-cut menu.
3 Select **Show Contact**. The contact details window is displayed.

Name:	WATSON
Last name:	Watson
First name:	Sarah
Phone:	(619) 455-7654
Ext:	219
Location:	Del Mar
Building:	
Floor:	20
Group:	MIS
User ID:	ABC00017
Asset tag #:	pc022
Department:	engineering
Title:	Senior Tech. Mgr.

Figure 3-3: Contact Details

4 Click the window to close it and return to regular operations in the Schedule window.

Adding New Contacts

Contacts are added to Work Management from ServiceCenter. Since Work Management displays the Incidents tickets, Change requests, Request quotes, and their associated tasks from ServiceCenter, it also uses the same database files for contacts. It displays those contacts satisfying the Work Management contacts filter criteria.

Adding a Contact in ServiceCenter

To add a new contact to ServiceCenter and Work Management:

1 Logon to ServiceCenter.

2 Click the **Database Manager** button on the **Toolkit** tab of the ServiceCenter home menu.
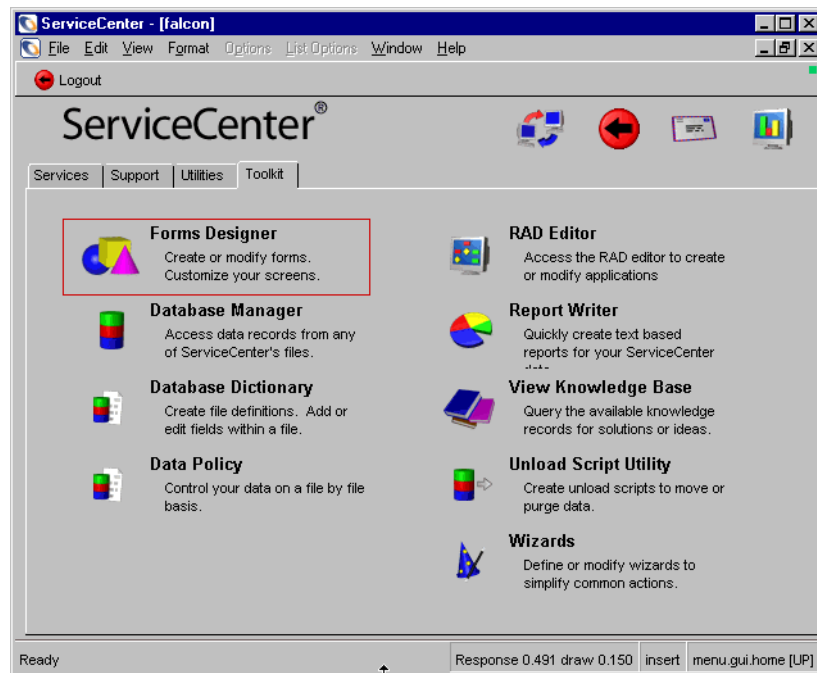
Table 3-1: Toolkit Tab of the ServiceCenter Home Menu

Database Manager opens.
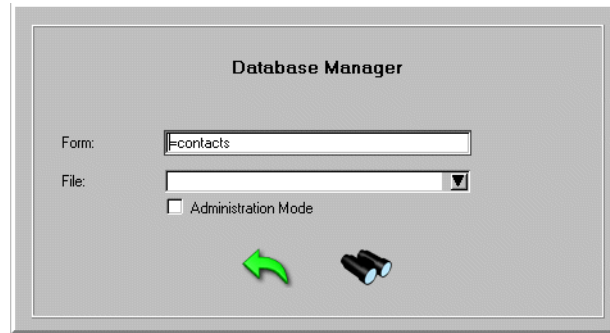
Figure 3-4: Database Manager

3 Enter =*contacts* in the **Form Name** field.

4 Press the **Enter** key or click the **Search** button.

The ServiceCenter Contact Information form is displayed.

5 Enter data for a new contact in the blank record as described below.

Figure 3-5: ServiceCenter Contact Record

By default the Work Management filter has been set up to recognize only contacts whose name begins with an uppercase *A*. For more information, see *Filtering the Contacts List* on page 63.
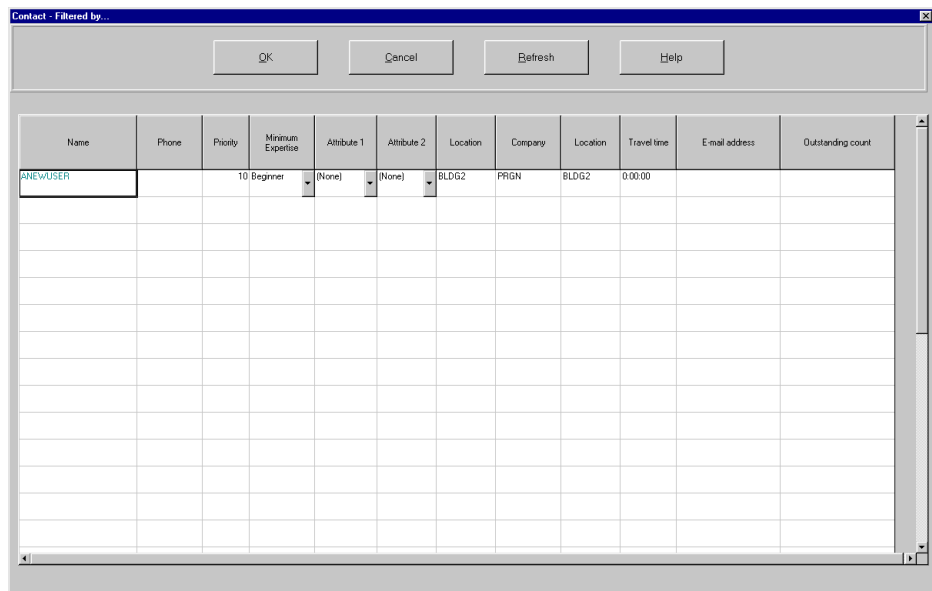
6 Add a user whose name begins with *A*, as shown in Figure 3-5.

7 Click the **Add** button to save this new contact to the contacts file.

A message appears at the bottom of the screen confirming that the Contact Information record has been added to the contacts file.

8 Verify the contact has been recognized by Work Management and appears in the Contacts Filter list. If it has not, perform steps 1 through 6 again and ensure the contact's name starts with an uppercase *A*.

Viewing the Contacts List

To view the Contact list:

1 From the Work Management home menu, pull down the **Schedule** menu.

2 Select the **Refresh All** option to make sure the latest data has been imported from the ServiceCenter database into Work Management.

3 From the **View** menu, select the **Contact…** option.

The Contact Filter list is displayed.

Figure 3-6: Work Management Contacts

Once a new contact name has been entered, the system automatically assigns a default Priority value of 10 and the lowest defined value for Minimum Expertise.

The cells for Phone and E -mail address remain blank.

Two of the user-defined fields, Attribute 1 and Attribute 2, default to a value of None. The other two user-defined fields, Company and Location are populated with the values defined in ServiceCenter for this contact.

Outstanding count is updated as Incidents tickets, Change requests, Request quotes, and their associated tasks are reported by this contact.

Refreshing the List of Contacts

At the top of the Contact Filter list is the Refresh button. This button is used to refresh your list with any new information captured by Work Management, such as the creation or modification of a contact by another user. Using refresh also updates the Contact column in the Schedule window with the latest number of outstanding Incidents tickets, Change requests, Request quotes, and their associated tasks for each contact.

To refresh the list:

▶ Click the **Refresh** button at the top of the Contact Filter dialog box.

This automatically updates your Contact information to make it current with the latest changes in the ServiceCenter/Work Management shared database**.**

Deleting Contacts

Contacts can only be removed from the ServiceCenter side.

To delete a contact:

1 Logon to ServiceCenter.

2 Click the **Database Manager** button from the **Toolkit** tab on the ServiceCenter home menu, as shown in Figure 3-1 on page 57. The Database Manager prompt appears as shown in Figure 3-4 on page 58.

3 Enter =*contacts* in the **Form Name** field.

4 Do one of the following:

- Press the **Enter** key to retrieve a list of all contacts in the file, then sort through the record list to locate the desired contact record.

- Enter the name of the contact in the **Contact Name** field, and click the **Search** button.

5 When the **Contact** record appears, click the **Delete** button.

A prompt dialog box asks you to confirm the delete action.

6 Press the **Yes** button to delete. Press the **Cancel** button to cancel the delete operation.

A message will appear in the status bar confirming the deletion.

Editing an Existing Contact Filter List

Editing in ServiceCenter

Name, Phone, Company, Location and Email address values must be edited in ServiceCenter using the contact information form.

To edit contact information in ServiceCenter:

1 Logon to ServiceCenter.

2 Click the **Database Manager** button from the **Toolkit** tab on the ServiceCenter home menu, as shown in Figure 3-1 on page 57. The Database Manager prompt appears, as shown in Figure 3-4 on page 58.

3 Enter =*contacts* in the **Form** field.

4 Do one of the following:

- Press the **Enter** key to retrieve a list of all contacts in the file, then sort through the record list to locate the desired contact record.

- Enter the name of the contact in the **Contact Name** field, and click the **Search** button.

To edit attributes of a contact:

1 In a blank form, enter the name of the contact in the **Contact Name** field.

2 Press **Enter**.

3 If a QBE list returns with several records meeting your search, select the desired contact from the list. If not, go to step 5.

4 Press **Enter**.

The selected Contact Information form appears.

5 Place the cursor in the field you wish to modify.

6 Enter the new values or overwrite the existing contents.

7 When completed, click the **Save** button in the tool tray to record your modifications.

A confirmation message appears at the bottom of the screen indicating that the record has been updated in the contacts file.

> **Important:** If this message indicates an error or does not appear, be sure to select the **View Messages** button in the menu bar to reveal the messages generated during this action. The processing messages indicate which actions occurred and where (if) any errors occurred in the process.

8 Return to the Work Management home menu.

9 Refresh the contacts display to see the modifications made to the Contact Information record. For more information, see *Viewing the Contacts List* on page 59.

Editing in Work Management

Priority, Minimum Expertise, and the user-defined field values not listed above can be edited directly in Work Management.

To enter new values for Priority:

1 Click in the desired cell.

2 Change **Priority** by entering a new value between *1* and *10* in the field.

To enter new values for Minimum Expertise:

1 Click the arrow to the right of the combo box.

2 Select a **Minimum Expertise** value from the drop-down menu.

To update the user-defined fields (Attribute 1 and Attribute 2)*:*

1 Click the arrow to the right of the combo box.

2 Select your choice from the list of options (if any are available).

> **Note:** You can also use the F2 key to toggle into Edit mode on the fields with arrow keys, and then use the Up and Down directional arrow keys to navigate through the list of choices.

3 Click **OK** to save any changes to the database.

4 Click **Cancel** to ignore them.

Once the changes have been saved, Work Management automatically re-sorts the list of contacts alphabetically by name to include any new entries.

Filtering the Contacts List

Work Management allows customization for how Contacts are filtered into Work Management.

Access the Contact Filter dialog box from the Work Management home menu:

1 Do one of the following:

- From the **Options** menu select **Filters** > **Contact**.
- From the Contact dialog box, right-mouse click a contact name and select **Filter** from the pop-up menu.

The **Contact Filter** dialog box appears.
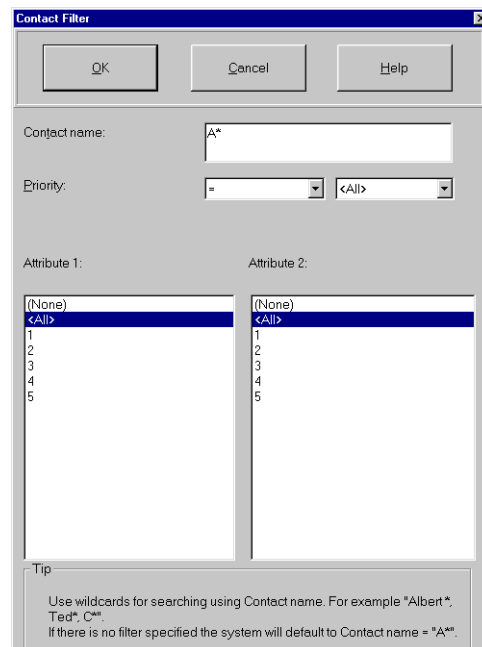
Figure 3-7: Work Management Contacts Filter Setup

2 In the Contact Filter dialog box provide field values as follows:

a Enter the wild card for the **Contact name** field.

This value is used to determine which contact to display, for example, *
imports all contacts in ServiceCenter and all their data; A* displays all
contacts whose names begin with A and are followed by any other
characters.

b Enter the condition for the **Priority** field.

This is another condition determining which contacts to bring into Work
Management. Your options in the first value field include, equals (=), less
than (<), greater than (>), less than or equal to (<=), greater than or equal
to (>=), and greater than or less than (<>).

The second value field lists the priority levels 1-10. For example, if you
select =2 in these fields, only contacts who have Incidents with a priority
of 2 will be imported into Work Management, where =>2 brings in all
with a priority of 2 or higher.

c Select the user-defined lists (*Attribute 1* and *Attribute 2*) if required.

Use the **Shift** or **Ctrl** keys to make multiple selections.

3 Click **OK** to save the filter option changes.

This filter is then used to display the contacts list in the Contact dialog box.

4 Categories

This chapter is an introduction to Categories in Work Management for the ServiceCenter administrator, manager, or user. It describes how to establish Incident, Change, Request, and Task categories, and tie them in with other elements in the ServiceCenter database.

Read this chapter for information about:

Viewing Categories

Work Management tracks incoming contact requests by category.

Work Management also records the priority levels and duration estimates for each category. From Work Management, you can view categories or edit the attributes of any existing category.

To view categories from the home menu:

1 Pull down the **View** menu.

2 Select the **Category…** option.

The Category record appears, displaying a list of categories.

	Name	Duration (days:hrs:mins)	Actual duration	Priority	Downtime that increases priority (days:hrs:mins)	Attribute 1	Attribute 2	Type	Information	Outstanding count
	DEFAULT	0:01:00		10		(None)	(None)	problem	DEFAULT	
	business applications	0:01:00		10		(None)	(None)	problem		2
	change	0:01:00		10		(None)	(None)	problem		
	client system	0:01:00		10		(None)	(None)	problem		
	enquiry	0:01:00		10		(None)	(None)	problem		
	example	0:01:00		10		(None)	(None)	problem		
	getservice	0:01:00		10		(None)	(None)	problem		
	network	0:01:00		10		(None)	(None)	problem		2
	other	0:01:00		10		(None)	(None)	problem		1
	printing	0:01:00		10		(None)	(None)	problem		
	security	0:01:00		10		(None)	(None)	problem		
	shared infrastructure	0:01:00		10		(None)	(None)	problem		
	tbd	0:01:00		10		(None)	(None)	problem		
	telecoms	0:01:00		10		(None)	(None)	problem		
	Application	0:01:00		10		(None)	(None)	change	Application	

Tips:

Figure 4-1: Work Management Categories

Each category has the following attributes: Name, Duration, Actual duration, Priority, Downtime that increases priority, Outstanding count, Satisfaction, Tips and four user-defined fields (*Attribute 1, Attribute 2, Type, Information*).

Attribute	Definition
Name	Identifies category name.
Duration	Amount of time required to resolve Incidents tickets, Change requests, Request quotes, and their associated tasks. This estimate is used by Work Management to allot an appropriate amount of time when scheduling these items. If no value is specified for an item category or type, the default value assigned by the system is *one hour* (00:01:00). Duration is expressed in the format *days:hours:minutes*, where a day is comprised of the available work hours, not necessarily 24 hours. If the work shift for a day is 8 hours, then every 8 hours of the duration is counted as a day. In this instance, if you enter a duration of 18 hours as 00:18:00, Work Management automatically changes the value to 2:02:00.
Actual Duration	Amount of time operators require to complete Incidents tickets, Change requests, Request quotes, and their associated tasks for a particular category. This value is computed by Work Management from the start and end times during a specified number of months for each completed item; this value cannot be edited. The method of calculating Actual Duration is defined for the organization. This default definition can be viewed from the Work Management home menu by opening the Options pull-down menu, selecting the Customize... option, and then clicking on the Others tab. The value is stated in the Information box at the bottom of the window.
Priority	Priority you assign to the category. This value is not used by the scheduler to arrive at an optimized schedule.
Downtime That Increases Priority	Length of time it takes to raise an Incident, Change, Request, or Task priority by one unit. For example, if the category called MS Paintbrush has a priority of *10* and a downtime value of *4 days*, then an outstanding Incident, Change, Request, or Task of this type becomes a priority *9* after 4 days, a priority *8* after 8 days, and so on.
Attribute 1 and Attribute 2	User-defined fields. Data is entered into these cells using a combo box of choices. The labels and data values tracked by the user-defined fields can be modified by selecting the User Defined fields... option in the Options pull-down menu in the Work Management home menu.

Attribute	Definition
Type	Displays the category type; Incident, Change, Request, or Task, defined in ServiceCenter.
Information	User-defined field indicating the assignment group responsible for Incidents tickets, Change requests, Request quotes, and their associated tasks of a certain category, for example, *HelpDesk*, *MIS*, etc. Note: The Type and Information fields are not validated against any list of data values. They are used for reporting purposes only.
Outstanding count	Number of open or unresolved Incidents tickets, Change requests, Request quotes, and their associated tasks for a particular category. This value is automatically calculated by Work Management, and cannot be edited.
Tips	Free-form text field that allows you to enter basic tips on solving Incidents, Changes Tasks, and Requests for a category. The **Tips** text box, visible at the bottom of the screen, contains applicable information unique to each attribute.
Satisfaction	Values that are used to calculate the overall customer satisfaction for the Help Desk and can be defined for each category. For more information, see *Viewing and Defining Satisfaction for Categories* on page 91. Satisfaction can be accessed by clicking the **Satisfaction** button near the top of the window

Navigating

Use the following information to navigate through the category record:

- Resize columns by positioning the cursor on the divider and sliding the divider to the right size. Click the **OK** button to save these changes.
- Use the **Tab** key to move through the entire range of buttons in the panel, and then to move the focus to the first cell of the spreadsheet.
- The Arrow keys are used to move through the cells.
- Use the **Enter** key to move between cells in each row.
- Use the Up, Down, Left, and Right **Arrow** keys to move within the spreadsheet.

- Double-clicking one of the cells in the **Outstanding count** field will open the *Incident/change* dialog box. The incomplete Incidents tickets, Change requests, Request quotes, and their associated tasks for that category are displayed in order of ascending item number. This includes items that have not yet been allocated. Only Incidents tickets, Change requests, Request quotes, and their associated tasks belonging to the manager logged in are displayed. On exiting the dialog box, you return to the same row in the Category spreadsheet.
- Click **OK** to save any changes made to the database during the session.
- Click **Cancel** to ignore any changes.

Keyboard Shortcuts

The following are some helpful keyboard shortcuts that you can use to navigate through the Category record:

- Ctrl+End moves the cursor to the last cell at bottom of the list.
- Ctrl+Home highlights the Name cell of the first record in the list.
- The Home key highlights the Name cell of the current row.
- The End key highlights the Outstanding count cell of the current row.

Adding New Categories

The following sections provide information on introducing new categories into both ServiceCenter and Work Management.

Note: Work Management displays data that exists in the ServiceCenter database. New categories, therefore, must be added from ServiceCenter.

ServiceCenter Actions

The key point to remember when adding Incident categories for Work Management is that Work Management should not receive all Incidents tickets, Change requests, Request quotes, and their associated tasks and all associated categories. Work Management organizes the scheduling and completion of software support issues rather than facilities issues, for example. For this reason, you should create an assignment group for Work

Management. For more information, see *Adding Assignment Groups* on page 121. All operators who will be using Work Management and any Incident categories that need to appear in Work Management must be directed to this assignment group.

Note: Changes, Tasks, and Requests appear in Work Management based on the manager to which they are assigned in ServiceCenter, not their category. The category of the change, task, or request is automatically recognized in Work Management, based on the category definition provided in ServiceCenter.

Incident Categories

To add a new Incident category:

1 Click the **Incident Management** button from the Services tab on the ServiceCenter main menu shown in Figure 2-1 on page 23. The Incident Management application tabs appear.

2 Click the **Security Files** button on the Incident Management Menu tab shown in Figure 4-2.

Figure 4-2: Incident Management Menu

The **Security Files** and **Environment** tabs appear.
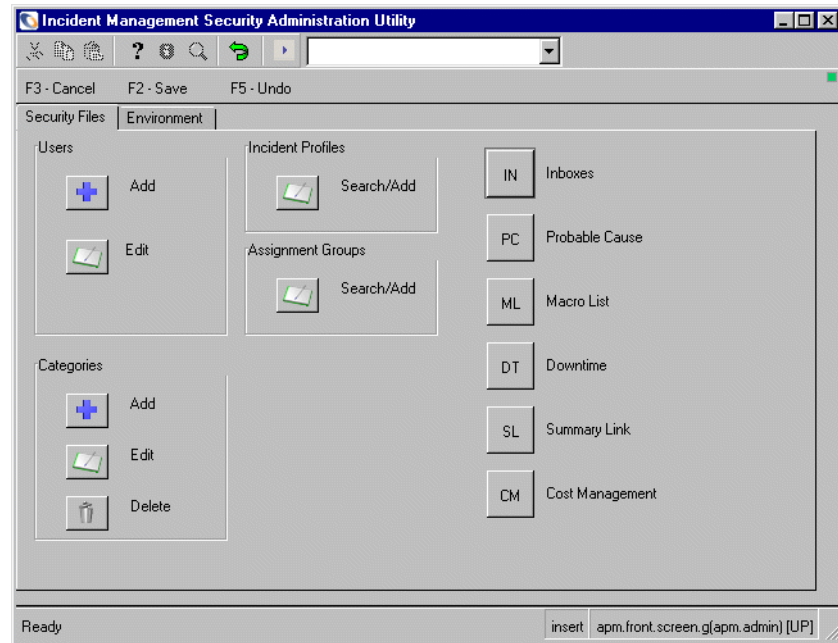
Figure 4-3: Security Files Tab

3 Click the **Add** button in the *Categories* section of the Securities Files tab.

4 Enter the name of the new category in the dialog which appears, for this example, enter WMexample.

5 Click **OK**.

Another prompt appears asking if this category profile should be based on the profile of an existing category.

6 If you want to base this category on another, Click the arrow button to the right of the field, then select a category from the drop-down menu. Click **Yes** to confirm the base action. If you do not want to base this category on another, click **No**.

Note: An **Active Notes** dialog box may appear after you click **No** with the message *The incident.WMexample.g format was created.* Click **OK**.
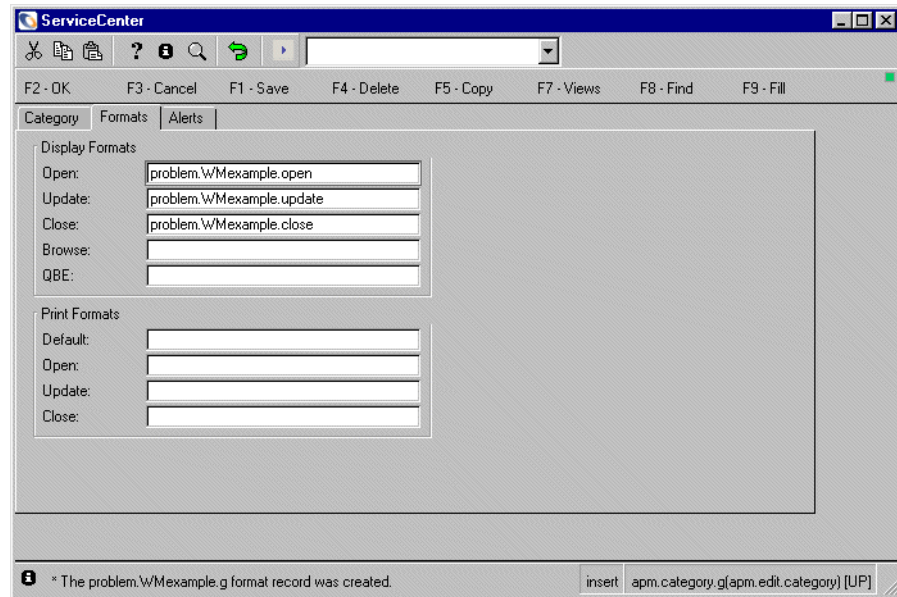

Figure 4-4: New Category

The configuration for the new category is displayed with a message at the bottom indicating the record has been added to the database.

7 Add an assignment group to the **Assignment Group Name** field to direct all tickets of this category to the assignment group monitored by Work Management.

8 Click the *Formats* tab.

Two groups of forms are detailed on this tab:

- The forms used to display open, update, close, and browse tickets of this category are listed. If a specific form is not listed, the default form for categories is used.

- The forms used to print opened, updated, closed, tickets of this category are listed. If a specific form is not listed, the default form for categories is used.

