Part Number 862100 - Aegis Help Desk

Aegis Help Desk is a full-featured help desk, issue management, and asset management product suite. This integrated functionality helps companies to manage administrative and communication tasks associated with providing customer, information technology (IT), or product support.

VERSATILE, CONFIGURABLE - YOUR UNIQUE SOLUTION.

Aegis Help Desk's networked view of customer, product and service information enables support teams to work effectively to provide timely, and accurate responses to customers.

This product suite supports the functions of a customer support oriented center. The Aegis Help Desk product suite will deliver a web-based support solution that encompass the following:

- Linking customer contact information to trouble ticket