Figure 4-5: New Category Form

  9   Click **Save** to record your additions.

10   Click **OK** to return to the *Security Files* tabs.

11   Click **Back** twice to return to the main ServiceCenter menu.

12   Click the **Work Management** button.

Change and Task Categories

To add new change and task categories:

1 Click the **Change Management** button from the Services tab on the ServiceCenter main menu shown in Figure 2-1 on page 23. The Change Management application tabs shown in Figure 4-6 appear.

Figure 4-6: Change Management Menu — Changes Tab

2 Do one of the following:

- Depending on the type of category you are adding, click the **Change Categories** button on the Changes tab.
- Click the **Task Categories** button on the Tasks tab.

The category form appears.

3 Enter a category name and provide a brief description.

4 Make the **Availability** value *true* if this category is to be available for all users.

5 Provide at least one phase in the Phase array. Phases are listed in a drop down menu accessed from each array field.

6 Click New to record the category definition.

Figure 4-7: New Change Category Record

7 Click **OK** to exit the form.

8 Click **Back** to return to the *Change Management* tabs.

9 Click **Back** to return to the main ServiceCenter menu.

10 Click the **Work Management** button.

Request Quote Categories

To add new request categories:

1 Click the **Request Management** button from the Services tab on the ServiceCenter main menu shown in Figure 2-1 on page 23. The Request Management application tabs shown in Figure 4-8 appear.
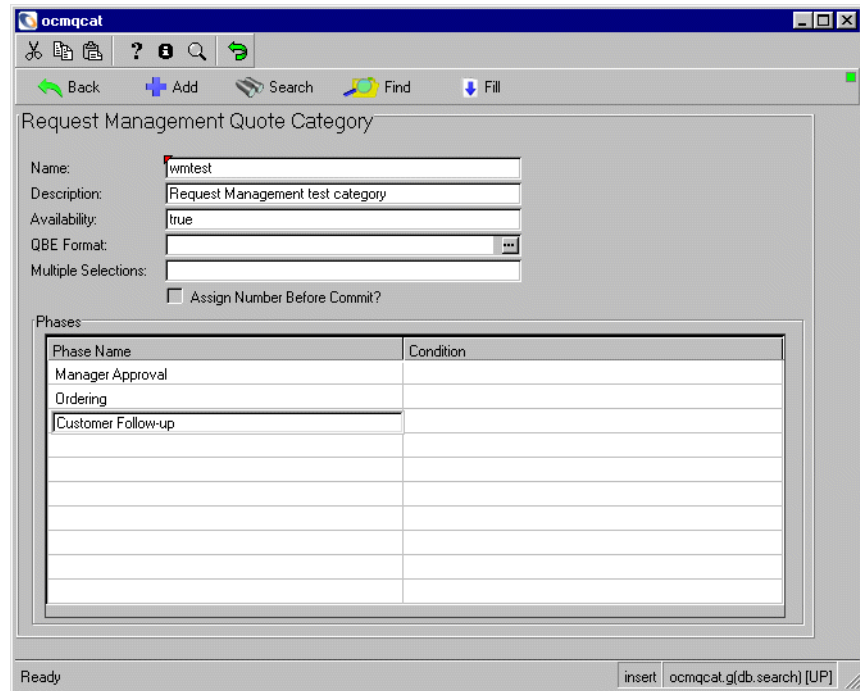

Figure 4-8: Request Management — Quotes Tab

2 Click the **Quote Categories** button on the Quotes tab.

An empty category form (**ocmqcat.g**) appears.

3 Enter a category name and provide a brief description.

4 Make the **Availability** value *true* if this category is to be available for all users.

5 Provide at least one phase in the Phase array.

Figure 4-9: Request Category Phases

6 Click **Add** to record the category definition.

7 Click **OK** to exit the form.

8 Click **Back** to return to the Request Management tabs.

9 Click **Back** to return to the main ServiceCenter menu.

Work Management Actions

The Work Management side of adding new categories is to verify that new categories appear in the system. Most of the creating and editing of category information is done in ServiceCenter.

To verify that a new category has been added:

1 Login to Work Management.

2 Select **View** > **Category….**

The Work Management Category table appears, listing the Incident, Change, Request, and Task categories separated into sections based on type.

Figure 4-10: Category List

Note: You may need to scroll down the list to see all of the categories you added.

The following conditions are stated in each new category:

- The Duration field value defaults to one hour (00:01:00)
- The Priority field value defaults to *10*.

Customizing Categories

To change the Duration or Priority values:

1 Select the cell and type in the new value.

   Note: Duration values must be in the format *d:hh:mm*. Priority values must be between 1 and 10.

   - Actual Duration is calculated by the system and cannot be edited.
   - Work Management does not require that you input a number in the Downtime that increases priority column. However, you must enter a value to escalate outstanding Incidents tickets, Change requests, Request quotes, and their associated tasks. Categories without a Downtime value entered will not automatically escalate in Work Management.

2 To input a Downtime escalation value, type a numeric value in the cell using the format *d:hh:mm*.

   - The first two user-defined fields (Attribute 1 and Attribute 2) default to a value of None.
   - Type and Information (the other two user-defined fields) values are imported directly from the ServiceCenter Category records.
   - Outstanding count values are automatically updated by the system and cannot be edited.

3 Click **OK** to save any changes to the database.

4 Click **Cancel** to ignore changes made.

   Note: If Incident, Change, Request, or Task record tickets already exist on the schedule, a warning prompt will ask if you want to apply the new category settings to these items. Click **Yes** to apply the changes.

Once the changes have been saved, Work Management automatically re-sorts the categories alphabetically and by type to include any new entries.

Adding/Editing Tips values

To enter new Tips for a category, or to edit existing Tips:

1 Select a category in the spreadsheet.

Any tips corresponding to that category are presented in the Tips field at the bottom of the window.

2 Use the Tab key to move from the category in the spreadsheet to the Tips field.

Tips is a free-form text field, allowing you to use the Up, Down, Left and Right arrow keys to navigate through the displayed field.

3 Make the required changes.

4 Click **OK** to save any changes to the database.

5 Click **Cancel** to ignore changes made.

Deleting Categories

Categories do not reside in Work Management; therefore, you need to go into ServiceCenter to delete a category.

Incident Categories

To delete an Incident category from the database:

1 Click the **Incident Management** button from the Services tab on the main ServiceCenter menu shown in Figure 2-1 on page 23. The Incident Management application tabs appear.

2 Click the **Security Files** button on the Incident Management Menu tab shown in Figure 4-2 on page 70. The Security Files and Environment tabs appear.

3 Click the **Delete** button in the *Categories* section of the Securities Files tab. A dialog box prompts you for the name of the category to delete.

4 Type the category name.

5 Click **OK**.

6 From the confirmation screen, select the associated forms that also need to be deleted. These forms display tickets for the selected category.
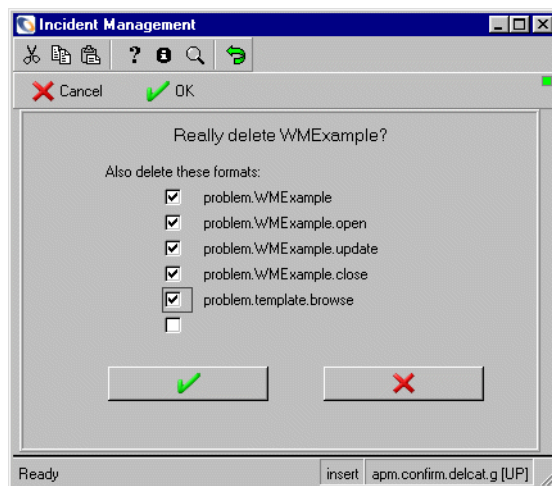
Figure 4-11: Removing Incident Category Forms

7 Click **OK** to confirm the delete action along with the associated forms.

You are returned to the Security Files tab, which has a message at the bottom of the screen indicating the selected record has been deleted from the category file.

Change and Task Categories

To Delete change and task categories:

1 Click the **Change Management** button from the Services tab on the ServiceCenter main menu, as shown in Figure 2-1 on page 23. The Change Management application tabs appear.

2 Do one of the following:
- Depending on the type of category you are adding, click the **Change Categories** button on the Changes tab, as shown in Figure 4-6 on page 74.
- Click the **Task Categories** button on the Tasks tab.

The category form appears.

3 Enter the name of the category and press **Enter**, or leave all fields blank and click **Search** to perform a true query and retrieve a list of all categories. If you are presented with a QBE list, select the desired item from the list. Figure 4-12 shows the category record.
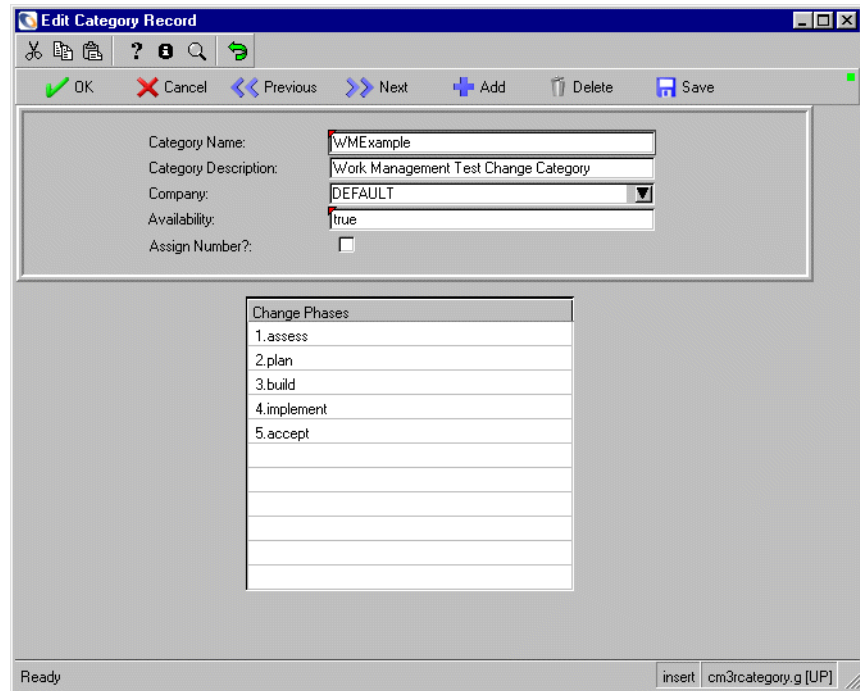
Figure 4-12: ServiceCenter Change Record

4 Click **Delete** from the system tray to initiate the record delete process. A new set of buttons appear in the system tray.

5 Select **Delete All** to remove all pieces of this category.

A new screen displays all remaining pieces of the category.

Figure 4-13: Confirm Change Category Delete

6 Click **Delete** to remove the name and all associated elements in ServiceCenter. You are returned to a QBE list of existing categories with a confirmation message at the bottom of the screen.

Request Categories

To delete request categories:

1 Click the **Request Management** button from the Services tab on the ServiceCenter main menu. The Request Management application tabs appear.

2 Click the **Quote Categories** button on the Quotes tab, as shown in Figure 4-8 on page 76. An empty category form (**ocmqcat.g**) appears.
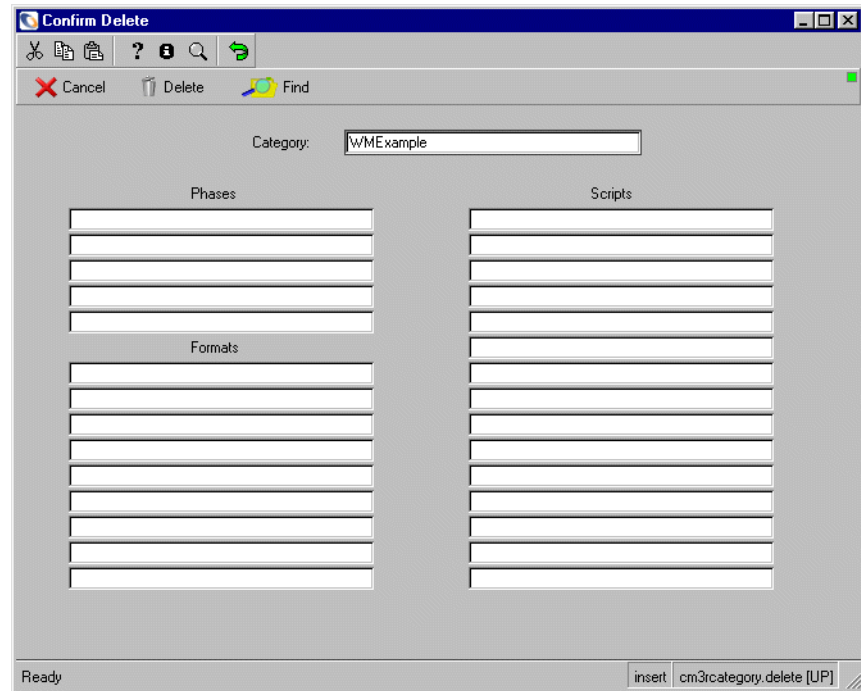
3 Enter the name of the category and press **Enter**, or leave all fields blank and click **Search** to perform a *true* query and retrieve a list of all categories. If you are presented with a record list, select the desired item from the list.

Figure 4-14: ServiceCenter Quote Category Record

4 Click **Delete** from the system tray to initiate the record delete process.

5 A warning prompt appears, asking if you actually want to remove this category, click **Yes** to confirm the deletion, or **No** to cancel the action.

When the category record is deleted, a message appears at the bottom of the screen indicating it has been removed from the quote category file, and you are returned to the following record in the record list.

Editing Categories

Editing from Work Management

Not all Work Management category fields can be edited in Work Management. Duration, Priority, and Downtime That Increases Priority are the only fields that the user can edit from Work Management. The Actual Duration and Outstanding Count fields are calculated by the system. The user-defined fields contain data imported from ServiceCenter or have non-editable default values.

Note: **Press F2** or *single-click* to enter edit mode on those cells which can be edited in Work Management. Once a cell is highlighted for edit mode, enter any new values, then click the **right mouse button** to bring up a shortcut menu. Use the **refresh** option to update the display with the edited cell values.

To edit categories:

1 Select the entire contents of the cell by double-clicking the displayed field value. Use the **Cancel** button to ignore your most recent change.

The following conditions are stated in each new category:

- The Duration field value defaults to one hour (00:01:00)
- The Priority field value defaults to 10.

2 To change the Duration or Priority value, select the cell and begin typing in the new value.

Note: Duration values must be in the format *days:hours:minutes.* And Priority values must be between 1 and 10.

- Actual Duration is calculated by the system and cannot be edited.

Work Management does not require that you input a number in the Downtime that increases priority column. However, you must enter a value to escalate outstanding Incidents. Categories without a Downtime value entered will not automatically escalate in Work Management.

3 To input a Downtime value, type a numeric value in the cell using the format *days:hours:minutes.*

4 Edit user-defined field values:

- The first two user-defined fields (Attribute 1 and Attribute 2) default to a value of *None*.

- Type and Information (the other two user-defined fields) values are imported directly from the ServiceCenter Category record.
- Outstanding count values are automatically updated by the system and cannot be edited.

5 Click **OK** to save any changes to the database.

6 Click **Cancel** to ignore changes made.

Once the changes have been saved, Work Management automatically re-sorts the categories alphabetically by Name to include the new entry.

Categories may be modified or new ones added by other managers. Using the Refresh button at the top of the window will update the Category record dialog with the latest data from the database.

To enter new Tips for a category, or edit existing Tips, see *Adding/Editing Tips values* on page 80.

Editing from ServiceCenter

Incident Categories

To edit an Incident category:

1 Click the **Incident Management** button on the Services tab on the main ServiceCenter menu. The Incident Management tabs appear.

2 Click the **Security Files** button on the Incident Management Menu tab shown in Figure 4-2 on page 70. The Security Files and Environment tabs appear.

3 Click **Edit** in the *Categories* section of the Securities Files tab shown in Figure 4-2 on page 70. A dialog box prompts you for the name of the category to edit.

4 Type the category name.

5 Click **OK.**

The category form appears displaying the features of the category you have selected.
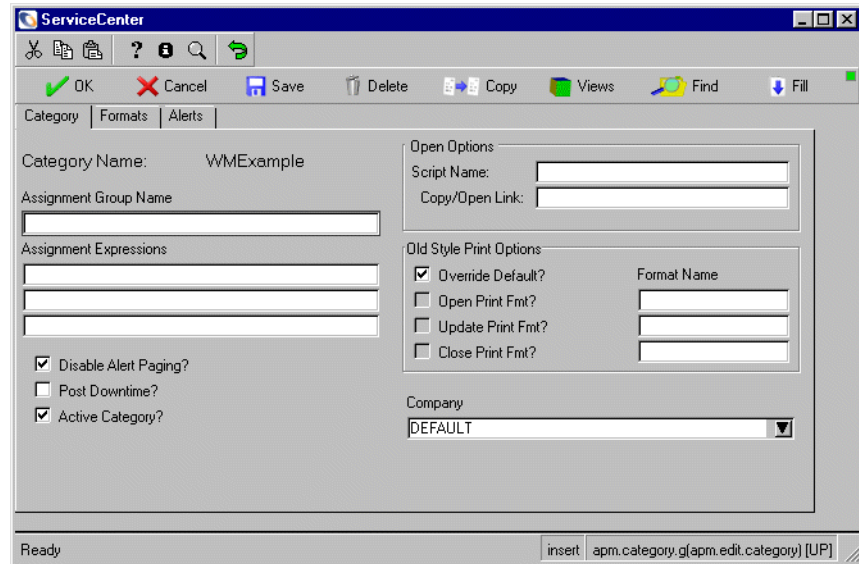
Figure 4-15: Editing a ServiceCenter Incident Category

6 Click the Category, Formats, and Alerts tabs to view and modify various aspects of the category configuration. Modifications to this record will affect how it is processed both in ServiceCenter and Work Management.

7 Click **Save** after making edits, to record and update the record in the database.

Change and Task Categories

To update and edit change and task categories:

1 Click the **Change Management** button from the Services tab on the ServiceCenter main menu.

The Change Management application tabs appear.

2 Do one of the following:

- Depending on the type of category you are adding, click the **Change Categories** button on the Changes tab shown in Figure 4-6 on page 74.
- Click the **Task Categories** button on the Tasks tab.

The category form appears.

3 Enter the name of the category and press **Enter**, or leave all fields blank and click **Search** to perform a true query and retrieve a list of all categories.

4 If you are presented with a QBE list, select the desired item from the list.

The category record is displayed.

Figure 4-16: Updating ServiceCenter Change Category Record

5 Modify the various aspects of the category configuration.

Modifications to this record will affect how it is processed both in ServiceCenter and Work Management.

6 Select **Save** when finished modifying the record to commit your changes to the database.

Request Categories

To update and edit request categories:

1 Click the **Request Management** button from the Services tab on the ServiceCenter main menu. The Request Management application tabs appear.

2 Click the **Quote Categories** button on the Quotes tab shown in Figure 4-8 on page 76. An empty category form (**ocmqcat.g**) appears.

3 Do one of the following:

- Type the name of the category and press **Enter.** Figure 4-17 shows a Request Management Quote Category record.

- Click **Search** to perform a *true* query and retrieve a list of all categories. Select the desired item from the list.

Figure 4-17: Request Management Quote Category Record

4 Modify the various aspects of the category configuration. Modifications to this record will affect how it is processed both in ServiceCenter and Work Management.

5 Select **Save** when finished modifying the record to commit your changes to the database.

Refreshing list of Categories in Work Management

All modifications of and additions made to Category records while in ServiceCenter are eventually displayed in Work Management.

Work Management refreshes periodically on its own; however you can also manually refresh the listings.

At the top of the Category screen is a Refresh button. Clicking this button updates your list of categories with any new information captured by Work Management, including the creation or modification of a category by another user. Using refresh also updates the display with the latest number of outstanding Incidents tickets, Change requests, Request quotes, and their associated tasks for each category.

To refresh a list:

▶ Click **Refresh** at the top of the Category screen. Your category information is automatically updated to the latest changes in the Work Management database. For more information, see *Category List* on page 78.

Updating Duration

As Incidents tickets, Change requests, Request quotes, and their associated tasks are completed for a particular category, Work Management tracks the actual amount of time used by the Help Desk operators. This information is presented in the Actual duration column of the Category screen. You can use the Actual duration column to update the values in the Duration column. However, this option will not be available when the actual duration column is blank for a particular category.

To update with latest Actual duration information:

1 Click **Recalculate** at the top of the Category screen. From the keyboard, access the range of buttons by using the **Tab** key.

This action calculates the actual duration based on the completed Incidents tickets, Change requests, Request quotes, and their associated tasks over a known period of time. For more information, see *Creating Custom Configurations* on page 173 and see *Category List* on page 78.

2 Click **OK** to save the newly calculated actual duration. These same values are displayed until the next recalculation.

Note: At this time, the user-access is not enabled to replace Duration values with Actual duration values.

Viewing and Defining Satisfaction for Categories

For each category, you can define a penalty when an Incident is not resolved within a specific time frame. This is a way to identify and uphold a service contract. You can determine the amount of downtime that affects the satisfaction of your contacts, as well as the rate at which satisfaction decreases. This measure of performance is used to calculate the overall customer satisfaction for all outstanding Incidents tickets, Change requests, Request quotes, and their associated tasks.

Your satisfaction scores are presented on the Satisfaction gauge of the Category window. The Satisfaction gauge is accurate *only* when satisfaction is defined for *all* categories. Any category without a satisfaction definition automatically defaults to 10, the highest rating. Since the Satisfaction gauge describes the average calculation for *all* of the categories in the system, categories that default to *10* will influence those that do have satisfaction defined.

To view or edit the satisfaction associated with a particular category:

▶ Click **Satisfaction** at the top of the Category screen. If extreme data points are specified, the intermediate values are interpolated. For more information, see *Category List* on page 78.

Satisfaction is calculated by Work Management from two attributes: score and downtime.

| Attribute	Definition
Score	A value between 0 and 10. A score of *10* indicates the highest possible satisfaction, while a score of *0* is the lowest.
Downtime	Expressed in the format *days:hours:minutes*, downtime is associated with each score. Based on the downtime entered for each score, Work Management builds a line graph where the Y-axis is downtime expressed in hours, and the X-axis is the score. A minimum of 2 points *must* be entered for the satisfaction curve to be generated. If no satisfaction is defined, the system default is 10.

Figure 4-18 shows a satisfaction time graph.
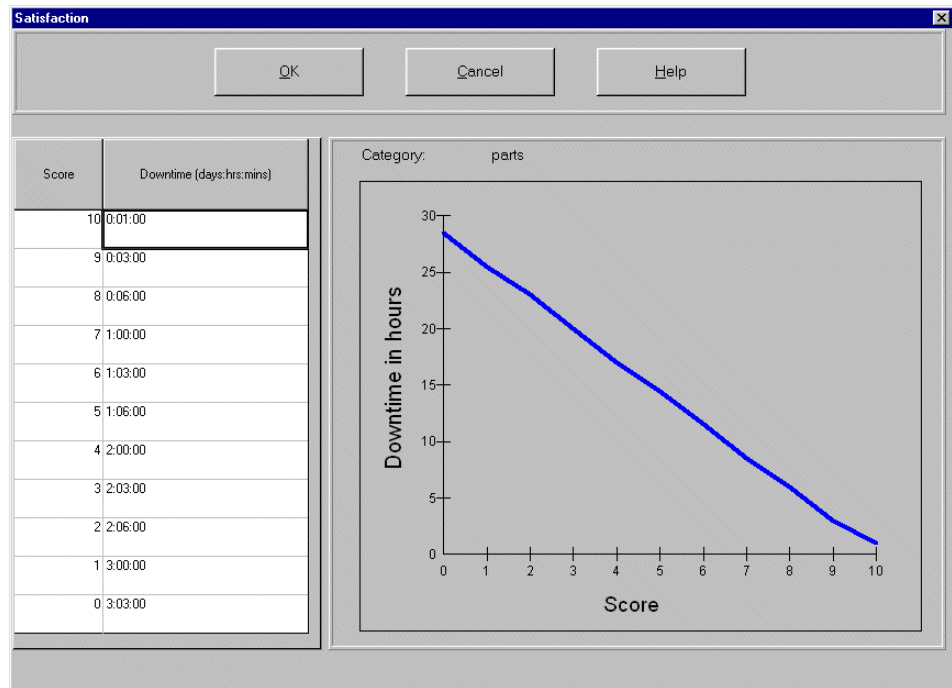
Figure 4-18: Satisfaction Time Graph

Updating Satisfaction Values

To enter the downtime for each of the scores:

1 Highlight the desired cell.

2 Type in the appropriate value.

Downtime must be expressed in terms of *days:hours:minutes.* Increasing downtimes should correspond to lower scores.
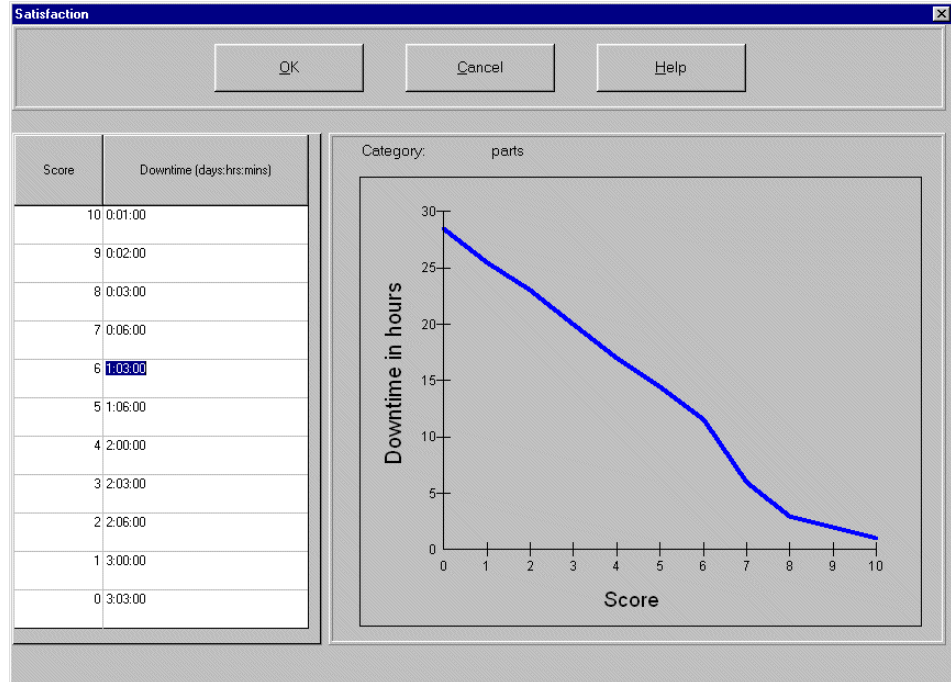
Figure 4-19: Customizing Satisfaction Values

The Downtime in hours graph displays the satisfaction curve relating increasing downtime to a decreasing satisfaction score. As you key in satisfaction values in the table, Work Management updates the satisfaction curve to reflect your entries.

3 Click **OK** to save your changes or click **Cancel** to ignore changes.

5 Operators and Managers

CHAPTER

This chapter is an introduction to using Operators and Managers in Work Management for the ServiceCenter administrator, manager, or user. It describes how to establish system operators, including managers and group managers, and describes how to tie these operations to other elements in the ServiceCenter database.

Read this chapter for more information about:

Viewing and Editing Operator Information

Work Management retains a log of all ServiceCenter operators registered to the Help Desk assignment group, complete with their individual areas of expertise and times of availability. This information is used to generate a schedule that takes the particular skill sets and availability of the operators into account. Each manager can update the areas of expertise for those operators assigned to him/her directly in Work Management.

New operators must be created in ServiceCenter and assigned to the Help Desk (For Example, the Work Management assignment group) before they can appear in Work Management. When created, an operator is automatically assigned to the manager of that assignment group.

To view or edit operator information:

1 Do one of the following:

- From the **View** menu, select **Operator.**
- Double-click the operator column in the Schedule window.

The list of operators appears.

This list of operators includes only those operators that have been assigned to the individual manager logged into Work Management.

The attributes defined for each operator include Name, Login, Password, Outstanding count, Expertise (in button bar) and the user-defined fields (*Attribute 1*, *Attribute 2*, *Voice Mail* and *Beeper*).

Figure 5-1: Work Management Operator Details

Field	Definition
Name	Identifies an operator within an organization. The name must be unique for each operator. All operators are sorted alphabetically by name. You can enter first names first or last names first. Work Management sorts the operators by the first letter of the first word in the name. For example, if you were to enter an operator as *Jones, Henry*, the name is sorted by *J*. If you enter the same contact as *Henry Jones*, the name is sorted by *H*.
Login	Defines the login ID for the operator when logging into Work Management. The value of this field must be unique for each operator.
User-defined Fields	Used for reporting only, the user-defined fields are not validated against any list of data values. Labeled as *Attribute 1, Attribute 2, Voice Mail* and *Beeper.* These fields can be modified from the User Defined fields... option in the Options pull-down menu on the Schedule window. For more information, see *Schedule Window* on page 127.

Field	Definition
Outstanding count	Indicates the number of open tickets assigned to each operator. This value is automatically computed by the system and cannot be edited.
Expertise (Click the button at top of window to reveal this item.)	Identifies which categories an operator is qualified to resolve. You may select any number of ServiceCenter or Work Management defined categories. To schedule Incidents tickets, Change requests, Request quotes, and their associated tasks, each operator *must* have defined areas in the Expertise column. If no values are entered for Expertise, the Auto Scheduler task is unable to assign any Incident ticket to that operator. In the instance where no operators have the expertise to complete a given item, Work Management holds the item in the Mailbox as unallocated assignments. However, the Manager can drag and drop such Incidents tickets, Change requests, Request quotes, and their associated tasks to any Operator even if the operator does not have the expertise.

Navigating

Use the following information to navigate through the Operator record:

- Resize columns by positioning the cursor on the divider, and sliding the divider to the right size. Click the **OK** button to save these changes.
- Use the **Tab** key to navigate through the entire range of buttons in the panel and then move to the first cell of the spreadsheet.Use the arrow keys to navigate within the spreadsheet.
- Use the **Enter** key to move between cells in each row.
- Use the Up, Down, Left, and Right **Arrow** keys to move within the spreadsheet.
- Click **OK** to save any changes made to the database during the session.
- Click **Cancel** to ignore any changes.

- Double-click a cell value in the **Outstanding count** field to open the *Incident/Change Details* dialog box. Incomplete Incidents tickets, Change requests, Request quotes, and their associated tasks for that operator are displayed in the ascending order of item numbers. This includes Incidents tickets, Change requests, Request quotes, and their associated tasks that have not yet been allocated. Only Incidents tickets, Change requests, Request quotes, and their associated tasks belonging to the manager logged in will be displayed. On exiting the dialog box, you return to the same row in the Operator spreadsheet.

Keyboard Shortcuts

The following are some helpful keyboard shortcuts that you can use to navigate through the Operator record:

- Ctrl+End moves the cursor to the last cell of the list.
- Ctrl+Home highlights the Name cell of the first record in the list.
- The Home key highlights the Name cell of the current row.
- The End key highlights the Outstanding Count cell of the current row.

Adding Operators and Managers

New operators originate in ServiceCenter. Operator names, logins and passwords defined in ServiceCenter are used by Work Management. See the *System Administrator's Guide* for information on how to do the following steps in ServiceCenter.

In the operator record:

1 Set up an operator record for the user or manager.

2 In user's operator record, select type of resource this operator is.

3 Select which profiles or user roles the operator will use.

4 Enter operator's name in an assignment group if one was not already assigned.

Work Management Actions

The operator has to be created and configured in ServiceCenter, but the operator will not appear in Work Management until you refresh the session, or log in as that operator or manager.

To refresh the session:

1 From the Schedule window, pull down the **Schedule** menu.

2 Do one of the following:

- Select the **Refresh** *All* option.
- Press **Ctrl+R**. The new operator(s) appear in the Schedule window in alphabetical order according to the first letter of the name.

For more information, see *Viewing and Editing Operator Information* on page 96.

Note: For tickets assigned to a new manager to appear you need to switch to that manager's login. For more information, see *Logging in as a Manager* on page 26.

Defining Managers

Work Management uses the user profiles established in ServiceCenter for operators and managers. This means a user must be defined as a manager or group manager from within ServiceCenter before that user can be recognized as a manager in Work Management.

Note: To create a new user and make that user a manager, see the *System Tailoring* and the *System Administrator's Guide* .

To make an existing user a manager in ServiceCenter:

1 Start and login to ServiceCenter from desktop.

2 Select the Utilities tab.

3 Click the **Administration** button.

4 Select the **Operators** button under the *Security* group.

5 Enter the name of the operator to modify and press **Enter**, or leave all fields empty and press **Enter** to list all available users. If a QBE list of users appears, highlight a user name in the list, using the cursor and press **Enter**. Figure 5-2 shows the operator record.
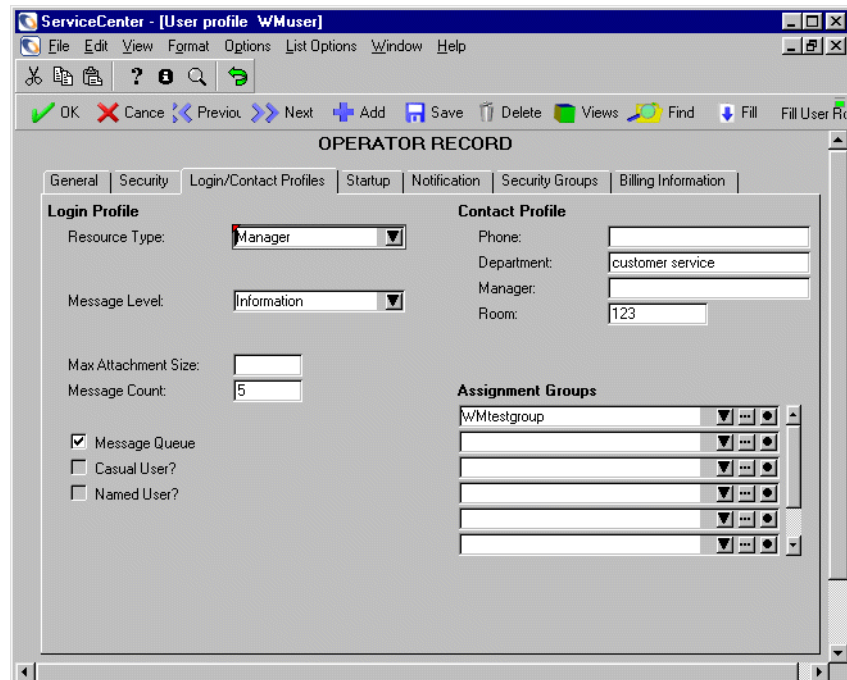

Figure 5-2: Operator Record — Login/Contact Profiles Tab

6 Select the **Login/Contact Profiles** tab.

7 Click the drop-down arrow beside the **Resource Type** field.

8 From the displayed list of resource type options, select **Manager** or **Group Manager**.

Note: If this operator is to be a group manager, a profile record containing those managers this operator will supervise needs to be created, with the group manager listed as the manager of that group.

9 Click the **Save** button to record this change.

10 Click Back to return to the main ServiceCenter menu.

Assigning Resources to a Manager

Once a manager is defined as such on his/her operator record, the operator must also be defined as the manager of a specific assignment group. The manager's login must appear in the Manager Name field of an assignment group to become recognized as a manager by Work Management.

To add a managers name to a specific assignment group:

1 Click the **Incident Management** button from the Services tab on the main ServiceCenter menu. For more information, see Figure 2-1 on page 23. The Incident Management application tabs appear.

2 Click the **Security Files** button on the Incident Management Menu tab.

3 Click **Search/Add** under Assignment Groups.

4 Type in the name of the new Assignment Group and click **Add**. Figure 5-3 shows the new profile.
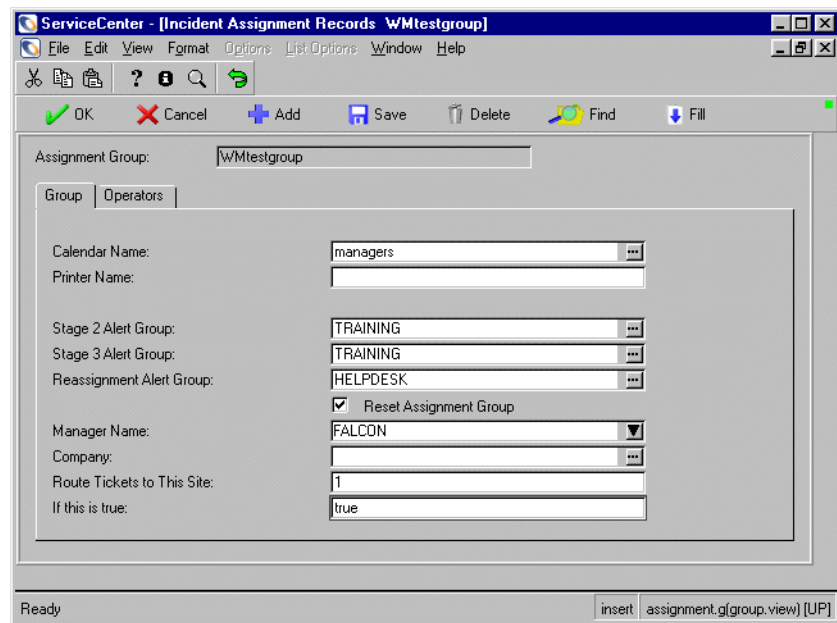
Figure 5-3: New Assignment Group

5   If the shift information for this group differs from the group upon which you based this record, select a different value for the **Calendar Name** field. Otherwise leave the field value as it appears.

6   Enter the manager name in the **Manager Name** field, or select the arrow (Fill) button and select the name from the user list

If this is to be a group of managers, select an operator whose operator record identifies him as a *Group Manager* in the **Manager Name** field.

7   Select the *Operators* tab.

Figure 5-4: Configuring an Assignment Group

8   Enter the names of the operators or managers who are in the group under this manager.

9   Click **Save**.

You are returned to the *Security Files* tab.

10   Click **Back** to exit.

Logging in as a Manager in Work Management

To see the tickets assigned to this manager's group, you need to switch to the manager's login. For more information, see *Logging in as a Manager* on page 26.

To switch to another login:

1 Start Work Management, described in *Getting Started* on page 19.

2 Login as the manager created in *Defining Managers* on page 100. If you logged in as a Resource manager, the Schedule window appears immediately, displaying the list of operators assigned to that manager and the Incidents assigned to those operators.

3 If you logged in as a Group manager, a Manager List dialog box displays the list of subordinate managers. Click a name from the list.

4 Click the **OK** button to display the operator schedule beneath that manager, as shown in Figure 5-5.
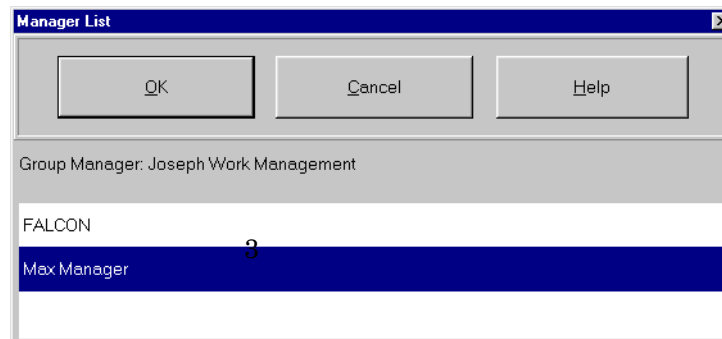

Figure 5-5: Group Manager List of Managers

Editing Operators in Work Management

Press **F2** to switch to edit mode on those cells that can be edited with Work Management. To access the contents of the combo boxes, click the arrow button beside the field, and use the direction keys to select from the list. Figure 5-6 shows the Operator Details record.

Figure 5-6: Work Management Operator Details

To edit and operator record:

1 Select the entire contents of the cell by *double-clicking* the displayed field value.

2 Use **Cancel** to cancel your most recent editing changes.

The following list explains the edit capabilities for each column:

- Name is retrieved from the ServiceCenter operator record and is non-editable from Work Management.

- Login is retrieved from the ServiceCenter operator record and is non-editable from Work Management.

- Attribute 1 and Attribute 2 are user-defined fields. To modify these use the combo box buttons to the right of the cells. The default value is None and the menu contains no options unless Work Management is configured to do so.

- Voice mail is retrieved from the ServiceCenter operator record and is non-editable from Work Management.

- Beeper is retrieved from the ServiceCenter operator record and is non-editable from Work Management.

- Outstanding count is updated automatically and cannot be edited.

- Operator Expertise (accessed via the Expertise button) is defined from the Expertise screen. For more information, see *Assigning Expertise Information to an Operator* on page 108.

3 After making changes, click **OK** to save the modified information to the database. Click **Cancel** to ignore the changes.

Deleting Operators

Operators are managed in ServiceCenter and are picked up by Work Management; therefore, operators must be deleted in ServiceCenter.

To delete an operator:

1 With the operator record open, open the ServiceCenter **Options** menu.

2 Select **Completely Remove User**.

3 A prompt will appear confirming that you want to delete the user and all related groups and profiles. Click **Yes** to proceed, or click **No** to exit the dialog box without removing the record.

> **Important:** This will remove the users relationship to any profiles, all CM message groups, assignment groups, and deletes any personal inboxes. This user will no longer be able to access ServiceCenter.

After everything has been deleted, you will be returned to the previous menu.

Refreshing Operator list

At the top of the Operator dialog box is a Refresh button. This button is used to refresh your list of operators with any new information captured by Work Management, such as the creation or modification of operator information by another user. Using refresh will also update the Operator column with the latest number of outstanding Incidents tickets, Change requests, Request quotes, and their associated tasks for each operator.

To update the list:

▶ Click the **Refresh** button at the top of the Operator dialog box. This automatically updates your operator information to be current with the latest changes in the Work Management database. Figure 5-7 shows the Operator Details record.
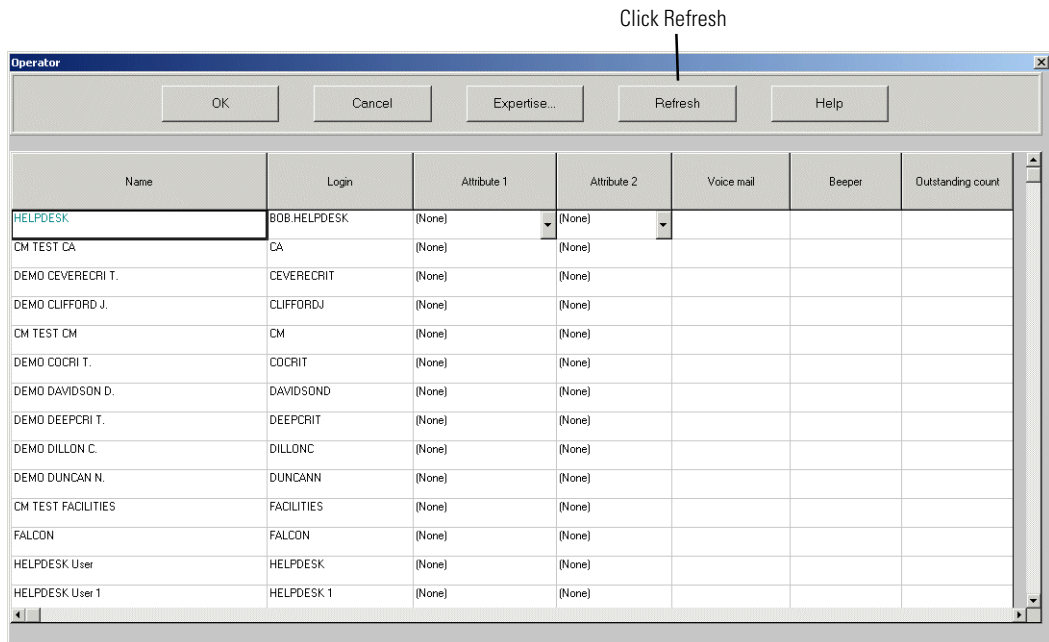
Click Refresh

Figure 5-7: Refreshing Work Management Operator Details

Sorting Operators

You can sort the operator list in the Operator pane alphabetically, or you can sort by primary or secondary resource.

Sort the operator list using the options on the Schedule tab of the Customize dialog. For more information, see *Operator (Sort) Order* on page 183.

Work Management Read Only View

Work Management allows a read only view of the scheduler for users who are not on the Help Desk team.

These users can only make changes to the Timescale, Customize and Filter dialogs. All other dialogs are read only.

Configuration

Read only view attributes are defined for a user in ServiceCenter using the wdlsReadOnlyView logical field located in the **operator** file. This field is not currently available on any default ServiceCenter operator form, but the field has been established in the **operator** file. The system administrator must add this field to a form using Forms Designer in order to use this option.

Once available, if this field is set to *true* for an operator, the user has a read only view when logging into Work Management. They cannot allocate, unallocate, drag or drop Incidents, Changes, Requests, or Tasks.

Assigning Expertise Information to an Operator

The Operator window displays the Expertise areas for the selected operator only. Three attributes describe Expertise for each operator. These attributes are *Category, Expertise level,* and *Hourly rate.*

Attribute	Definition
Category	Derived directly from the category database.
Expertise level	Indicates the extent of the operator's expertise in a particular category. This value is used to ensure that a contact's Minimum Expertise requirement is upheld during scheduling. Minimum Expertise will default to the lowest Expertise level defined in the system.
Hourly rate	Used to compute the cost of completing Incidents.

To assign Expertise information to an operator:

1 Double Click the Operator Name in the Schedule Panel. For this example, pick HELPDESK, BOB.

2 The Operator dialog box will be displayed, with that operator's name highlighted.

Figure 5-8: Assigning operator expertise

3 Click the **Expertise** button from the window header.

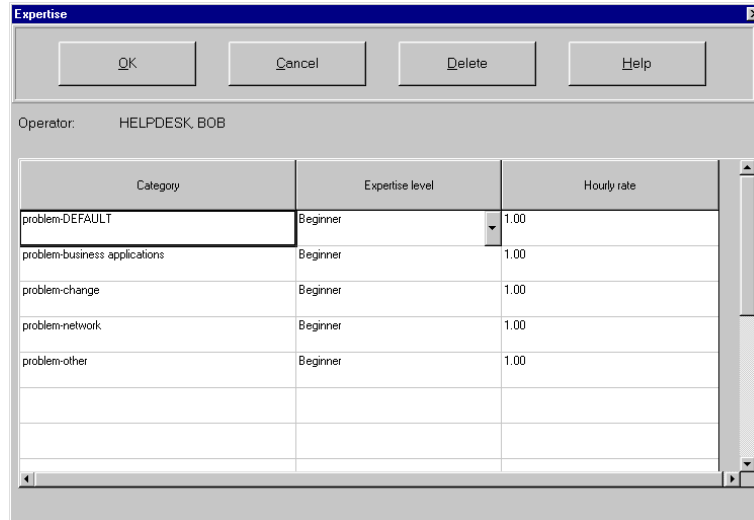The Expertise dialog box will be displayed.

Figure 5-9: The Expertise Dialog Box

4 Double-click an empty category cell to display the **Select Category** dialog box. Categories that have already been assigned to the operator are displayed in blue.
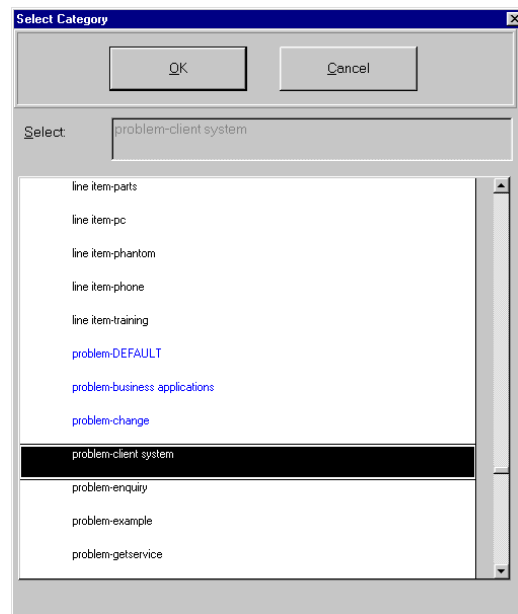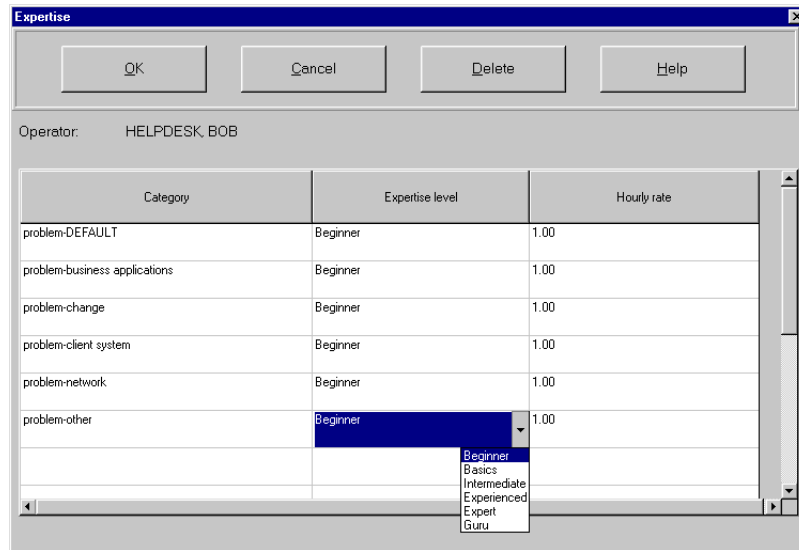

Figure 5-10: Selecting a Category of Expertise

5 Choose from the list of available categories by clicking with the mouse or by typing in the first few letters of the category name.

6 Click **OK** or press **Enter** to assign the new category to the operator.

7 Click **Cancel** to close the **Select Category** dialog box without assigning a new Expertise to the operator.

Figure 5-11: Selecting a Level of Expertise

8 On the **Expertise** screen, select the combo box to display a list of expertise options.

9 Select a value from the list to define the operator's Expertise level for the new category.

Work Management defaults to the lowest defined expertise level for all newly assigned categories, i.e., *Beginner*.

Hourly Rate

To change the Hourly rate:

1 Select the appropriate cell by clicking its contents.

2 Overwrite its contents with a new numeric value.

Figure 5-12: Assigning an Hourly Rate

Note: You do not need to include a dollar sign with the hourly rate.

3 To edit a portion of the value:

  a Double-click the cell.

  b Use the cursor to navigate.

  c Make edits to the value.

  If the Hourly rate cell is left blank, Work Management assigns a default rate of ($)*1.00.*

4 Click **OK** to save these changes to the database.

5 Click **Cancel** to ignore changes.

Deleting an Expertise

To delete an Expertise entry:

1 Highlight a cell in the appropriate row.

2 Click the **Delete** button.

3 You can also remove an Expertise by pressing the **Delete** key on the keyboard.

4 Click **OK** to save these changes to the database.

5 Click **Cancel** to ignore changes. Work Management allows you to save the changes to the schedule before proceeding with the deletion.

Defining Operator Commitment

Operators may not be available full-time to work on Incidents, Changes, Requests, or Tasks, due to vacations, internal meetings, or outside projects. Work Management tracks the availability of each operator, and uses that information when scheduling Help Desk tickets. Operator commitment can be added or modified from within Work Management. Managers can define operator commitment for only those operators assigned to them.

Viewing Operator Commitment

To view commitment information for an operator:

1 Click the appropriate operator name in the Schedule window.

2 Pull down the **View** menu.

3 Click the **Operator Commitment…** option.

Figure 5-13: Viewing Operator Commitment

The operator commitment record appears.

Figure 5-14: Operator Commitment Details

The following characteristics are used in the Operator Commitment record to define commitments.

Field	Definition
From date	The starting day of the period of commitment. The first six (6) letters are displayed on the commitment bar of the Schedule window.
To date	The ending day of the period of commitment. The first six (6) letters are displayed on the commitment bar of the Schedule window.
Weekday	The day out of the given period that the commitment is applicable.
From time	The starting time of the period of commitment.
To time	The ending time of the period of commitment.
Type	The type of commitment. The first six (6) letters are displayed on the commitment bar of the Schedule window.
Shared to	The manager the operator is shared with - only enabled for shared operators. To share an operator, select Shared in the Type column.
Notes	You may enter whatever additional information you want in the **Notes** field, which can be seen only in this screen.

Creating New Operator Commitment Information

To add new operator commitment information:

1 Select the appropriate operator.

2 Figure 5-15 on page 115 shows the Operator Commitment record. For more information, see *Viewing Operator Commitment* on page 113.

Figure 5-15: Viewing Operator Commitment Details

3 Use the *Down* arrow key, or the **Ctrl+End** keys to move to the last row of the record.

Note: Dates must be entered in the format defined in the Control Panel. In most cases, this will be in the format *mm/dd/yy*.

4 Click **OK** to save changes to the database.

5 Click **Cancel** to ignore changes.

6 Return to Schedule window. By default the system sets all new times entered under 12 to a value of AM. All times stated in military (24 hour clock) time, switch to the appropriate AM/PM time.

> **Important:** If you add commitments that conflict with assigned Incidents tickets, Change requests, Request quotes, and their associated tasks, Work Management does not update the schedule by pushing the assigned tickets back to the next point of availability for the operator. Instead, any overlap creates a new line of ticket bars for the operator. The manager must reschedule these items manually, or select the **Autoschedule** option from **Operations**.

Figure 5-16 shows a typical scheduling conflict.
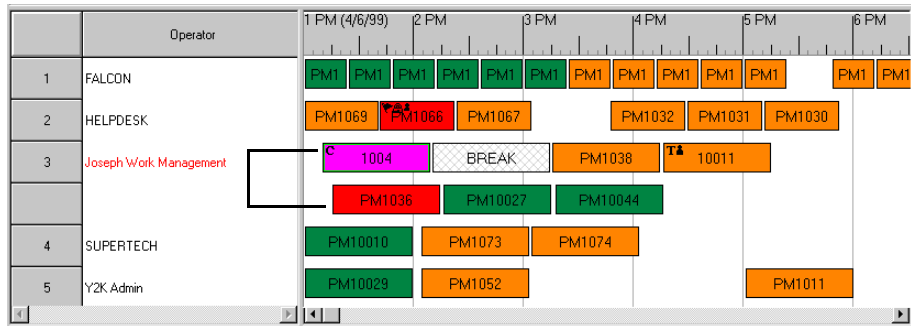
Figure 5-16: Scheduling Conflict — must reschedule to resolve

1 Perform necessary rescheduling, if conflicts arise.

2 Save schedule. For more information, see *Allocating Tasks Across Commitments* on page 167.

Editing Operator Commitment Information

To edit operator commitment information:

1 Select the cell you wish to edit.

2 Begin typing to overwrite the contents of the cell.

3 Do one of the following:

- *Double-click the* cell.
- Press **F2** to place you in edit mode.

4 Use the *Left* and *Right* arrow keys to move within the cell and make any changes. Use **Cancel** to ignore your most recent editing changes.

5 Enter the date range in the **From** and **To** date fields.

6 Select the **Weekday** from the drop down list.

7 Enter the time range in he **From** and **To** time fields.

8 Select the **Type** from the drop down list.

9 If you selected SHARED as the type, select the manager with whom the operator is shared from the from the **Share to** drop down list. For more information, see *Sharing An Operator with Another Manager* on page 117.

Deleting Operator Commitment

To delete operator commitment:

1 Select the row of commitment you wish to delete.

2 Click the **Delete** button, or use the **Delete** key on the keyboard.

3 Click **OK** to save the changes to the database. Click **Cancel** to ignore changes.

Sharing An Operator with Another Manager

To share an operator:

1 Select the appropriate operator at the **Operator Commitment** dialog box.

2 Specify the time period when the operator is shared, using the **From date** and **To date** fields.

3 Select the days in the week from the **Weekday** cell when the operator is shared.

4 Specify the time during the selected period when the operator is shared, using the **From time** and **To time** fields.

5 Selected the commitment type as SHARED.

6 Select the manager's name to whom the operator is lent to or shared with from the **Share to** list box.

7 Click **OK** to save the changes. Click **Cancel** to undo the changes. A row for the Secondary Manager name appears under the operator's name in the Schedule window. For more information, see *Allocating Tasks Across Commitments* on page 167.

6 Interpreting ServiceCenter Record Item Details

This chapter was designed to give the ServiceCenter administrator, manager, or user an introduction to ServiceCenter Records. It provides an introduction to the features of the Incident ticket, change task, and request quote; and their various views.

Topics in this chapter include:

Introduction

The attributes of Incidents tickets, Change requests, Request quotes, and their associated tasks in the Schedule window can be viewed and modified selecting **View** > **Schedule Details** from the Schedule window.

In addition to the information box shown in Figure 6-1, Work Management displays a dialog box showing more details about the ServiceCenter record items, such as Incidents tickets, Change requests, Request quotes, and their associated tasks. The information in this dialog box also corresponds to the details displayed in the *Spreadsheet* pane of the Schedule window. For more information, see *The Task Spreadsheet Pane* on page 39.

Using this dialog box, you can view and modify any Incident, Change, Request, or Task belonging to the manager or operator logged in.

Figure 6-1: Work Management Schedule Window Details

Posting ServiceCenter Records to Work Management

Each ServiceCenter system record to appear in Work Management needs to be specified as such, either by assigning it to a particular group or assigning it to a specific operator/manager. It is the manager's assignments that are displayed in the Schedule window. All items (Incidents tickets, Change requests, Request quotes, and their associated tasks) to be scheduled will be distributed by that manager through Work Management. You may use a out-of box assignment group, such as HELPDESK, or create your own.

Adding Assignment Groups

To create an Assignment Group:

1 Login to ServiceCenter.

2 Click Administration on the Utilities Tab on the ServiceCenter System Administrator Main Menu.

3 Click User Administration on the Information/Security/Insight tab.

4 Click Assignment Groups on the Incident tab. The Incident Assignment Records window is displayed.

Figure 6-2: Incident Assignment Records

5 Add a name for the new assignment group. For this example, Work Managment.

6 Select the Manager from the Manager Name drop down list.

7 Add other information.

8 Select the Operators tab.

9 Specify the number of operators for this assignment group. When you are finished, it will look something like this:
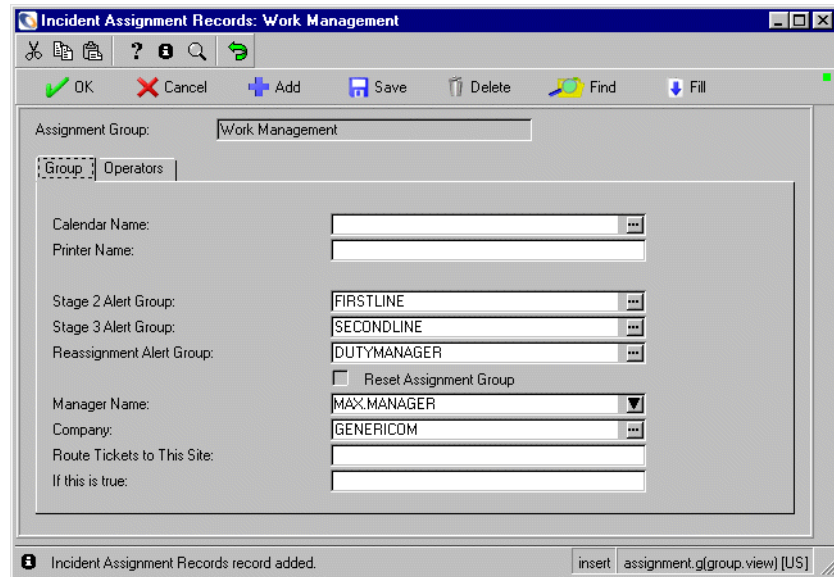
Figure 6-3: New Assignment Group

> **Note:** There is no limit to the number of operators in an assignment group; however, consider how many users should respond to an incident when you create and populate a new assignment group.

10 Click Add to Add the new group and click back to exit.

> **Note:** See the *Application Administration and the System Administrator's Guides* for more information on Assignment Groups

The list is updated once a day. To avoid waiting a day, reboot the server or update the global lists file in Database Manager.

To update Assignment Group in the global lists file:

1 Log in to ServiceCenter.

2 Select Database Manager from the Toolkit tab of the System Administrator's main menu.

3 Enter globallists in the File text box.
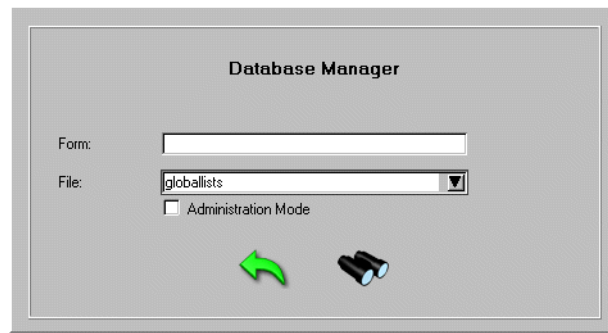
Figure 6-4: Opening the Globallist File

The Globallist Definition search form will open.

4 Enter Assignment Group in the List Name text box and click Search.
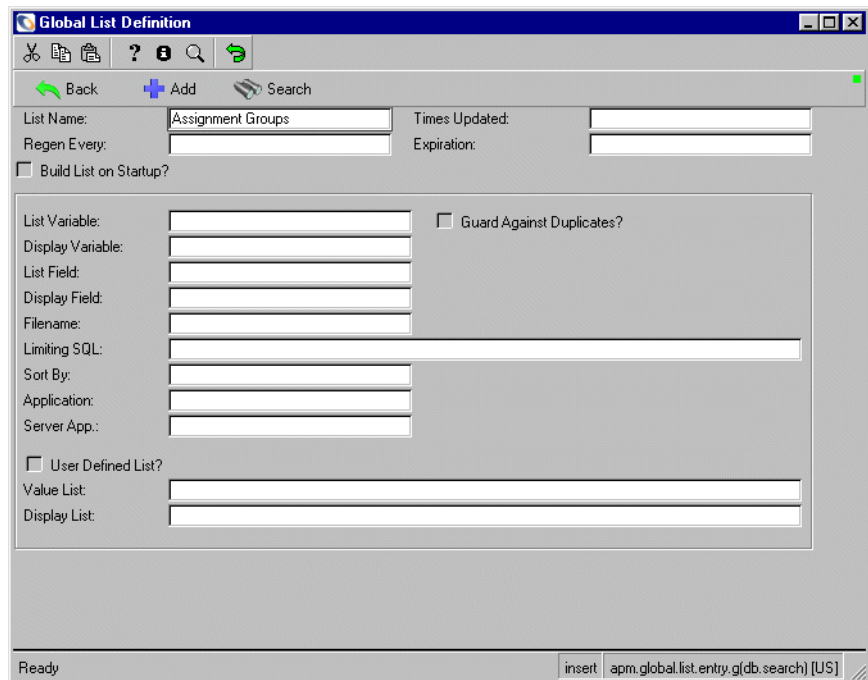
Figure 6-5: Globallist Definition Search Form

The Global List Definition for Assignment Groups will open.

Figure 6-6: Global List Definition for Assignment Groups

5 Enter a date which has passed in the Expiration text box and click Save.

6 Click OK to exit.

7 Log out of ServiceCenter and log back in again.

8 The new assignment group can now be used.

Incidents

Incident tickets appear in Work Management according to the assignment group of the manager or specific assignments of the operator logged in.

For example, the Work Management assignment group, created in *Adding Assignment Groups* on page 121, is managed by MAX.MANAGER. When MAX.MANAGER logs in, all operators assigned to the Work Management assignment group are also displayed, along with their availability and the Incident tickets that have been assigned to them. Tickets to be managed in Work Management by MAX.MANAGER, should contain the Work

Management assignment group (or another group he manages) in the **Primary Assignment group** field of the record when they are created in ServiceCenter.

Figure 6-7 shows an Incident ticket that appears in MAX.MANAGER's Work Management mailbox. For more information, see the *Application Administration Guide*.

Figure 6-7: Setting Incident to Appear in Work Management

Changes and Tasks

Change and task records are designated for pick up by Work Management, according to the value in the **Work Manager** field. If *MAX.MANAGER* is specified in this field, when he logs into Work Management, the new change or task record will appear in his mailbox.

Figure 6-8 shows a change record that appears in MAX.MANAGER's Work Management mailbox.

Figure 6-8: Setting Change to Appear in Work Management

For more information, see the *Application Administration Guide*.

Requests

Request quotes like the other ServiceCenter action items have a complex approval and assignment process. At the appropriate point in the procurement or service request cycle, a quote must be assigned to an operator to be completed/delivered. If a request quote is to appear in Work Management for a specific operator/manager, that operator/manager must be named in the Assigned to field. A quote whose individual line items have a specific operator/manager defined in the Coordinator field will also appear in the Work Management mailbox of that user.

Figure 6-9 shows a request record that appears in MAX.MANAGER's Work Management mailbox.

Figure 6-9: Setting Request to Appear in Work Management

For more information, see the *Request Management Guide*.

Viewing Details in Work Management

Schedule Window

There are several ways to view details of the ServiceCenter records displayed in the Schedule window. The first method brings up the respective ServiceCenter form used to display Incidents, Changes, Requests, or Tasks, and the latter two ways display the data through Work Management forms.

To view the detail through the Schedule window:

1 *Double-click* any item in the Schedule pane or Spreadsheet pane.

2 *Highlight* an item with the mouse pointer.

3 Click the **right mouse button** to display a shortcut menu of options.

4 Choose **More Details.**

5 Select **View** > **Schedule Details...**

Additional Record Details

To view additional Incident, Change, Request, and Task details:

1 Select **Options** > **Filters** > **Task Details.** Figure 6-10 shows the Task filter setup dialog box.

Figure 6-10: Work Management Task Details Filter

2 You can modify your filter to display certain Incidents, Changes, Tasks, Requests, and details. For more information, see *Filtering ServiceCenter Record Items* on page 129.

3 Return to the Schedule window.

4 Select **View** > **Schedule Details.** Figure 6-11 shows the Task Details dialog box that displays the first Incident, Change, Request, or Task in the list.

Figure 6-11: Task Details Dialog Box

5 Do one of the following:

■ Use the scroll buttons in the top panel to browse through the records.

■ Enter the Incident, Change, Request, or Task ID in the edit box between the scroll buttons and press **Enter**.

Note: You cannot modify the attributes of an Incident, Change, Request, or Task in this dialog box. Do that in ServiceCenter.

Filtering ServiceCenter Record Items

To filter ServiceCenter record items:

1 Select **View** > **All Tasks...**

2 Right-click the **Task Details** dialog.

A menu with the following options appears:

- Filter
- Show Pages
- Print Pages
- Show Contact
- View Task

3 Select **Filter** to open the Task Filter dialog. For more information, see *Work Management Task Details Filter* on page 128.

4 Select the values from the different tabs described in the following table.

Tab	Function
Detail	Allows you to select the Period start date, Period type, and Number of periods during which the filter will operate. You also can select to display Incidents, Changes, Requests, or Tasks that have already been completed and whether tickets from selected assignment groups are to be displayed. Use the drop down arrow menus to select from predefined options.
Operator	Allows you to select which operator's items will be displayed.
Category	Allows you to select which Incident, Change, Request, and Task categories to display.
Contact	Allows you to select whether items from specific contacts are to be displayed.

5 You can also set the filter options by selecting **Options** > **Filters** > **Task Details....**

Note: The filter option is not available in the Task Details dialog when it is invoked by selecting **Views** > **Schedule Details....**

Filtering locked Incidents, Changes, Requests, and Tasks

1 Do one of the following:

- Select **Options** > **Filters** > **Schedule window**.
- Right-click to invoke the shortcut menu from the Schedule window, then select **Filter** from the displayed menu.

2 Select *Lock* from the **Data element** combo box.

3 Select *equal to* from the **Operator** combo box.

4 Set the **Value** to *Operator Lock*.

5 Set the **Logical** field value to *OR*.

6 On the next line down, use the same values for **Data element, Operator** and **Logical** field, but choose **Time Lock** for the **Value** field, as shown in Figure 6-12.

Figure 6-12: Schedule Window Filter Settings

7 Click **Save** to save the filter condition. If the new filter settings do not immediately take effect, clear the Schedule window setting to apply the filter.

8 To apply the filter to the Schedule window, do one of the following:

- Select **View** > **Schedule** > **Apply Filter**.
- Right-click while in the Schedule pane to invoke shortcut menu, then click **Apply Filter**.

This changes the view in the main Schedule window, where the *Operator* and *Time locked* items are highlighted while others appear grayed.
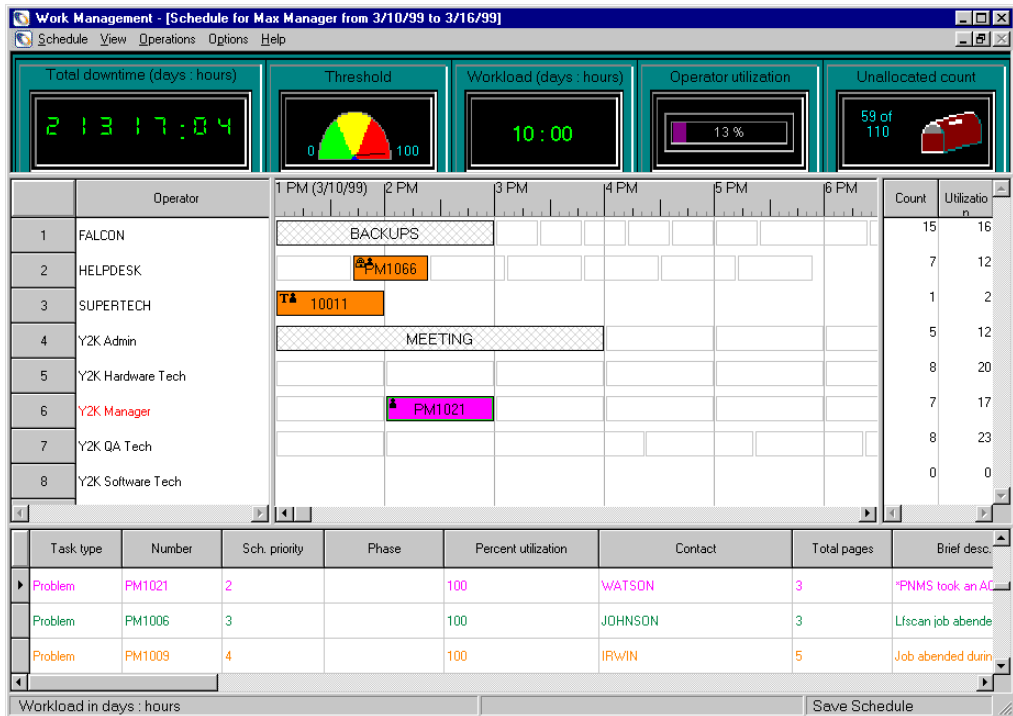
Figure 6-13: Locked Work Management Schedule View

For more information, see *Locking Tickets* on page 152.

Filtering Incidents, Changes, Requests, and Tasks on Downtime

To filter on downtime:

1 Do one of the following:

- Select **Options** > **Filters** > **Schedule window**.
- Right-click to invoke shortcut menu from the Schedule window, then select **Filter** from the displayed menu.

2 Select **Downtime** from **Data element** combo box, as shown in Figure 6-14.

Figure 6-14: Work Management Schedule Filter

3 Select **greater than** in the **Operator** combo box.

4 Specify **03:00:00** for the **Value** field.

5 Select **OR** in the **Logical** field.

6 Repeat steps 5 through 8 on another line; however, specify **equal to** for the **Operator** value.

7 Click **OK** to save the filter condition.

8 Do one of the following:

- If the Schedule window display does not refresh, applying the filter, select **View** > **Schedule** > **Apply Filter**.

- Right-click while in the **Schedule** pane to invoke shortcut menu, then click **Apply Filter**.

This changes the view in the Schedule window, those items with a downtime greater than or equal to three days appear highlighted while others are dimmed.

Task Details Dialog Box

The **Task Details** dialog box has three pages of information about the
Incident, Change, Request, or Task:

- The Contact page, which provides details on the contact who reported the
  Incident, Change, Request, or Task. For more information, see *Contact
  Page* on page 135.

- The Operator Assignment page, which presents details on the operator
  assignment and the scheduled start date and time. For more information,
  see *Operator Assignment Page* on page 136.

- The Other page, which describes the nature of the Incident, Change,
  Request, or Task. For more information, see *Other Page* on page 137.

In addition to viewing information about an Incident, Change, Request, or
Task, you can use the **Task Details** dialog box to create a new Incident,
Change, Request, or Task, or edit existing Incidents, Changes, Requests, or
Tasks.

Figure 6-15 shows navigation buttons at the top of the **Task Details** dialog
box to help navigate through Incidents tickets, Change requests, Request
quotes, and their associated tasks selected from the database.

Figure 6-15: Task Details: Contact Page

To the right of the scroll buttons you may see icons.

- If the icon is a human figure, the Incident, Change, Request, or Task is locked to the Operator.
- If the icon is a padlock and a human figure, the Incident, Change, Request, or Task is locked to the operator and time.
- If the icon is a flag, the Incident, Change, Request, or Task is set to *Highest Priority*.

Contact Page

Contact information has ten attributes, displayed in the fields of the **Task** dialog box and described as follows:

Field	Definition
Contact	The name of the contact who issued this Incident, Change, Request, or Task is displayed in this field. If the contact name is not given, *CONTACT_UNKNOWN* is displayed
Expertise Level	The required expertise to solve the Incident, Change, Request, or Task.
Category	The ServiceCenter category that describes the record.
Number	The unique number assigned to each Incident, Change, Request, or Task.
Action	The specific information about the contact request. This field cannot be edited.
Status	The current resolution and alert status of the Incident, Change, Request, or Task and whether assigned yet, mapped to the respective fields in the *probsummary* table (file) in ServiceCenter.
Reported Date and Reported Time	The date and time that the record was first entered into the system.
Priority	The level of immediacy that is associated with the record, *1* being the highest priority level.
Assignment group	The current assignment group associated with each Incident, Change, Request, or Task, and other groups available.
Total pages	The number of times the record has been updated.

Operator Assignment Page

Figure 6-16: Task Details: Operator Assignment page

The Operator page describes the assigned operator and the ongoing status of the Incident, Change, Request, or Task. The operator page also lists the Scheduling information for the record. Its fields are as follows:

Field	Definition
Operator	Identifies which operator has been assigned to the current Incident, Change, Request, or Task. The combo box of operators lists all operators; the operators that do not have the required expertise to complete the Incident, Change, Request, or Task are grayed. The manager can override the suggested list of operators presented by Work Management by choosing an operator that is grayed.
Completed	Indicates if the item is completed or not.
Earliest start date Earliest start time	User-entered earliest date/time for addressing task.
Schedule Travel time	User-entered travel time schedule, if necessary.
Schedule start date and Schedule start time	Automatically entered by the system, recording when the Incident, Change, Request, or Task is allocated to an operator.
Schedule Duration	Updated by Work Management with the Duration estimate for the Incident, Change, Request, or Task category.

You can reschedule an Incident, Change, Request, or Task from this screen by entering in a new Start date or time. Modifications made from here are updated on the main Schedule window.

The **Actual** metrics for the Incident, Change, Request, or Task are also displayed on the Operator page. On completion, Work Management automatically updates the **Actual Start date, Actual Start time, Actual Travel time**, **Actual End date**, and **Actual End time** field with the values recorded by the operators as they complete the work. These fields are grayed out and inaccessible until the Incident has been marked as *Completed, as noted by a Yes value in the Completed field.*

Note: All operator details can be created, edited and deleted via the right-click shortcut menu, and the field's contents can be overwritten.

Other Page

Figure 6-17: Task Details: Other Incident or Change Information Page

There are four different fields for adding and displaying information about an incoming item. The first two fields are user defined. Choose **Options** > **User Defined Fields…** in the Schedule window to select the field labels and combo boxes to be customized. For more information, see *The Schedule Window* on page 30.

Field	Definition
Brief Description	The overview information about the Incident, Change, Request, or Task, used for organizational or reporting purposes. Work Management does not require that the **Brief Description** field be filled in when creating new Incidents tickets, Change requests, Request quotes, and their associated tasks.
Update Action/ Resolution	The specific notes or resolution recorded about the Incident, Change, Request, or Task.

Show Pages

Whenever a record is updated in ServiceCenter, a new *page* is created with the name, date and content of the update.

To view the pages of an item:

1 In the **Task Details** dialog, select the record.

2 Click the right mouse button to reveal a short-cut menu.

3 Do one of the following:

- Method 1: Select **Show Pages**.
- Method 2:
    - Highlight an Incident, Change, Request, or Task on the Spreadsheet pane.
    - Click the right mouse button to reveal a short-cut menu.
    - Select **Show Pages**.
- Method 3:
    - Highlight an Incident on the Schedule window pane.
    - Click the right mouse button to reveal a short-cut menu.
    - Select **Show Pages**.

At the bottom of the **Show Pages** dialog is a group of scroll buttons used to navigate through the pages of an Incident, Change, Request, or Task.

Note: Instead of using the right mouse button, you can also invoke **Show Pages** from the **View** menu.

The Show Pages option either shows the Show Pages dialog of ServiceCenter or that of Work Management. This can be configured only by the ServiceCenter Administrator.
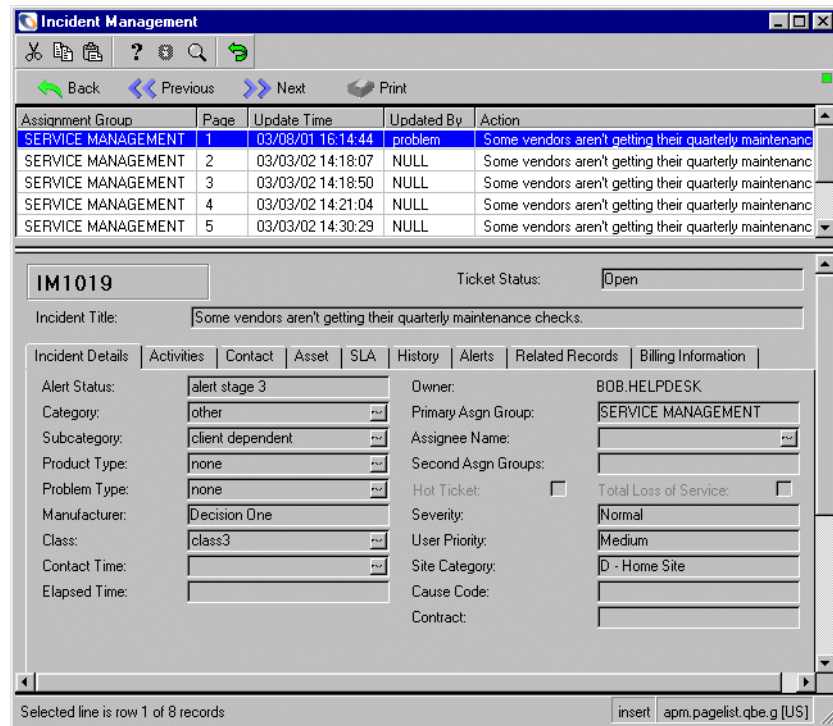
Figure 6-18: Incident Pages

Printing Pages

To print the pages of an Incident ticket, change, task, or request:

1 Click the **Print** button from the system tray in the ServiceCenter display if it is available.

2 Select **File** > **Print screen** to also print the record.

Opening New Incidents, Changes, Requests, or Tasks

Incidents tickets, Change requests, Request quotes, and their associated tasks cannot be opened from within Work Management. All new Incident, Change, Request, and Task records must originate in ServiceCenter.

See the *ServiceCenter User's Guide* and the *IM Tailoring Guide* for more information on creating and opening ServiceCenter records.

Viewing Item Details in ServiceCenter

Once an Incident ticket has been opened and registered in ServiceCenter, if it is assigned to the Help Desk, Work Management detects it. This ticket is then in the Work Management *mailbox* (Unallocated count gauge) until it has been assigned to a specific operator on the Help Desk. The same is true for Changes, Tasks, and Requests as well.

To view Incidents, Changes, Requests, and Tasks from the *mailbox*:

1 Click the *mailbox* icon to reveal the list of unallocated items.

2 From the list that appears, select a record to view.

3 Double-click the selected item.

The selected record is displayed within the ServiceCenter form.

4 Close the record by clicking **OK** or **Cancel**.

5 To view records from the Schedule window or Task dialog, double-click the colored ticket bar or spreadsheet listing in the Schedule window.

The record is displayed in the ServiceCenter format.

6 Close the record by clicking **OK** or **Cancel**.

Editing Tickets

Few fields (Expertise Level field on the Contact page, the Operator, Utilization, Earliest, and Schedule date/time fields on the Operators page, and the two user-defined Attribute fields on the Other page) are editable from within Work Management. The majority of modifications and edits to records must occur in ServiceCenter. See the *ServiceCenter Quick Start Guide* and *PM Custom Guide* for more information.

To make edits to the fields accessible from within Work Management:

1 Figure 6-19 shows the Task Details form. For more information, see *Viewing Details in Work Management* on page 127.

Figure 6-19: Task Details

2 Move through the fields with the arrow keys.

3 Make the required changes. For the **Expertise Level**, **Operator,** and the **Attribute** fields, click the arrow (Fill) button to the right of the combo box.

   For the **Percent Utilization, Earliest,** and **Schedule** date or time values, position the cursor in the field and type in the new values.

4 Right-click to display the shortcut options menu.

5 Select **Replace** from the short-cut menu to save the changes to the database. This overwrites the contents of the record with the new information.

Deleting Tickets

Tickets can only be closed and deleted from within ServiceCenter. See the *ServiceCenter User's Guide* for more information.

Marking Tickets as Completed

Tickets can only be closed (marked as complete) from within ServiceCenter. Please see the *ServiceCenter User's Guide* for more information.

Assigning Tickets to a Different Assignment Group

The Task Details dialog box displays only those Incidents tickets, Change requests, Request quotes, and their associated tasks associated with the defined assignment group(s). You can change the assignment group definition for Incidents tickets, Change requests, Request quotes, and their associated tasks viewed through the Task Details dialog box, however, definitions must be changed on the item record itself in ServiceCenter. See the *ServiceCenter User's Guide* for more information.

7 Scheduling

CHAPTER

This chapter describes scheduling in Work Management to for the ServiceCenter administrator, manager, or user. It has information about how to schedule, reschedule, lock, and unallocate Incidents tickets, Change requests, Request quotes, and their associated tasks, as well as how to use autoschedule functionality.

Read this chapter for information about:

Introduction

Work Management displays the schedule information, including assigned and unassigned Incidents tickets, Change requests, Request quotes, and their associated tasks, in the Schedule window for a specific manager. Work Management uses the manager's login ID to identify which group of operators and tickets to present.

When auto scheduling is enabled, Work Management schedules incoming Incidents tickets, Change requests, Request quotes, and their associated tasks to simultaneously minimize down time, maximize operator utilization, and account for Incident, Change, Request, or Task priorities.

Work Management permits each manager to schedule only Incidents tickets, Change requests, Request quotes, and their associated tasks that fall within the manager's assignment group. Only operators assigned to the logged in manager are able to receive new Incidents tickets, Change requests, Request quotes, and their associated tasks. Each manager maintains an independent schedule of work. In this way, Work Management supports multiple work schedules, each pertaining to different functional areas of the organization.

Contact, category, and operator data are also displayed from the menu options on this screen. The main function of the Schedule window, however, is to display the current status of an assignment group; schedule Incidents tickets, Change requests, Request quotes, and their associated tasks; and analyze team performance.

For more information, see *Background Scheduling* on page 183.

Manual Scheduling

Mailbox Method

From the Schedule window, a manager manually assigns Incidents tickets, Change requests, Request quotes, and their associated tasks to operators by dragging them from the mailbox onto an operator's line in the Schedule pane.

To schedule from the mailbox:

1 Click the *Unallocated count* gauge shown in Figure 7-1.

Figure 7-1: Unallocated Count gauge

2 The Mailbox opens. Figure 7-2 shows the mailbox list.

Figure 7-2: Work Management Mailbox

3 Click an Incident, Change, Request, or Task.

4 Hold down the left mouse button, drag and drop the selected item into an operator's line in the Schedule window.

Figure 7-3: Manual Scheduling

When dragging the Incident, Change, Request, or Task from the mailbox, Work Management grays out the operators that lack the necessary expertise to handle it. The list of acceptable operators remains enabled. However, you can assign Incidents tickets, Change requests, Request quotes, and their associated tasks to operators, even if they do not have the expertise to handle them.

You can drop Incidents tickets, Change requests, Request quotes, and their associated tasks anywhere on the timescale, as long at they fall after the Reported date and time for the Incident, Change, Request, or Task.

Task Details Dialog Box Method

A manager may also assign Incidents tickets, Change requests, Request quotes, and their associated tasks to an operator by updating the Operator, Scheduled Start date and Scheduled Start time information using the following process.

To schedule from the Details dialog box:

1 Click an Incident in the Spreadsheet pane of the Schedule window.

2 Scroll through the records using the scroll bar until you reach an unassigned item, usually at the bottom of the list and containing no operator name in the **Operator** column.

3 Open the **Task Details** dialog box by right-clicking on the record and selecting **More Details** from the short-cut menu.

4 Click the Operator tab to open the *Operator* page of the **Schedule Details** dialog box.

5 Assign an operator to the item by clicking the arrow button on the **Operator** combo box and selecting an operator from the drop-down list.

This box lists all operators associated with the assignment group. Work Management grays out the names of operators without experience to resolve this Incident, Change, Request, or Task. Those who have the required expertise to complete the item appear in black.

6 Enter the *Earliest and Schedule date* and *time* values.

Figure 7-4: Task Schedule Details

7 Double-click the ServiceCenter icon in the upper left corner to close the dialog box.

You are prompted to confirm whether your changes are to be saved or canceled.

8 Select **Yes** to save the changes, or **No** to reject the changes.

You are returned to the Schedule window.

These changes are reflected in the Work Management Schedule window of the appropriate manager (according to the associated assignment group for the Incident).

Incidents tickets, Change requests, Request quotes, and their associated tasks that are placed in positions that overlap in the timescale of the Schedule window are put on another line for that operator.
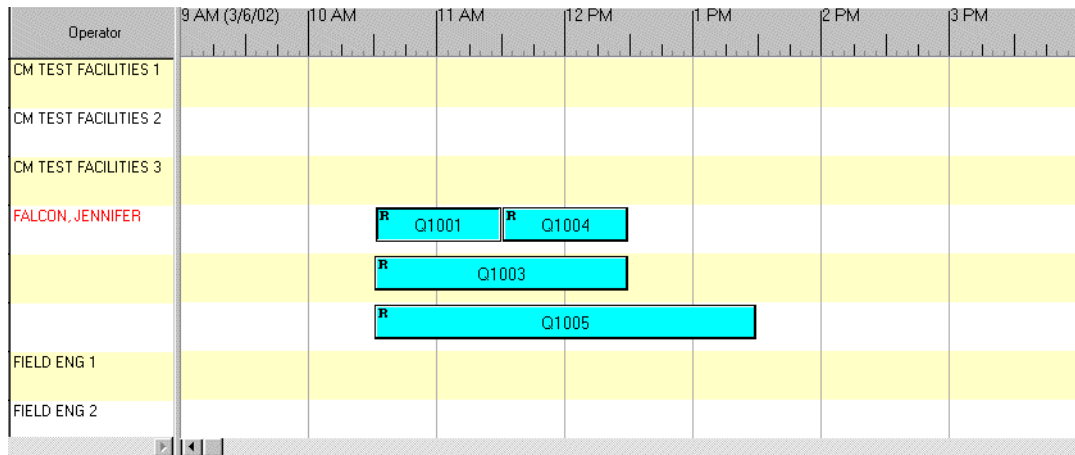
Figure 7-5: Multiple Schedule Rows

Multiple Rows

Listed below are the instances where multiple rows for an operator are created:

■ When the operator or manager drags and drops an Incident, Change, Request, or Task over another Incident, Change, Task, or commitment, this results in overlapping of the bars. Multiple rows are created to remove the overlapping.

■ Assigning Incidents tickets, Change requests, Request quotes, and their associated tasks from the Task details dialog box can result in Incidents tickets, Change requests, Request quotes, and their associated tasks being assigned at the same time to the same operator. This results in overlapping of the bars. Multiple rows are created to remove the overlapping.

■ If there are Incidents tickets, Change requests, Request quotes, and their associated tasks with varying percent utilization, Auto Scheduling and Compact may result in more than one Incident, Change, Request, or Task assigned to an operator within the same time frame. In this case again, the Schedule window displays the bars on different rows.

To correct the overlap manually:

1 Drag and drop the items to rearrange the placement of Incidents tickets, Change requests, Request quotes, and their associated tasks.

2 Select **Operations** > **Re-arrange** to remove extra rows beneath an operator.

To automatically correct any scheduling conflict:

▶ Select **Operations** > **Compact** > **All** to remove any scheduling conflicts.

Rescheduling Records

You use the same drag and drop method used to assign tickets from the mailbox to change the Scheduled Operator, Date, and Time of an Incident, Change, Request, or Task.

To reschedule:

1 Click any item in the Schedule window.

2 Press and hold the **left mouse button** to select the Incident, Change, Request, or Task.

3 Drag the item to another operator's line.

4 Release the mouse button.

The status bar at the bottom of the window displays more information on where you are moving the Incident, Change, Request, or Task.

Important: Work Management uses the defined areas of expertise to determine which operators can handle a given issue. However, you can assign Incident tickets to operators who do not have the expertise to complete them. If you use the auto scheduler after assigning a ticket to an unqualified operator, the Incident, Change, Request, or Task is unallocated and, if possible, reallocated to an operator who has the necessary expertise.

Note: Incidents tickets, Change requests, Request quotes, and their associated tasks can be rescheduled to any point in time after the initial Reported date and time.

As you move the Incidents tickets, Change requests, Request quotes, and their associated tasks, and modify the schedule, the performance gauges at the top of the screen automatically update the information in the Downtime, Workload, and Operator Utilization gauges to reflect the changes.

Scheduling Controls

Show Dependency

This option displays the dependency between the parent change and the child tasks. To see the dependency between a change and task, both the change and the task should be visible in the Schedule window. The system will not display dependencies for unassigned Changes, Tasks, and Requests.

Note: If both Apply filter and Show Related are applied, Show Related takes precedence for display. The schedule filter is applied only after Show Related is unchecked.

To display a connector between a parent change and a child task:

1 Allocate the parent change and child tasks to operators.

2 Scroll to put the parent change or child tasks in the Schedule window.

3 Do one of the following:

- Select **View** > **Schedule** > **Show Related**.

- Click the **right mouse-button** on a change task, or request to display a shortcut menu, and select **Show Related**.

Figure 7-6 shows the dependency between the parent change 1002 and child task 10011.
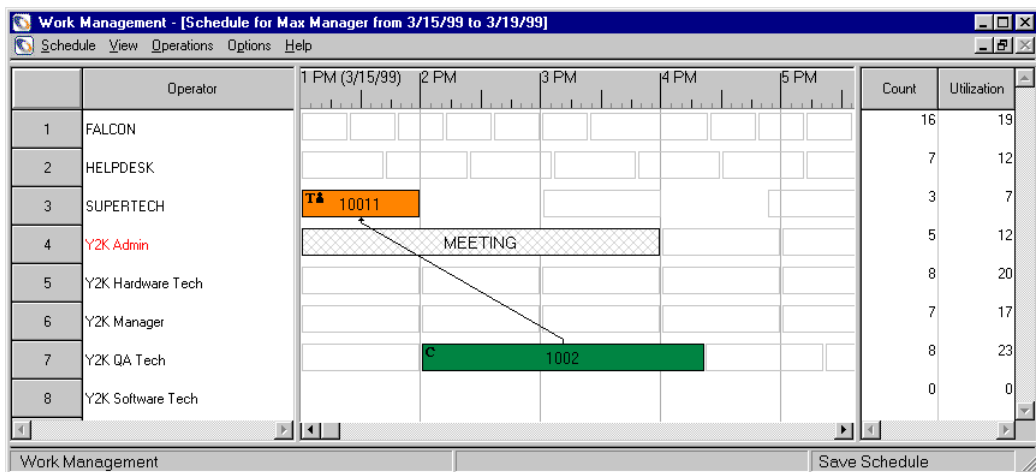
Figure 7-6: Parent-Child Connection

Locking Tickets

You can lock Incidents tickets, Change requests, Request quotes, and their associated tasks at their present position in the Work Management Schedule window. Locking Incidents, Changes, Requests, or Tasks prevents the Auto scheduler from assigning them to either another operator or another time. You have the option of locking an item to a specific operator or to both a specific operator and time. If an Incident, Change, Request, or Task is locked to an operator only, the scheduled date and time for the item may change. Locking both the operator and the time will prevent this from occurring.

If you want to assign an Incident, Change, Request, or Task to an operator who does not have the expertise, and if you do not want the Auto scheduler to unallocate or reassign it, you can lock the ticket.

To lock an Incident ticket, change, task, or request:

1 Select a particular Incident, Change, Request, or Task in the Schedule window, Spreadsheet pane, or Schedule Detail dialog box.

2 Select **Operations** > **Lock**. A submenu opens to the right.

3 Select either the **Operator lock** or the **Operator & Time lock** option.

From the keyboard, you can also use the Ctrl+L key combination to activate the Operator lock and the Ctrl+K key combination to activate the Operator & Time lock.

Once locked, the Incident, Change, Tasks, or Requests bar displays one of two icons:
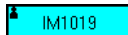
- For an **Operator lock**, a human figure appears.
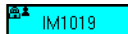
- For an **Operator and Time lock Work**, a tiny padlock and human figure appear.

4 If you are in the Schedule window (as shown above) pull down the **Schedule** menu. Select the **Save** option to record the changes to the locked ticket.

5 Do one of the following:

- If you are in the Task Details dialog box, right-click to reveal the **Edit** menu.

- Pull the **Task** menu down from the menu bar behind the Schedule window.

6 Select the **Replace** option from either menu to save the changes to the locked item.

To Unlock an Incident ticket:

1 Select a particular Incident in the Schedule window, Spreadsheet pane, or Schedule Detail dialog box.

2 Select **Operation** > **Lock**.

The type of lock currently applied to the Incident will have a check mark beside it.

3 To remove the lock, select the appropriate menu option.

Work Management automatically returns the Incident, Change, Request, or Task to an unlocked status.

Establishing Highest Priority

You may want to schedule one Incident, Change, Request, or Task ahead of all other items, whatever the current item priority is. You can do this by declaring that the Incident, Change, Request, or Task is of highest priority.

To declare an Incident priority status as Highest Priority:

1 Select the particular Incident, Change, Request, or Task in the Schedule pane.

2 Select **Operations** > **Highest Priority**.

You can also use the Ctrl+H keys to perform the same function from the keyboard.
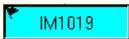
The item bar in the Schedule pane displays a flag icon. You can customize Work Management so that the color will change also. For more information, see *Taskbar Tab* on page 176.

Note: If you are in the Schedule window, pull down the **Schedule** menu.

3 Select the **Save** option to record the changes to the locked ticket.

4 If you are in the **Task Details** dialog box, right-click with the mouse to reveal the **Edit** menu, or pull the **Task** menu down from the menu bar behind the Schedule window.

5 Select the **Replace** option from either menu to save the changes to the locked ticket.

Unallocating Incident tickets

Incidents tickets, Change requests, Request quotes, and their associated tasks that are not scheduled are considered *unallocated*. Incidents tickets, Change requests, Request quotes, and their associated tasks that are unallocated are not deleted from the system, but are available for future scheduling.

To unallocate an Incident, Change, Request, or Task currently scheduled to an operator:

1   Highlight the Incident, Change, Request, or Task.

2   Select **Operations** > **Unallocate**.

You can also use the Ctrl+U keys to perform the same function from the keyboard.

This action moves the Incident, Change, Request, or Task back to the mailbox. The system prompts you with a message asking for your confirmation. The number of Incidents tickets, Change requests, Request quotes, and their associated tasks in the mailbox is updated dynamically to reflect changes to the schedule.

Viewing and Editing Operator Details

1   In the Schedule window click an operator in the **Operator** column.

2   Double-click the name to open the **Operator** dialog box.

The dialog box lists the operator details for all of the operators assigned to the logged in manager. The following information is included: the login ID, outstanding count (the number of outstanding Incidents, Changes, Requests, or Tasks currently assigned), areas of expertise, and two user-defined fields.

3   To edit any of these values, you must determine if these changes need to be made in ServiceCenter to appear in the Operator dialog box. For more information, see *Viewing and Editing Operator Information* on page 96.

Percentage Utilization

A task may take a duration of one month to be resolved or completed, but this does not mean that it requires an effort of *100*% during that time. The manager can identify the percent utilization required to complete these tasks. Percent utilization can be defined for all imported ServiceCenter records.

For example, an operator is assigned a task with a duration of two hours and with percent utilization of 50%. This means this operator can be assigned with another task at the same time, with a percent utilization less than or equal to 50%.

To define the percent utilization, use the following process:

1 Highlight an Incident, Change, Request, or Task with the mouse pointer.

2 Click with the **right mouse button** to display a shortcut menu.

3 Do one of the following:

   ■ Choose **More Details**.

   ■ Select an Incident, Change, Request, or Task.

4 Select **View** > **Schedule Details**.

   The Task Details dialog box is displayed.

Figure 7-7: Ticket Details

5 Go to the *Operator* page in the Task Details dialog box.

6 Change the value in the **Percent utilization** field.

   You can select a number between 10% and 100%. By default the value will be 100%.

   Note: For all completed tasks Percent utilization is always 100%.

If the Percent utilization is less than 100%, the operator can be assigned additional tasks in the remaining availability, which may result in multiple rows of assigned Incidents tickets, Change requests, Request quotes, and their associated tasks.

For example, if change 1001 has a percent utilization of 50%, Incident IM1002 a percent utilization of 30%, and request 1003 a percent utilization of 20%, and if all these tasks are 2 hours long, then they all can be assigned to the same operator with a Schedule start time at 9 a.m. and end time 11 a.m. on the same day. This is possible because the effort percent utilization for all these Incidents equals 100% and therefore can be fit within the same time period.

Using the Auto Scheduler

Work Management provides the option to enable automatic scheduling. When the number of Incidents, Changes, Requests, or Tasks to be scheduled exceeds twenty four, the thousands of possible schedule combinations make it impossible for the user to manually generate the best schedules. It becomes difficult to find a schedule that meets all possible metrics. The automatic scheduling option manages both schedules and metrics to formulate an on-the-fly schedule that satisfies the greatest needs.

Automatic scheduling affects only those Incidents tickets, Change requests, Request quotes, and their associated tasks; and operators assigned to the manager currently logged into Work Management. The Automatic scheduling option does not affect the schedule for any of the other managers in the organization.

When scheduling Incidents tickets, Change requests, Request quotes, and their associated tasks, Work Management is bound by several guidelines.

User-defined parameters include:

- Overall priority for Incidents tickets, Change requests, Request quotes, and their associated tasks
- Required minimum operator expertise
- Operator areas of expertise
- Operator availability/commitment

- Downtime that increases priority
- Percent utilization for each Incident, Change, Request, and Task

Scheduling Criteria

Priority

Work Management creates an overall priority for each Incident, Change, Request, and Task, based on its status and severity. Work Management then uses a priority lookup table to determine an overall priority. Overall priority affects the way Incidents tickets, Change requests, Request quotes, and their associated tasks are automatically scheduled — Incidents tickets, Change requests, Request quotes, and their associated tasks with a higher priority are scheduled earlier in time than Incidents tickets, Change requests, Request quotes, and their associated tasks with a lower priority.

Incident, Change, Request, and Task priorities are not fixed. As Incidents tickets, Change requests, Request quotes, and their associated tasks wait to be resolved, they can escalate in priority and receive more preference during scheduling. The amount of time required to increase the priority of an Incident, Change, Request, and Task is determined by the Downtime that increases priority value. This value appears in the Category dialog box.

To access the Category dialog box, select **View** > **Category.** For more information, see *Viewing Categories* on page 66.

Note: The Auto scheduler schedules based on the priority of Incidents tickets, Change requests, Request quotes, and their associated tasks, apart from other considerations. The overall priority of an item is arrived at from the Status and Severity of an Incident, Change, Request, or Task.

The priority for a particular combination of Status and Severity, is determined by the System ServiceCenter Administrator. A lookup table is maintained in the Work Management database that is used while scheduling.

The priority of an Incident, Change, Request, or Task is seen in the Schedule window in the form of colors. The color for the status or priority is defined in the Schedule window tab of the Customize dialog. For more information, see *Information Box* on page 177.

Operator Attributes

Work Management also uses the attributes of operators to determine whether or not they can resolve particular Incidents, Changes, Requests, or Tasks. Operators are assigned Incidents tickets, Change requests, Request quotes, and their associated tasks only if they have the required areas and levels of expertise, and they are available to do the work.

To define operator attributes for those operators assigned to the manager who is currently logged in:

▶ Select **View** > **Operator** to open the **Operator** dialog box.

The Operator dialog box displays information for only those operators assigned to the current manager. For more information, see *Viewing and Editing Operator Information* on page 96.

Downtime

There are many possible schedules the Auto scheduler can generate that satisfy the established conditions for operator commitment and priority. Unless you choose not to schedule based on priorities, the objective of the scheduler is to minimize the organizational downtime and to optimize the operator utilization or load.

In terms of downtime, Incidents tickets, Change requests, Request quotes, and their associated tasks are scheduled so that the overall wait time for your contacts is the least possible. At the same time, all of the Incidents tickets, Change requests, Request quotes, and their associated tasks are evenly distributed between operators with the needed expertise. Only the schedule that meets the required constraints and has the best values for downtime and operator utilization is selected.

For an example of how downtime can affect the order in which Incidents tickets, Change requests, Request quotes, and their associated tasks are scheduled, take a case where two contacts have reported Incidents to the help desk. Contact A, with a difficult Incident that requires 7 hours to complete, reports the Incident before Contact B. Contact B has a small Incident that only requires 1 hour to complete. Both Incident tickets are assigned to the same operator. As happens in many cases, Contact A's Incident will be scheduled before Contact B because Contact A reported the Incident first.

For example, Contact A has a downtime of 7 hours, which is simply the amount of time required to resolve the Incident. Contact B has a downtime of 8 hours: 1 hour to complete the Incident, but 7 hours of waiting while the operator completes Contact A's Incident first. In this case, the organizational downtime (the sum of Contact A's and Contact B's individual downtimes) is 15 hours.

Rearranging the order in which these two Incident tickets are completed reduces the downtime to the organization.

By resolving Contact B's shorter Incident first, the overall downtime to the organization drops from 15 hours to 9 hours — a 40% improvement. In the schedule shown below, Contact B has an individual downtime of 1 hour and Contact A, who waits 1 hour for the technician to start work, has a downtime of 8 hours.

If you set Work Management to focus on priorities, the highest priority Incidents tickets, Change requests, Request quotes, and their associated tasks are scheduled before the rest, even if it creates a greater organizational downtime. Once priorities have been accounted for, Work Management seeks to minimize the downtime and maximize the operator utilization.

When creating schedules, locked Incidents tickets, Change requests, Request quotes, and their associated tasks are left as is. Other Incidents tickets, Change requests, Request quotes, and their associated tasks are scheduled around the locked item.

The schedule is not automatically saved, so you can explore various scheduling scenarios by rearranging Incidents tickets, Change requests, Request quotes, and their associated tasks before you decide to save the schedule.

To have the schedule created automatically:

1 Select **Options** > **Customize.**
2 Choose **Background Scheduling** on the Schedule window tab. For more information, see *Background Scheduling* on page 183.

Configuring the Scheduler

To achieve the most efficient schedule for your needs, you must provide the scheduler with information specific to your operation.

To Autoscheduler tasks:

1 Select **Operations** > **Autoschedule...** > **All** (or the name if the operator).

The Autoschedule window will appear.
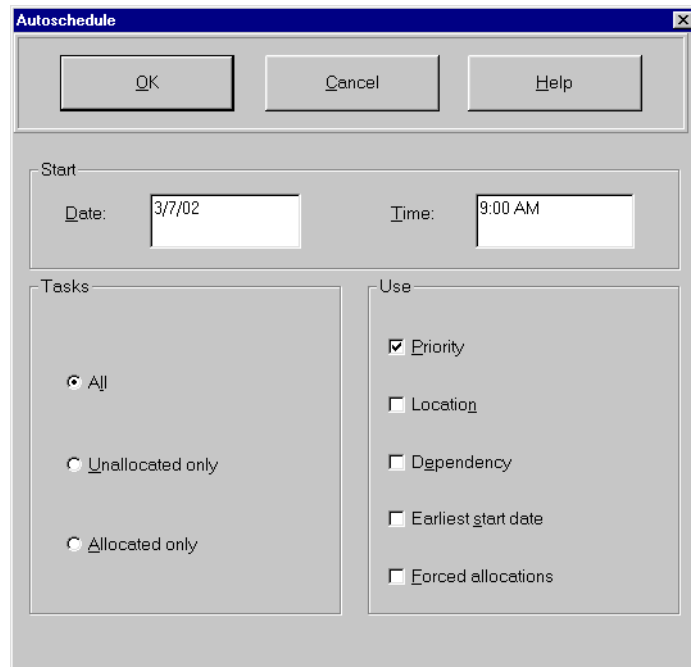
Figure 7-8: Autoschedule Settings

Field	Definition
Start	Allows the user to enter specific dates and times for beginning the Auto scheduler, enabling a future or current start date or time to be set.
Select	Requires the user to specify which Incidents tickets, Change requests, Request quotes, and their associated tasks are to be affected by autoschedule actions. Selecting All incidents or Unallocated incidents only includes items currently in the mailbox, scheduling them to users automatically. Allocated incidents only rearrange Incidents, Changes, Requests, or Tasks currently in the queue of one of the operators.
Priority	Allows the user to exclude the priority component when determining the most efficient schedule. This places the components of Downtime and Operator Attributes as the prime criteria.
Location	Allows the user to schedule based on where the specified issue is located.
Dependency	Allows the user to schedule based on which issues' resolutions are contingent upon the resolution of other issue(s).
Earliest start date	Allows the user to schedule based on which items can be started on the soonest.
Forced Allocations	Allows the user to schedule tasks based on the Force Allocation option in the More Details dialogue box. Tasks will only be scheduled for the allocated operator.

1 Select the desired settings.

2 Click **OK** to have create the schedule automatically, or click Cancel to exit with out scheduling.

3 Examine the schedule and edit it if desired.

4 Click **Save** on the Work Management Schedule menu to keep the changes or exit Work Management without saving them.

Fine Tuning the Schedule

Although Work Management attempts to generate an optimal schedule, there are often special considerations in assigning Incidents tickets, Change requests, Request quotes, and their associated tasks to operators. A manager may want to cater to special situations. (For example, the Sales department

needs special attention this week, or the Purchasing department manager only wants certain people to help him). Catering to special constraints can require the user to make adjustments to the schedule generated by the autoscheduler. These are quickly performed using manual drag-and-drop procedures from the Schedule window. For more information, see *Rescheduling Records* on page 150.

Refreshing the Schedule

The status of the Help Desk is constantly changing. The Refresh option allows you to update the current schedule with any changes to the status of scheduled Incidents tickets, Change requests, Request quotes, and their associated tasks, allowing the manager to keep abreast of which items are completed and which are ongoing.

To refresh the schedule:

▶ Select **Schedule** > **Refresh All** from the Schedule window.

From the keyboard, you can activate the Refresh function by using the Ctrl+R keys.

The Schedule window is automatically updated with any changes made to the status of Incidents tickets, Change requests, Request quotes, and their associated tasks.

Using Compact

The autoscheduler will not move the Operator & Time locked Incidents tickets, Change requests, Request quotes, and their associated tasks, as a result you may have gaps in the schedule. The Compact feature is useful after you fine tune a schedule. After a number of drag and drop operations, there are likely to be gaps among Incidents tickets, Change requests, Request quotes, and their associated tasks, depending on where the items were placed in the schedule. You can remove the gaps by compacting the schedule. You can compact Incidents tickets, Change requests, Request quotes, and their associated tasks for a particular operator or the entire schedule.

Compacting will not alter the sequence of the Incidents tickets, Change requests, Request quotes, and their associated tasks; it places all items one after the other, without any breaks or gaps between them. Compacting the schedule will also move the start of the schedule to correspond to the start of the current Timescale.

To compact the schedule:

1   Select **Operations** > **Compact** from the Schedule window.

2   Do one of the following:

■ Select an operator's name from the Compact sub-menu to compact the Incidents tickets, Change requests, Request quotes, and their associated tasks of a particular operator.

■ Select **Operations** > **Compact** from the Schedule window.

3   Select **All** to compact all Incidents tickets, Change requests, Request quotes, and their associated tasks displayed in the Schedule window.

You can also access the Compact feature from the keyboard by using the Alt+R or Alt+A keys respectively.

Note: You have the option to instruct the Compact function not to move any *Operator & Time* locked Incidents, Changes, Requests, or Tasks. In this case, gaps between Incidents tickets, Change requests, Request quotes, and their associated tasks might continue to exist.

Saving the Schedule

Saving the schedule updates the Operator with all of the current operator assignments. If you are using the Background scheduling function, the schedule is automatically saved. However, if you are manually scheduling Incidents tickets, Change requests, Request quotes, and their associated tasks or fine tuning an existing schedule, you will need to save the changes.

To save the current schedule:

1   Pull down the **Schedule** menu from the Schedule window.

2   Select the **Save** option.

From the keyboard, you can also access this function by using the Ctrl+S keys.

The status bar at the bottom of the screen indicates the current schedule is being saved.

Travel Time

This functionality enables travel time to be automatically added to the task based on the location the task is to be worked on. In addition allow the user modify this default travel time.

The amount of time, if any, required for an operator to reach the location of the task to which he has been assigned. Work Management utilizes two forms of travel time: Estimated travel time and Actual travel time. Estimated travel time is the theoretical time value entered into the system prior to the beginning of the task. After the task has been completed and the information updated, Work Management will calculate the actual travel time associated with that location. Actual time is calculated by averaging all the past travel times to a specific location. For example, if an operator has traveled three times to location A with each trip lasting 20, 25, and 30 minutes respectively, the actual travel time would be 25 minutes.

The Actual travel time is calculated by averaging all past travel times if the tasks are closed and the Actual Start Date\Time, Actual End Date\Time and the Actual Travel time are entered in Service Center before closing the task.

Any default Travel time can be associated to a location using the View/Location menu in Work Management in days:hours:minutes (00:00:00) format (this populates the field wdTravelTime in seconds in the location table). This is the time taken by an operator to travel from the home office to customer's location (place of work) and back to the office.

Any default Duration can be associated to a task category using the View/Category menu in Work Management in days:hours:minutes (00:00:00) format. (This is populated in the wdClsDuration field in seconds in the wdCategory table.)

Manual Drag and Drop

Once a task is manually dragged out from the Mail Box to assign to an operator, the length of a Task bar on the Schedule window is drawn based on the {(default duration from the category table adjusted for skill level) + (default travel time from the location table)}

At this point the user can save the task on the schedule window and the default values are saved (into the wdSchDuration and wdSchTravelime field in the work table) and can be seen in the Schedule Duration and Scheduled Travel time field in the Operator tab in the Mode details dialog in Work Management.

The user also has the option to modify the value in the Schedule Duration or and the Scheduled Travel Time field in the Operator tab in the More Details dialog and then save.

Note: If the user has modified the Scheduled Travel time value in More Details dialog and then for some reason unallocated the task back to the Mail box, the modified value of the Scheduled Travel time will always be used (and not the default Travel time) once the task is reassigned to another operator and a Save AND Refresh is done.

Advisor and Auto Schedule

If any of these above two methods are used to assign tasks to operators with the Location option checked, the system will ensure that for a given day, if a task of one location is assigned to an operator with a travel time then a second task of the same location will be assigned to the same operator (assuming that the operator has the skill for the task's category) making the Scheduled Travel time = Zero

Other Information

- For those tasks for which locations have not been defined a default value of Travel time can be set in the wdCodeDetails table (wdCodeType = 205, wdCodeID = 0 and wdCodeDesc = <default travel time in seconds>.

- In the Mode Details dialog the Schedule Travel time displays blank (read only) if the Task is unassigned. Values are displayed and modified only if the task is assigned to an operator.

- Value in Travel time field in the Bottom spread and in Mail box after a Save AND Refresh:

  - The Travel time field in the Bottom spread and Mail box displays the default value of Travel time from the location table or the actual value if modified by the user in the Schedule Travel time field in the More Details dialog.

  - If the task is not associated to any location then the Travel time field in the Bottom spread and Mail box displays the value as set in the wdCodeDetails table.)

Defining Travel Time and Location

Work Management calculates operator travel time associated with locations when scheduling work. For example, if an operator in location A requires 30 minutes to travel to an assignment in location B, and the task itself requires 1 hour, Work Management will schedule the task has having an overall

duration of 2 hours (1 hour round trip travel time and 1 hour to resolve the task). In order to accomplish this, travel times must be entered into the System through the Location dialog. After travel times have been estimated, Work Management will update these times with actual values.

Travel time is based on the time it takes for the operator to travel from some central location to the location of the task. In the example above, example Location A is the Manager's office (this is a central location for the basis of using travel time) and Location B is the location of the task.

To define, view, or edit travel times from the Location dialog box:

1 Select **View** > **Location** from the main menu. This brings up the Location dialog box.
2 Find the location you wish to view or edit. (If there are more than twelve locations you may have to scroll through the list).
3 Double click in the Travel time column and enter time value associated with the location you wish to define/edit. Make sure to enter the time in days:hours:minutes (00:00:00) format. (All travel times are null by default).
4 Click **Recalculate** to update travel time values with actual values, if actual values are entered in closed tasks for the same location by the users.
5 Click **Refresh** to update scheduled task durations with the new travel time values.
6 Click **OK** to accept changes or **Cancel** to ignore.

After a task has been scheduled, the travel time can be edited in the Task Details.

Note: Travel time cannot be edited in the Task Details dialog box until a task has been scheduled.

To edit travel times from the Task Details dialog box:

1 Right click on the task from the Task Details dialog box.
A popup window is displayed.
2 Select More details.
The Task Detail window is displayed.

3 Select the Operator tab.

Figure 7-9: Task Details — Operator Tab

4 Enter the Travel Time in the Schedule travel time text box.

5 Click ▶ to go on to the next task. When the necessary changes have been made click ✕ to exit.

6 Click **Yes** to save your changes when prompted.

Allocating Tasks Across Commitments

Incidents tickets, Change requests, Request quotes, and their associated tasks can be allocated over commitments (For example, breaks, meetings, shared resource time.) using the Auto schedule and Compact options. When an Incident, Change, Request, or Task is allocated over a commitment, the duration of the commitment is added to the Incident, Change, Request, or Task duration. The Incident, Change, Request, or Task bar in the Schedule window is displayed longer than its actual duration, to account for the time spent on the commitment.

Note: The Schedule spreadsheet, Task Details dialog box, and information box display the actual duration of the Incident, Change, Request, or Task, however, rather than the elongated duration.

When you drag and drop an item which has occupied a space with a prior commitment, the size of the Incident, Change, Request, or Task bar reduces to the original duration.

The following is an example of how an Incident, Change, Request, or Task can be scheduled over a Commitment:

- IM1001 has a percent utilization of 50% and a duration of 1 hour and IM1002 has a percent utilization of 50% and duration of 2 hours. These two Incidents are allocated to operator Kim Dickens with schedule start date as 01/04/99 and start time as 9 a.m..
- Operator Kim Dickens has an Operator Commitment with start date as 01/04/99 and start time as 10 AM and end time as 12 PM.

To allocate PM1002 over the Operator Commitment:

1 Select operator Kim Dickens in the Schedule window.

2 Select the **Compact** option from the **Operations** menu.

The bar of PM1002 starts at 9 a.m. and ends at 1 p.m.. The elongated duration of PM1002 is 4 hours, as the duration of the Operator Commitment is added with the actual duration of the bar.

The following is the Schedule window of Kim Dickens:
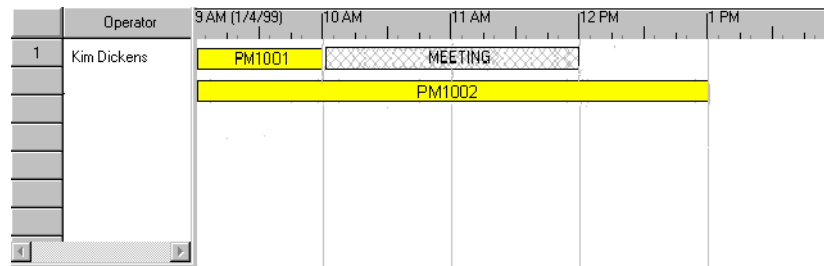
Figure 7-10: Assignment Extending through Commitment

Resource Sharing

Each operator in Work Management is assigned primarily to a manager. This primary manager has to manage and allocate Incidents tickets, Change requests, Request quotes, and their associated tasks to the team of operators. Resource sharing becomes a factor in the scheduling equation when the *primary* manager lends or shares an operator to another manager for a specified period of time. The manager who loans the operator is referred to as the *secondary* manager.

The secondary manager schedules Incidents tickets, Change requests, Request quotes, and their associated tasks to the shared operator during the period of availability of the operator. The secondary manager sees his standard operator as well as the operator shared by the other manager in the Operator pane of the Schedule window and in the Operator dialog box. A visual cue — * — in the Operator pane identifies the shared operator to the secondary manager.

A green hatched bar titled *Not Available* appearing in the Schedule window of the secondary manager indicates the time when the shared operator is unavailable. The secondary manager cannot auto-schedule, drag-and-drop or compact Incidents, Changes, Requests, or Tasks to that shared operator during those periods. A secondary manager cannot lend a shared operator to another manager.

In the Schedule window of the primary manager, a hatched green bar with the secondary manager's name indicates with whom that operator is shared and over what time period that operator is unavailable.

When a shared operator logs in, the system displays a list of managers to whom this operator has been assigned and shared.

This list contains the primary and secondary manager names:

- If the operator wishes to see the Incidents tickets, Change requests, Request quotes, and their associated tasks assigned by the primary manager, selecting the primary manager name displays that schedule.
- If the Operator wishes to see the Incidents tickets, Change requests, Request quotes, and their associated tasks assigned by the secondary manager(s), selecting the respective secondary manager name from the Manager list displays the corresponding schedule.

Sharing Example

The following example provides a practical process of resource sharing. MAX.MANAGER wishes to lend operator JENNIFER FALCON on every day for two hours between 10 a.m. to 12 p.m. for the month of April 2002 to manager ISP ADMIN 3.

To share an operator:

1 Select the Operator name in the Schedule window. For this example, select FALCON, JENNIFER.

2 On the **View** menu, select **Operator Commitment…**.

Operator:	FALCON, JENNIFER					
From date	To date	Weekday	From time	To time	Type	Shared to
3/1/02	4/1/02	Thursday	10:00 AM	12:00 PM	SHARED	ISP ADMIN 3

Notes:

Figure 7-11: Operator Commitment Window

3 Enter a **From date**, for example, 3/1/02

4 Enter a **To date**, for example, 4/1/02.

5 Select *<All Days>* in the **Weekday** field.

6 Enter a **From tim**e, for example, 10:00 AM

7 Enter a **To time**, for example, 12:00 PM.

8 Select a commitment type, *Shared* in this example.

9 Select the manager with whom the resource is to be shared, ISP ADMIN 3 in this example, in the Share to field.

10 Click **OK** to process and schedule the share.

A green hatched bar shown in the MAX MANAGER's Schedule window indicates that JENNIFER FALCON is shared with ISP ADMIN 3 during the specified time.
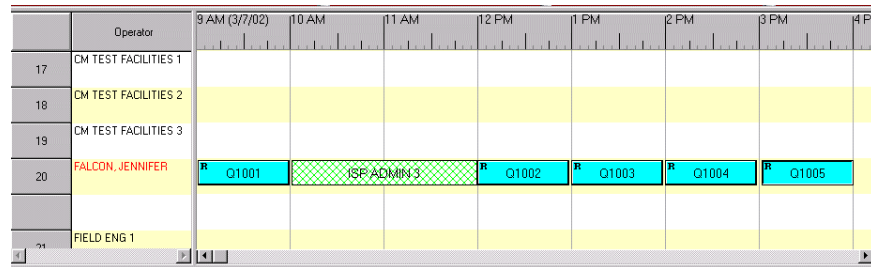
Figure 7-12: Shared Operator as Seen by MAX MANAGER

When ISP ADMIN 3 logs into Work Management, the Schedule window displays JENNIFER FALCON in the Operator pane for the entire month of March 2002. ISP ADMIN 3 can assign Incidents tickets, Change requests, Request quotes, and their associated tasks to Jennifer, but the Schedule time must be between 10 a.m. to 12 p.m.
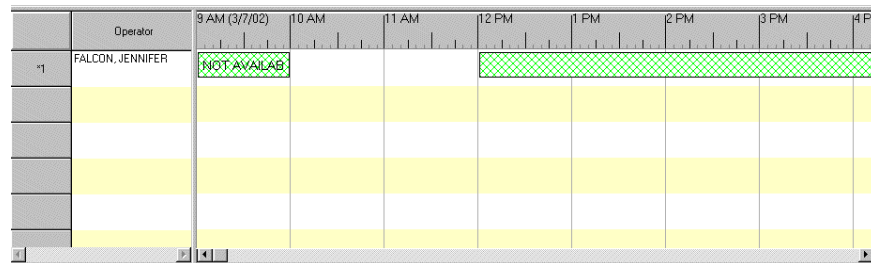
Figure 7-13: Shared Operator as Seen by ISP ADMIN 3

8 Creating Custom Configurations

This chapter describes how to customize Work Management if you are a ServiceCenter administrator or manager. It describes customization options and procedures to tailor the Work Management environment to fit your specific business needs.

Read this chapter for information about:

Introduction

Several aspects of Work Management can be customized to your requirements. These include scheduling options, presentation formats, and modifications to the performance gauges. The options are accessed through the Options menu.

The Options Menu

Menu Item	Definition
Timescale	Opens the Timescale dialog box to allow changing of the timescale. For more information, see *Work Management Time Scale Configuration* on page 47.
Customize	Opens the Customize dialog box to allow changing of system options. For more information, see *Customize...* on page 175.
User-defined Fields	Opens the User-defined Fields dialog box to allow editing of user-defined fields. For more information, see *User Defined Fields* on page 189.
Filters	Opens the filter option controls. For more information, see *Filters* on page 192.
	Contact: Opens Contact filter setup dialog box, where the user specifies which contacts should be known when the Contact dialog is opened. For more information, see *Filtering the Contacts List* on page 63.
	Task Details: Opens the Incident/Change Details filter setup dialog box, where the user specifies conditions which are used to filter Incidents tickets, Change requests, Request quotes, and their associated tasks. Only tickets which satisfy these conditions are displayed in the All Incident ticket Details window. For more information, see *Filtering ServiceCenter Record Items* on page 129.
	Schedule Window: Opens the Schedule Filter dialog box, where the user specifies conditions which are used to control how Incident, Change, Request, and Task data is organized in the Schedule pane of the Schedule window. For more information, see *Filtering the Schedule Window* on page 38.

Each manager can configure the way Incidents, Changes, Tasks, and other pertinent schedule information is displayed. Changes made to the configuration of Work Management are saved with the manager ID. Each time that manager logs into Work Management, the options used are saved for subsequent sessions.

Customize...

Work Management allows you to customize the performance gauges, Incident, Change, Request, and Task summaries, and even the colors associated with different item priorities.

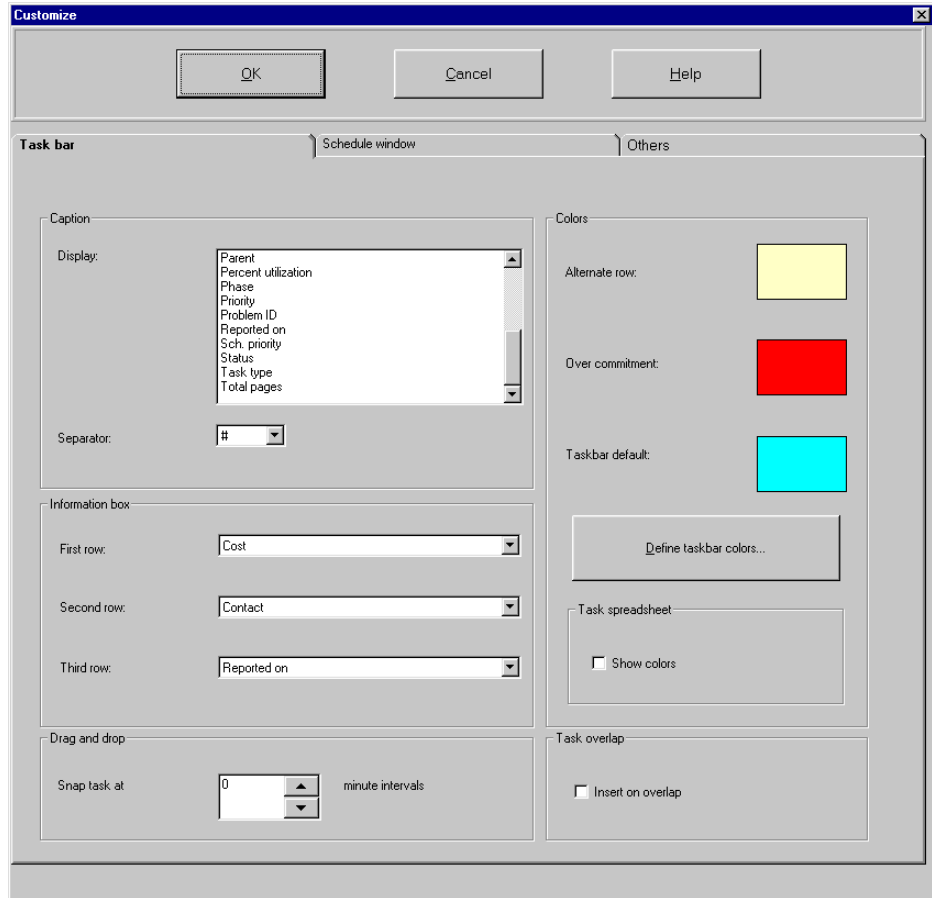### To open the Customize dialog box:

1 Pull down the **Options** menu from the Schedule window.

2 Select the **Customize…**option.

The Customize dialog box is divided into the following tabs:

- The Taskbar tab of the Customize Dialog box affects the appearance of data displayed on the Task bar in the Schedule window, containing the customize options for the bar caption, information box, and bar colors. For more information, see *Taskbar Tab* on page 176.

- The Schedule window tab of the Customize dialog box affects the management of data displayed in the Schedule window, containing the customize options for the priority weightage**s**, overall downtime threshold, gauge panel, utilization figures, and operator list order. For more information, see *Schedule Window Tab on page 180*.

- The Others tab of the Customize dialog box is used to customize background scheduling and knowledge base support. This tab is also used to view how the category duration is calculated and the expertise levels defined by Work Management. For more information, see *Others Tab* on page 186**.**

Taskbar Tab

The Task bar tab of the Customize Dialog box effects the appearance of data displayed on the Task bar in the Schedule window, containing the customize options for the bar caption, information box, and bar colors.

Figure 8-1: Customize Dialog Box — Taskbar Tab

Panels in the Taskbar Tab include:

- *Caption*
- *Information Box*
- *Drag and Drop*
- *Colors*
- *Task Overlap*

Caption

Field	Definition
Caption Display	Displays an identifying piece of information about each in the Schedule Pane. A drop down menu at the right of the field displays a list of options, including *Number, Phase,* and *Reported On.*
Caption Separator	Select a character symbol for demarcating different items of information displayed in the task bar caption.

To change the caption displayed on the task bar:

1 Click the arrow to the right of the combo box.

2 Move through the list of values which appears, using the scroll bar or the directional arrow keys.

The field value you select is displayed on the task bar.

3 Select the information you would like to see in the task bar.

4 Click **OK** to save the changes.

5 Click **Cancel** to ignore them.

The following are item bar captions that can be displayed for each item in the Schedule window:

- Assignment
- Attribute 2
- Brief Description
- Category
- Color
- Contact
- Cost
- Downtime
- Expertise
- Location
- Number
- Parent
- Percent utilization
- Phase
- Priority
- Incident ID
- Reported on
- Scheduled priority
- Status
- Task type
- Total pages

Information Box

The Information box is a small window that appears when the mouse pointer stops on an item (Incident, Change, Request, or Task) bar in the Schedule pane. It displays summary information about each item, including Category, Contact, Reported on and several additional pieces of information, which can be set up from the Customize dialog box.

The Information box displays up to three rows of information about each scheduled Incident, Change, Request, and Task in the schedule. You define here which fields are displayed in the Information box, which appears when

Category:	problem-enterprise.hw
Contact:	HENNESEY
Reported on:	3/11/98,2:17 PM

you leave the cursor on an Incident, Change, Request, or Task in the Schedule pane for several seconds. The system defaults to the following fields in the Information box: Category (including type - Incident, Change, Request, or Task), Contact and Reported On.

To change the fields displayed on the Information box:

1 Click the arrow to the right of the combo box for the appropriate row in the *Information box* area of the Schedule Window tab.

2 Move through the list using the scroll bar or the arrow keys.

The field value for the first row is displayed in the first row of the Information box. The field value for the second row is displayed in the second row of the box, and so on. There are several field options which are tracked in Work Management for each Incident, Change, Request, or Task.

3 Select the information to display in the three rows.

4 Click **OK** to save the changes.

5 Click **Cancel** to ignore changes.

Drag and Drop

Using this feature tasks will automatically be assigned to the nearest specified time segment during drag-and-drop task allocation procedures. For example, assume the value is set to *15* (minutes). If you drag-and-drop a task to 2:10 PM, the task will be *snapped to* (assigned to) the 2:15 PM time slot. If the *snap to* value were set to *60* (one hour), this same task would be scheduled for 2:00 PM. By default no value will appear in this field.
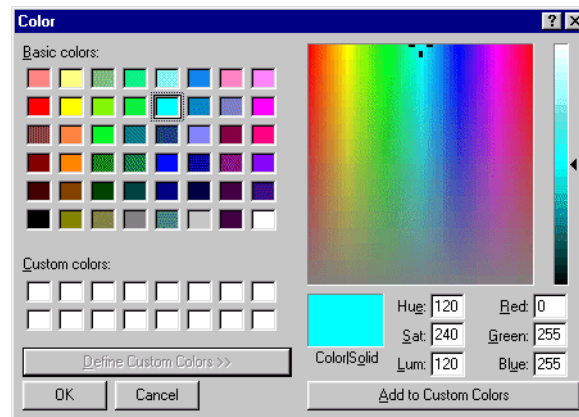
Colors

Allows you to select which colors are associated with different priority levels or with completed Incidents tickets, Change requests, Request quotes, and their associated tasks. Color changes to the item ticket bars on the Schedule window are made in these fields.

To change one of the colors used for the item bars in the Schedule window:

1 Click the appropriate color box.

2 Click the color you wish to use.

3 Click **OK**.

To define a custom color:

a Click the **Define Custom Colors** button.

b Select the desired color by sliding the cursor up or down with the mouse pointer to change the tone or value.

c Move the new color to the main Color dialog box by clicking the **Add to Custom Colors** button.

Figure 8-2: Color Dialog Box

d Click **OK** to save your changes.

The new color appears in the color box on the Task bar tab.

4 Click **OK** to save the changes to the database.

5 Click **Cancel** to ignore changes.

Work Management automatically updates the Schedule window to reflect any changes.

Task Overlap

Selecting this option will shift to the right all scheduled tasks in the Schedule window to accommodate the introduction of a new task where there would not otherwise be sufficient time.

Schedule Window Tab

The Schedule window tab of the Customize dialog box effects the management of data displayed in the Schedule window, containing the customize options for the priority weightages, overall downtime threshold, gauge panel, utilization figures, and operator list order.
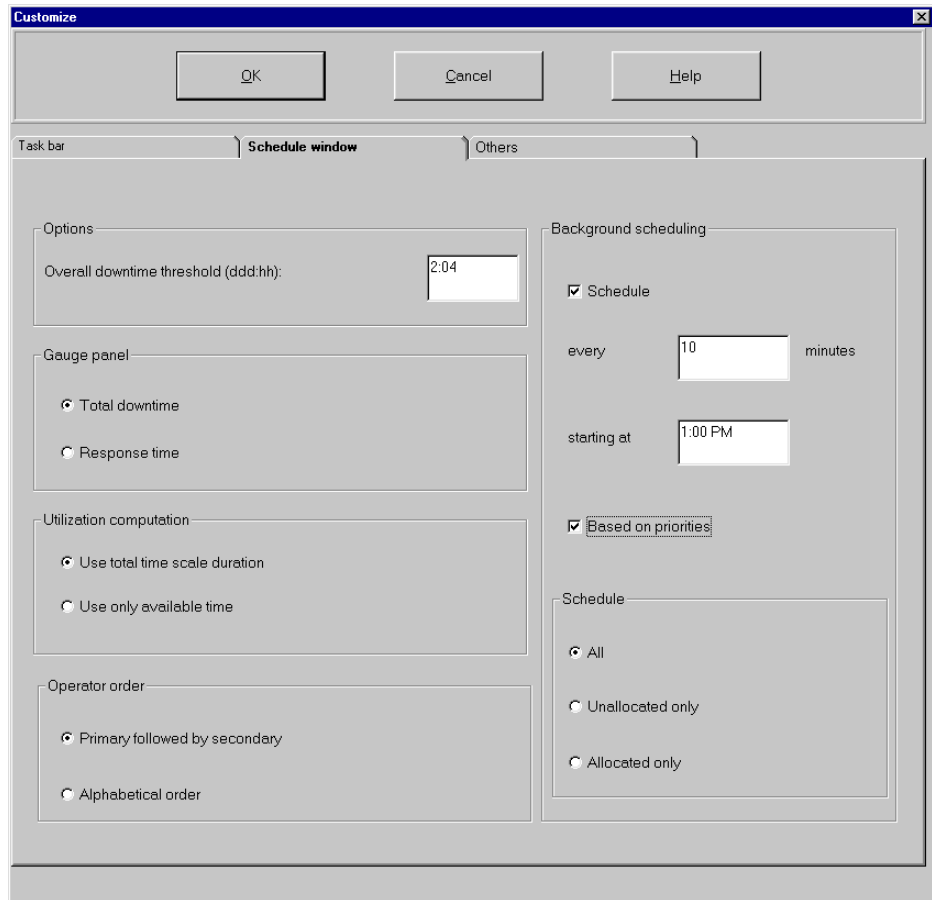

Figure 8-3: Customize Dialog Box — Schedule Window Tab

Panels in the Schedule window tab:

- *Options*
- *Gauge Panel*
- *Utilization Computation*
- *Operator (Sort) Order*
- *Background Scheduling*

Options

Options sets the downtime limit for Incidents tickets, Change requests, Request quotes, and their associated tasks, which is displayed in the downtime gauge. The Overall downtime threshold setting is specific to each manager. The default setting for Overall downtime threshold is 3 days.

Field	Definition
Total downtime	Totals all downtimes for Incidents tickets, Change requests, Request quotes, and their associated tasks in the current schedule, where downtime is the amount of time between being reported and being resolved.
Response time	Shows the average response time for any Incident, Change, Request, or Task on the current schedule; calculated as the difference between the Reported date/time and the Scheduled or Actual Start date/time for all Incidents tickets, Change requests, Request quotes, and their associated tasks in the schedule, divided by the number of Incidents tickets, Change requests, Request quotes, and their associated tasks.

To change the Overall downtime threshold setting:

1 Highlight the field by double-clicking its contents.

2 Overwrite the contents.

Use the format *ddd:hh* for the Overall downtime threshold value.

The default value for the threshold is 3 days. With this default setting, any Incident, Change, Request, or Task that exceeds a downtime of 3 days is highlighted in the Downtime display.

3 Click **OK** to save the changes to the database.

4 Click **Cancel** to ignore them.

Gauge Panel

Gauge Panel allows you to toggle the first gauge on the Schedule window from *Total downtime* to *Response time*. The default setting for this gauge panel is *Total downtime*. The gauge panel selection is specific to the manager logged into Work Management.

The first gauge on the Schedule pane can track either total downtime or response time for incomplete Incidents, Changes, Requests, or Tasks in the schedule.

To change the Performance gauge panel:

1 Click the appropriate radio button to select either **Total Downtime** or **Response Time**.

2 Click **OK** to save the changes to the database. Work Management automatically updates the view on the Schedule window.

Utilization Computation

Utilization Computation options allow a manager to select whether the shared operator appears on a full time scale or one limited by the time that the operator is scheduled to be a shared resource. Operator utilization computation can be changed by selecting one of the options in the table below.

Field	Definition
Use total time scale duration	Calculates operator utilization for the selected timescale duration.
Use only available time	Calculates operator utilization for the availability of the operator.

Operator (Sort) Order

Operator Order options determine how operators are organized in the Schedule Pane, whether they are displayed in alphabetical order or an order based on their resource type. The operator list in the operator pane can be sorted using the options in the table below.

Field	Definition
Primary secondary	Lists the primary operator and than the secondary operator.
Alphabetical order	Sorts both primary and secondary operator alphabetically.

Background Scheduling

Background Scheduling enables the system to automatically schedule Incidents tickets, Change requests, Request quotes, and their associated tasks. Background scheduling also saves any changes to the database as it schedules new Incidents tickets, Change requests, Request quotes, and their associated tasks. The default setting for Background scheduling is to schedule all Incidents tickets, Change requests, Request quotes, and their associated tasks at the current system date and time, every 60 minutes, starting at 12:00 AM, based on the priority of the ticket. Background scheduling can be configured to affect all Incidents tickets, Change requests, Request quotes, and their associated tasks in the *mailbox* and those that have been assigned, through assignment groups, to the manager currently logged in. These Incidents tickets, Change requests, Request quotes, and their associated tasks are scheduled to manager-assigned operators.

Background scheduling enables the system to automatically schedule incoming Incidents tickets, Change requests, Request quotes, and their associated tasks. Background scheduling will also save any changes to the database as it schedules new Incidents tickets, Change requests, Request quotes, and their associated tasks.

The default setting for *Background* scheduling is to schedule all Incidents tickets, Change requests, Request quotes, and their associated tasks at the current system date and time, every 60 minutes.

| Field	Definition
Schedule	Activates the control options for the schedule.
Based on priorities	Determines whether priority of the Incident, Change, Request, or Task is the highest factor in how the Background scheduler assigns items.
Schedule	Defines the criteria for the automatic background scheduling process. **All** affects all Incidents tickets, Change requests, Request quotes, and their associated tasks, including those currently unallocated. **Unallocated only** affects only those Incidents tickets, Change requests, Request quotes, and their associated tasks currently in the *mailbox*, scheduling them to users automatically based on operator expertise. **Allocated only** rearranges the Incidents tickets, Change requests, Request quotes, and their associated tasks that are already in operator queues for highest efficiency.

To activate background scheduling:

1 Open Options > Customize.

2 Select the Schedule window tab.

3 Select the **Scheduling** check box under *Background scheduling.*

   Once selected, the values for **frequency** and **starting time** become available for editing.

   The system defaults to a scheduling frequency of every *60* minutes.

4 To change this value, double-click in the field.

5 Type in the new value.

   The default start time for automatic scheduling is *12:00 AM*.

6 To change this time, double-click in the field.

7 Overwrite the contents, including *AM* or *PM* with the new value. You may also enter the start time in the *24-hour* format.

8 In the Schedule areas, select the appropriate radio button to schedule Incidents tickets, Change requests, Request quotes, and their associated tasks for either all Incidents tickets, Change requests, Request quotes, and their associated tasks; unallocated Incidents tickets, Change requests, Request quotes, and their associated tasks only; or only allocated Incidents tickets, Change requests, Request quotes, and their associated tasks.

- Choosing **All** creates a schedule that blends previously scheduled *Not Started* Incidents tickets, Change requests, Request quotes, and their associated tasks with those in the *mailbox.*

- Selecting **Unallocated incidents only** appends those Incidents tickets, Change requests, Request quotes, and their associated tasks in the *mailbox* to the end of the current schedule.

- Choosing **Allocated incidents only** reschedules those Incidents tickets, Change requests, Request quotes, and their associated tasks that are already assigned and available for viewing in the Schedule window.

9 Click **OK** to save the changes to the database.

10 Click **Cancel** to ignore changes.

Others Tab

The Others tab of the Customize dialog box is used to customize background scheduling and knowledge base support. This tab is also used to view how the category duration is calculated and the expertise levels defined by Work Management.
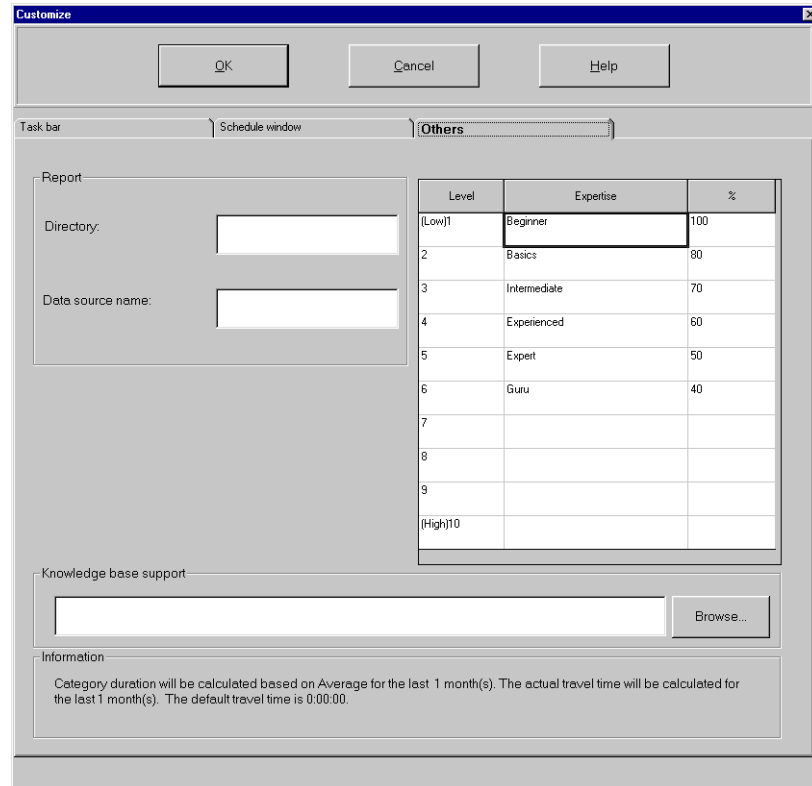
Figure 8-4: Customize Dialog Box — Others Tab

Panels on the Others Tab:

- *Report*
- *Operator Expertise Table*
- *Knowledge Base Support*
- *Information*

Report

Report is used to connect to a report directory (alternative location) other than Work Management's default report directory, enter the directory path and DSN in the appropriate fields.

Operator Expertise Table

The Operator Expertise table identifies the possible levels of expertise for operators. The values are made available in the combo boxes used to define either the minimum expertise of contacts, or the expertise levels of operators. The expertise table has three columns of information with 10 rows maximum of expertise entries.

Field	Definition
Level	Organizes the Expertise Description information from lowest to greatest skill sets, numbered from 1 to 10. These values cannot be changed.
Expertise description	Displays a user-defined name for the skill level. Work Management provides six default descriptions for expertise: *Beginner, Basics, Intermediate, Experienced, Expert* and *Guru.*
%	(Percentage Factor) Defines the relative amount of time required by each levels of expertise to complete a given Incident, Change, Request, or Task. This is based on the principle that a highly skilled operator will complete similar projects faster than a beginner.
	Work Management uses the percentage factor to modify the duration estimates for Incidents tickets, Change requests, Request quotes, and their associated tasks based on the expertise level of the assigned operator, for example, take a change with a duration estimate of 1 hour. If the percentage factor for beginners is 100%, and the percentage factor for experts is 50%, then the duration estimate used by the autoscheduler would remain at 1 hour for the beginner, and drop to ½ hour for the expert.

Knowledge Base Support

Defines the path for any knowledge bases or reference databases to be used with Work Management. The knowledge base is accessed using the Help menu on the Schedule window.

To define Knowledge base support:

1 Enter the full path to the knowledge base. (The knowledge base bundled with Work Management, *WDManager32.hlp*, resides in the ServiceCenter Run directory.) Work Management accepts knowledge bases in a .HLP format.

2 If you are not sure of the path or file name, click the **Browse…** button.

3 In the **Open File** dialog box, select the drive and directory to search.

4 Select **All Files** in the **Format Type** field of the **Open** dialog box to display everything in the current directory.

5 Once you have located the knowledge base, double-click the file.

6 Click **OK.**

The file and its path appear in the field.

7 Click **OK** on the Customize dialog box to save the changes.

Information

Displays the manner in which Work Management calculates category duration. Category duration affects the actual duration calculation tracked by the system. The system default for calculating the actual duration is to take the average of all Incidents tickets, Change requests, Request quotes, and their associated tasks that were completed during the previous one month. The Information box displays the current setting for category duration.

Only the ServiceCenter Administrator can set the duration method to *Average* or *Median. The* default time frame used for calculating the Actual duration is one month. Only those Incidents tickets, Change requests, Request quotes, and their associated tasks that fall within the date range are used to calculate the Actual duration. The ServiceCenter Administrator may also change the time frame to be used for the calculation.

Auto Refresh Tasks allows the user to set up an auto refresh of tasks. User sets the start time and interval at which the tasks will refresh.

The actual duration is calculated using all completed tasks with a category of *actuals data*. Completed tasks for the last *n* months are taken into account for this calculation where *n* is configured as follows.

To Calculate the duration:

1 In ServiceCenter, open the Database Manager Utility from the Toolkit tab on the main menu.

2 Open the wdCustomize form.

3 Search for a record where **wdResourceID** = ADMIN.

4 Change the value in the **wdNumMonths** field to the number of months to be used for category actual duration calculation.

   Note: This is a global setting for all Work Management users and not a user setting.

   Important: *actuals data* can only be entered if ServiceCenter Incident close forms are customized to capture this information and save it to the work table. This requires implementation and does not come with the out of box system.

User Defined Fields

It is possible to change the names of user-defined fields for contacts, operators, and categories. Four data element groups of user-defined fields are available for editing: Incident/Change Details, Contact, Category, and Operator. These groups correspond to the dialog boxes where these fields are available.

To modify these settings:

1 Select **Options** > **User Defined Fields...**

The User Defined Fields dialog box will open.
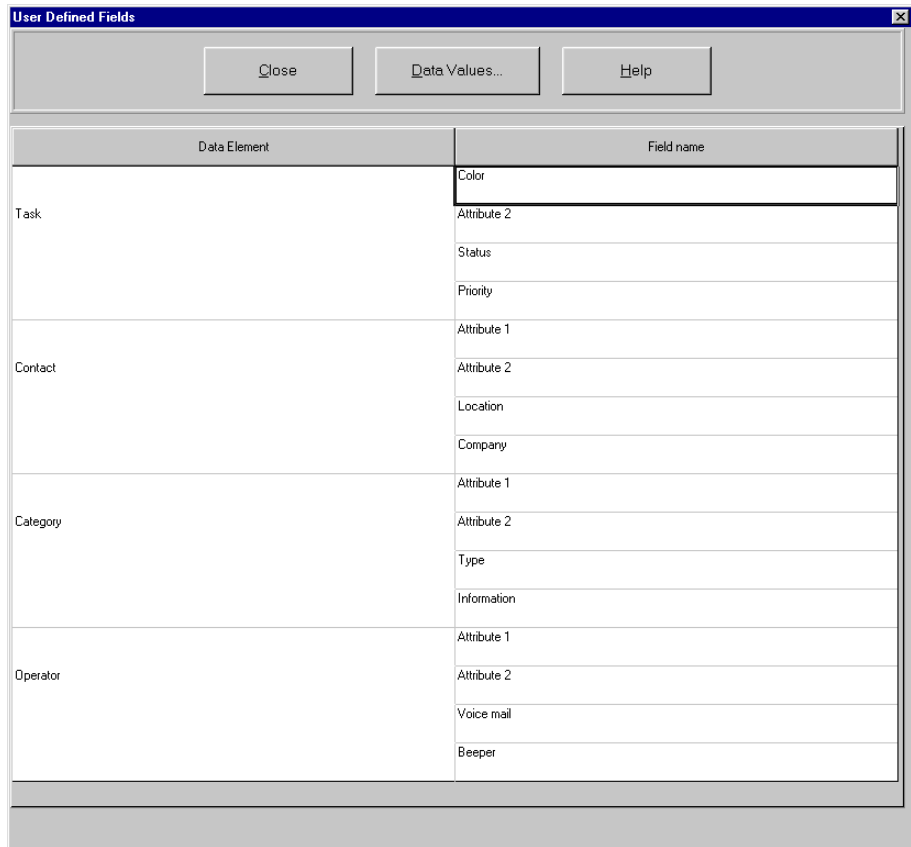
Figure 8-5: User Defined Fields Dialog Box

Element	Definition
Data Element	Identifies to which of the four types of data the associated fields apply.
Current label	Represents the current field heading. Values for Current label field are defined by the system and cannot be edited.
Field name	Allows for modifications to the heading for any of the user-defined fields.
Data Values... (button)	Displays the data values for the first two user-defined fields of each group.

To add, delete, or change data values:

1 Highlight the appropriate **Field Name** cell in the User Defined Fields dialog box.

2 Click the **Data Values...** button. The Data Values dialog box will open.
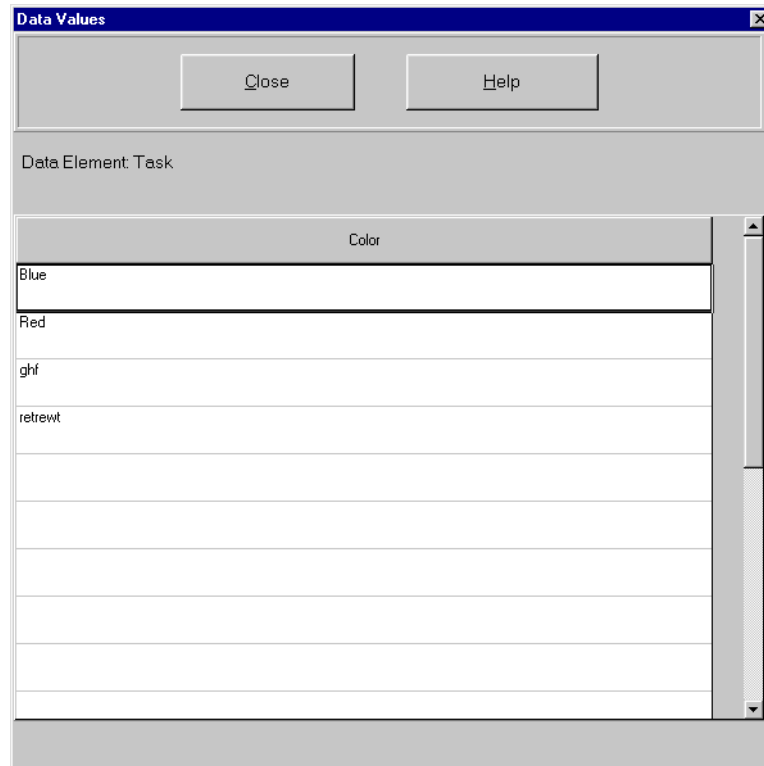
Figure 8-6: Configuring User-Defined Fields

3 To add a new entry, select the first empty field and begin typing.

4 To delete an entry, select the field and press the **Delete** key.

Work Management asks you to confirm the deletion.

5 To edit an existing entry, double-click the field, **to** start the edit mode.

  a Position the cursor to change a value.

  b Make necessary changes or corrections to the value.

6 Click **OK** to save the changes to the database.

7 Click **Cancel** to ignore changes.

Filters

The following filters can be edited.

- *Contact Filters*
- *Incident, Change, Request, and Task Filter Setup*
- *Schedule Filters*
- *Location Filters*

To open a filter for editing:

▶ Select it from the **Options** > **Filters** list.

Location Filters

To customize the Location filter:

1 Select **Options** > **Filters** > **Location** from the main menu. This brings up the Location Filter dialog box.

Figure 8-7: Location Filter Setup

2 Enter the wild card for the **Location name** field.

3 This value is used to determine which contact to display, for example, *
  imports all contacts in ServiceCenter and all their data; A* displays all
  locations whose names begin with A and are followed by any other
  characters.

4 Enter the expected Travel time in the **Travel time** field.

  Your options in the first field include, equals (=), less than (<), greater than
  (>), less than or equal to (<=), greater than or equal to (>=), and greater than
  or less than (<>).

  Enter the days, hours and minutes in the second field.

5 Enter the Actual travel time in the **Actual Travel time** field

6 Click **OK** to accept changes or **Cancel** to ignore.

Schedule Filters

Figure 8-8 shows the Schedule Filter form. For information on using the schedule
filter, see *Filtering the Schedule Window* on page 38.

Figure 8-8: Schedule Filter Setup

Task Filters

Figure 8-9 shows the Incident, Change, Request, and Task Filter form. For more information, see *Additional Record Details on page 128*.

Figure 8-9: Incident, Change, Request, and Task Filter Setup

Contact Filters

Figure 8-10 shows the Contact Filter setup form. For more information, see *Filtering the Contacts List* on page 63.

Figure 8-10: Contact Filter Setup

A Function Reference

This appendix describes Work Management functions during setup if you are a ServiceCenter administrator. It has a quick overview of various key functions or processes used during a standard implementation of Work Management and ServiceCenter.

Read this appendix for information about:

- *Administrator Functions* on page 198
- *Manager functions* on page 203
- *Team Member Functions* on page 205
- *Keyboard Shortcut Table* on page 208

Administrator Functions

Create Managers

Creating managers is done from ServiceCenter.

To create managers:

1 Go to the Administration, Operators form (*operator.g*).

2 If the operator to be defined as a manager already exists, select that operator.

3 If the operator does not exist, create a new operator.

4 In the **Resource Type** combo, pick resource type as **Manager** if this operator needs only managerial capabilities.

5 Pick **Manager/Resource** if this operator is both a manager and an operator.

As both a manager and operator, the manager is able to assign tickets to himself/herself using Work Management.

6 Save the record.

Configure Each Assignment Group

Configuring assignment groups is accomplished from ServiceCenter.

To configure assignment groups:

1 Go to Database Manager.

2 Select the assignment form (*assignment.g*).

3 Select the assignment group to be configured.

4 In the **Manager name** combo, select the manager for this assignment group.

This operator needs to be configured as a *manager*.

5 In **Calendar name**, select the calendar for this assignment group.

6 On the Operators tab, select the operators that belong to this manager/assignment group.

7 Save the record.

Mapping Priority with Status and Severity

Mapping of priority with status and severity is accomplished from ServiceCenter.

To map priorities:

1 Go to Database Manager.

2 Select the *wdPriorityLookUp.g* form.

Work Management ticket priorities can be defined as a combination of severity and status.

3 Select the status from the **status** combo.

4 Enter the **severity** and **priority** values.

5 Click **Add**.

6 Repeat this process for as many combinations of severity and status as need to be defined.

For all combinations not defined in this manner, Work Management assigns a priority of *10* (lowest).

Operator Commitment Types

Operator commitment type is set from ServiceCenter.

To set operator commitment:

1 Go to Database Manager.

2 Select the wdCodeDetails.g form.

3 Enter *90* in the **Code type** edit box.

4 Enter *1* in the **Code ID** edit box.

5 Enter the commitment type as a string in the **Code description** edit box.

6 Click **Add**.

7 Repeat for as many types as need to be defined.

The values in **code ID** have to be unique for each commitment type.

Define Expertise Levels for the Organization

Expertise levels in the organization are defined from ServiceCenter.

To define expertise levels:

1 Go to Database Manager.

2 Select the wdCodeDetails.g form.

3 Enter *98* in the **Code type** edit box.

4 Enter in *1* in the **Code ID** edit box.

5 Click **Search**.

6 If the record is not found, add a new one.

7 Enter the description of the lowest expertise level in the **Code description** edit box.

   The factor in the **Code Description** edit box should be *100* for Code Type=99, Code ID=1.

8 For more expertise levels, enter expertise level and the corresponding factor in the **Code Description string** edit box, for Code Type 98 and 99 respectively, with the same Code ID for each level.

   The Code ID should be unique for each level.

Assign Expertise to Each Operator

Each operator is assigned expertise using Work Management.

To assign operator expertise:

1 Double-click the operator name in the left pane of the Schedule window or go to **View** menu, and select **Operator** and select the operator.

2 Click the **Expertise** button.

3 Double-click an empty row.

4 Double-click to select the category as expertise.

5 Modify the expertise level.

6 Repeat for adding additional category expertise.

7 Click **OK** twice to save the configuration.

   While assigning tickets to operators, Work Management makes operators gray who do not have expertise for a ticket of a particular category, indicating their non-availability of expertise.

Estimate Effort for Each Category

Estimation of effort for each category is done using Work Management.

To estimate effort

1 Go to the **View** menu, and select **Category**.

2 In the **Duration** column, enter the duration for each category.

Tickets of this category default to this duration.

3 Click **OK** to save.

Finalize Color Codes for Priorities

Color codes for priorities is finalized using Work Management.

To choose color codes:

1 Go to the **Options** menu, and select **Customize**.

2 Select the Schedule window tab.

3 Click the colored boxes and select colors for each priority.

4 Click **OK** to save.

Tickets on the Schedule window will be color-coded based on these settings.

Information Box Options

This is done using Work Management.

To select information box options:

1 Go to the **Options** menu, and select **Customize**.

2 Select the Schedule window tab.

3 In the Information box section, select the data element that you want to see in the information box.

The Information box is displayed as a popup when the mouse is moved over a ticket on the Schedule window.

Threshold Definition

This is done using Work Management.

To define the threshold duration:

1 Go to the **Options** menu, and select **Customize**.

2 Select the Schedule window tab.

3 Define the overall downtime threshold duration.

The downtime display option and the threshold gauge on the Schedule window use this threshold to filter tickets.

User Defined Fields

This is done using Work Management.

To define User defined fields:

1 Go to the **Options** menu, and select **User defined fields**.

2 You can edit labels and define values for the first two user defined fields for operator, ticket, category and contact.

3 You can only edit the labels for the other two user defined fields.

These values appear in a combo box in the operator, incident/change/task, contact, and category dialogs and you can filter using these in the contacts and all incident/change/tasks dialogs.

4 Click **OK** to save.

Integrating with MS Outlook

The settings for integration with MS Outlook are established from ServiceCenter.

To integrate with MS Outlook:

1 Go to Database Manager.

2 Select the wdCustomize.g form.

3 Enter ADMIN as the **wdResourceID**.

4 Set the **wdReadOutlook** field to *1* to enable MS Outlook integration, and *0* to disable MS Outlook integration.

5 To display the subject as the bar caption, set the **wdTaskBarCaptionID** field to *0*.

Setting this field to *1* displays *Not defined* as the caption for the MS Outlook appointments displayed in the Schedule window.

Manager functions

View Workload

This is done through Work Management. You will be able to view all Incidents tickets, Change requests, Request quotes, and their associated tasks assigned and unassigned in your assignment group.

Unassigned Incidents, Changes, Requests, or Tasks appear in a mailbox.

To view the workload:

1 Click the mail box gauge to open or close the mailbox.

By default the system displays the schedule for the current date.

2 To change this time scale, double-click the time scale bar or select the **Timescale** option from the **Options** menu.

The bottom spreadsheet displays details of Incidents tickets, Change requests, Request quotes, and their associated tasks.

3 To view more details, select the Incidents, Changes, Requests, or Tasks on the spreadsheet or on the Schedule window.

4 Double-click or right-click to produce a shortcut menu.

5 Select **More details**.

6 Move mouse over the Incident, Change, Request, or Task on the Schedule window to see a popup information box.

7 To view only locked tickets or tickets above the downtime threshold, select **Schedule** from the **View** menu.

Assign Incidents, Changes, Tasks to Operators

This is done through Work Management.

To make assignments:

1 To assign an Incident, Change, Request, or Task to an operator from the mailbox or to reassign from one operator to another, drag the item to the operator.

2 Drop the Incident, Change, Request, or Task on the Schedule window.

3 To unallocate an Incident, Change, Request, or Task, select the ticket and select **Unallocate** from the **Operations** menu.

4 You can also assign a ticket by right-clicking on the ticket on the Schedule window or spreadsheet, which produces a shortcut menu.

5 Select **More Details.**

6 On the Operator tab, select the operator that you want to assign the ticket to.

7 Right-click to bring up the shortcut menu, and select **Replace** to save.

Refresh/Save Schedule

This is done through Work Management.

All changes to the Schedule window are saved only when you click the **Save** option from the **Schedule** menu.

Any changes in the Incident/Change Details dialog are saved only when you right-click to reveal the shortcut menu, and select **Replace**.

To view changes made by other users or to refresh the mailbox, click **Refresh** from the **Schedule** menu.

Compact Incident Tickets

This is done through Work Management. This function brings all tickets up to display within the current timescale. All tickets scheduled before or after the current timescale are not visible until you select **Compact** from the **Operations** menu.

You can compact the entire schedule or just the schedule for one operator. Compact prompts you whether to compact *time* and *operator locked* tickets.

Locking Incident Tickets

This is done through Work Management.

To lock Incident tickets:

1 Select **Lock** from the **Operations** menu.

A submenu with two lock options appears.

2 The **Operator lock** option locks the ticket to the operator.

The auto schedule function will not reassign this ticket but can reschedule it. This can also be used as a visual indicator to ensure a ticket is not re-assigned to another operator.

3 The **Operator and time lock** option locks the ticket to a particular scheduled time.

The auto schedule function will not reassign or reschedule this ticket. This can also be used as a visual indicator to denote committed client appointments.

Automatic Background Scheduling

The goal of the automatic scheduler is to optimize resource utilization. This is done through Work Management.

To start background scheduling:

The automatic scheduler allocates tickets to individual operators based on the following criteria:

- Availability of operators
- Expertise levels of the operators
- Priority of the Incident ticket/change/task
- Age of the ticket

Minimize Organizational Downtime

This is done through Work Management. You can also set an option to instruct the system to schedule tickets at regular intervals. This option can be set by selecting the **Customize** option from the **Options** menu.

Team Member Functions

View Schedule

This is done through Work Management. You can view only tickets assigned to you and all unassigned tickets in your assignment group. Unassigned tickets appear in a mailbox.

To view the schedule:

1 Click the mail box gauge to open or close the mailbox.

By default the system displays the schedule for the current date.

2 To change this time scale, double-click the time scale bar or **Timescale** option from the **Options** menu.

The bottom spreadsheet displays details of tickets.

3 To view more details, select the ticket on the spreadsheet or on the Schedule window.

4 Double-click or right-click, then select **More details** from the shortcut menu.

5 Move the mouse over the ticket on the Schedule window to see a popup information box.

6 To view only locked tickets or tickets above the downtime threshold, select **Schedule** from the **View** menu.

Define Commitments

This is done through Work Management.

To define commitments:

1 Select **Operator Commitment** from the **View** menu.

2 Enter the dates and type of commitments.

3 Click **OK** to save.

Commitments appear as blocked time in the Schedule window and cannot be moved.

Update Ticket Status

To update ticket status:

1 Double-click a ticket on the bottom spreadsheet or Schedule window.

2 Update or close the ticket using the ServiceCenter form.

3 Click **Save** to save.

Work on Unassigned Tickets

This is done through Work Management.

To work on unassigned tickets:

1 Double-click a ticket in the mailbox.

2 Update or close the ticket using the ServiceCenter form.

3 Click **Save** to save.

4 Drag and drop the ticket to the Schedule window to assign the ticket to yourself.

Filters for Contact Dialog

This is done through Work Management.

To change filters:

1 To change filters while you are in the Contact dialog or Incident/Change, Details dialog, right-click to reveal a shortcuts menu.

2 Select **Filters**.

3 You may also select **Filters** from the **Options** menu to change the filter settings.

Spreadsheet Defaults

This is done through Work Management. The columns in the bottom spreadsheet can be resized or completely hidden.

Colors in the Spreadsheet and Mailbox

This is done for Work Management.

To edit colors:

1 To view colors in the mailbox and spreadsheet, open workmgmt.ini in your windows directory.

2 Go to the [Colors]section and set ShowColors=1.

Mailbox Sort Options

This is done through Work Management.

To select options:

▶ Right-click the mailbox to view the sort options. Tickets will be sorted based on these selections.

Count and Utilization Columns

1 Right-click either of the columns, to reveal a shortcut menu.

2 Click the column which is to be displayed.

Only the column options which have a tick mark are displayed.

Keyboard Shortcut Table

Many of the menu commands in Work Management can be accessed using keyboard short cuts or accelerator keys. The following table lists the accelerator keys currently available.

Key	Alt	Ctrl
A	Accesses the Compact for All the Operators command from the Operations menu in Work Management.	---
B	Selects the Brief Description field on Incident, Change, Request, or Task page.	Accesses the Incident/Change Filter screen.
C	Selects the Completed field on the Operator page.	Copy.
D	Selects the Reported date in the Contact page.	---
E	Selects the Operator in the Operator page.	Accesses the Replace command on the Incident ticket menu. The Incident/Change menu is available when the Incident/Change Details dialog is open.
F	---	Accesses the Apply Filter command on the View menu.
H	Accesses the Help menu. Selects the Scheduled Start date field on the Operator page in the Incident/Change Details dialog box.	Selects the Highest Priority on the Operations menu.
K	---	Accesses the Operator & time lock command on the Operations | Lock menu.
L	---	Accesses the Operator lock command on the Operations | Lock menu.

Key	Alt	Ctrl
M	Selects the Assignment group in Contact page.	---
N	Selects the Contact on Contact page.	Accesses the New command on the Incident/Change menu. The Incident/Change menu is available when the Incident/Change Details dialog is open.
O	Selects the Category on Contact page; Accesses the Operations menu.	---
P	Selects the Total pages on Contact page.	---
R	Accesses the Compact for the current operator command on Operations menu.	Accesses the Refresh command on the Schedule menu.
S	---	Accesses the Save command on the Schedule menu.
T	Selects the Action on Contact page.	Accesses the Contact filter on the Options menu.
U	Selects the Actual date/time on Operator page.	Accesses the Unallocate command on the Operations menu.
V	Accesses the View menu.	Paste.
W	---	Accesses the Schedule Window Filter on the Options menu.
X	Selects the Expertise level in Contact page.	---

B Microsoft Outlook Integration

APPENDIX

This appendix was designed to aid the ServiceCenter administrator, manager, or user in integrating Microsoft Outlook with Work Management. It explains how to load Appointments for all operators belonging to a manager from the Microsoft Outlook calendar into the Work Management Schedule window.

Topics in this appendix include:

- *Overview* on page 212
- *MS Exchange Server and Client Set Up* on page 212
- *Granting Review Rights* on page 213

Overview

Appointments for all operators belonging to a manager can be loaded from Microsoft Outlook calendar into the Work Management Schedule window. These appointments are then displayed as blue hashed bars in the Schedule pane.

For integrating appointments and events from Outlook with Work Management, a Microsoft Exchange Server has to be setup and all Work Management users must have accounts on this server.

Each team member must create a profile to log into MS Outlook. The team member then must grant *reviewer* permission to the manager, so the manager can view the appointments set for the required operators. The subject of the appointments or events is displayed as the bar caption instead of the number of Incidents, Changes, Requests, or Tasks.

MS Exchange Server and Client Set Up

To set up the Microsoft Exchange Server and Clients:

1 A Microsoft Exchange Server should be setup and all Work Management users should have accounts on this server.

2 MS Exchange clients should be setup at each user's desktop.

3 Profile names for each team member must be created on the client side.

4 Each team member has to grant *Reviewer* permission to his manager to be able to view the appointments set in his calendar folder.

5 Once the team member is granted *Reviewer* rights to his manager, he is all set to use Outlook to set up the appointments for training programs, status meetings, company meetings, etc. in the various time slots of the Calendar. These appointments will be displayed by Work Management in the Schedule window.

Appointments will be displayed as blue hashed bar in the Schedule window, similar to off-hour commitment bars, and the subject of the appointments or events is displayed as the bar caption.

Granting Review Rights

To grant review rights:

1 Login to Outlook.

2 Right-click the Calendar folder.

A short-cut menu is displayed.

3 Choose **Properties**.

4 In the Calendar Properties dialog box, go to the Permission tab.

5 Set the name of the manager reviewing the list, as well as the group managers, secondary managers and team members.

6 Set the **Role** as *Reviewer*.

Marking Events and Appointments Private

When a user marks an appointment or event as *Private* in Outlook, Work Management displays these appointments and events as a commitment bar, but the appointment/event subject is not provided as the bar caption. The system displays *Private* instead as the caption.

To mark items as private:

1 Login to Outlook.

2 Right-click the Calendar folder.

A short-cut menu is displayed.

3 Choose **Calendar**.

4 Select the **New Appointment** or **New Event** option.

The **New appointment** or **New Event** dialog appears.

5 Enter the new appointment or event.

6 Select the **start date and time** and **end date and time**.

7 Click **Private**.

The following is a sample Schedule window with Outlook appointments and events.
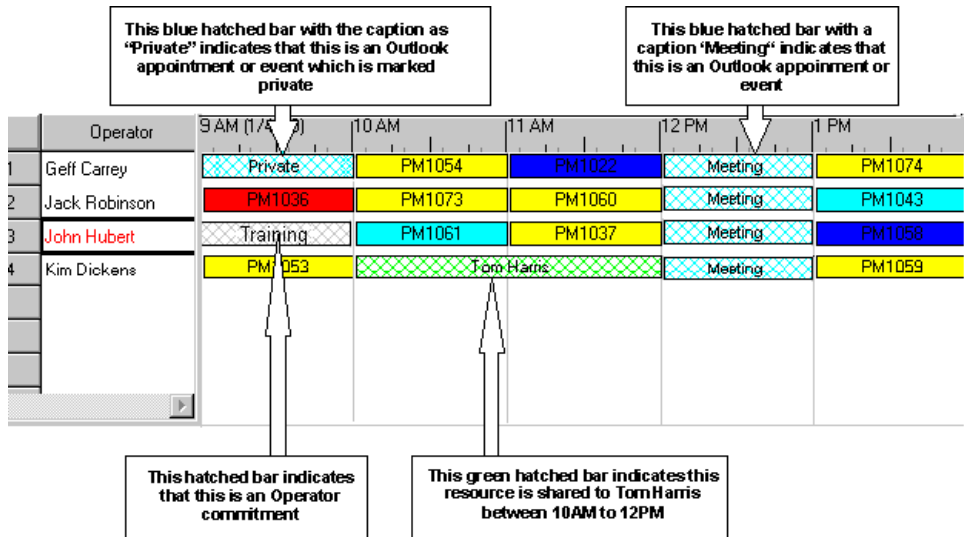
Figure B-1: Outlook Appointments

C Work Management Tables

APPENDIX

This appendix lists the tables used by Work Management that assist the ServiceCenter administrator who is setting up Work Management. Work management uses tables to contain data and communicate with ServiceCenter.

Read this appendix for information about:

- *Service Center Tables* on page 216
- *Work Management Tables* on page 216

Service Center Tables

The following ServiceCenter Tables are used by Work Management

Table	Function
assignment	Contains mail groups
caldutyhours	
calholidays	
contacts	
location	
operator	
work	Contains all task information to be read by Work Management. Task information is transferred, when required, from the SC table. For example, in probsummary, cm3t, cm3r, ocml, ocmq, etc. using triggers, links and applications.

Work Management Tables

The following tables are created and used by Work Management for ServiceCenter.

Table	Function
wdCategory	Contains all category information (transferred from the SC table. For example, category, or cm3tcategory, etc. using triggers, links and applications.)
wdCodeDetails	Contains code pertaining to certain Work Management functions, as well as label information, user defined fields, resource commitment types, and expertise types and percentages
wdColors	Contains color definitions for various areas of Work Management (including task bars, rows, and priority definitions), associated to resources (Will be updated by Work Management)
wdCustomFilter	Contains custom filter criteria defined for Work Management. (Internal, not to be edited.)

Table	Function
wdCustomize	Contains customize information as defined in Work Management. An imported record contains default (ADMIN) settings for all users which can be edited in initial Work Management configuration.
wdCustomReports	Contains customized report definitions for reports viewing in Work Management (Internal, not to be edited.)
wdCustomSections	Contains customized report data as defined in Work Management (Internal, not to be edited.)
wdDependency	Contains dependency information for tasks as defined in Work Management (predecessor - successor relationships) (Will be updated by Work Management)
wdOffHours	Contains resource commitments defined in Work Management (meetings, vacations) (Will be updated by Work Management.)
wdPriorityLookUp	Contains a matrix that defines priority for tasks in Work Management, based on combinations of values from two implementation-defined fields
wdResExp	Contains resource expertise definitions (with varying levels of expertise associated to categories for each resource) (Will be updated by Work Management)
wdResHierarchy	Contains a hierarchy of resources, managers, and group managers for the corresponding Work Management views available
wdSCFDefinition	Contains Supply Chain Factors definitions for use within Work Management as service provider-defined criteria for scheduling
wdSchFilter	Contains filter definitions created in Work Management for the use of the Schedule Filter (which filters the tasks displayed in Work Management based on certain criteria) (Will be updated by Work Management)
wdSchOptions	Contains options defined in Work Management for the use of the Background Scheduling function (Will be updated by Work Management)
wdShowContact	Contains the labels of the fields, which you can customize, that appear in the Show Contact popup invoked by a right-click over a task in Work Management. The default data consists of out-of-box label definitions which match up with fields defined in the imported field mappings

Table	Function
wdSLADefinition	Contains Service Level Agreement definitions, for use within Work Management as customer-specific service level criteria for scheduling
wdTauCounter	Contains counters for adding tables. (Internal, not to be edited.)
wdWROption	Contains options for the use of the WorkRequester function in Work Management (Will be updated by Work Management)
wdMapFields	Contain mapping information for each field it need to connect to (Internal, not to be edited.)
wdMapTables	Contains a list of all tables used by Work Management (Internal, not to be edited.)

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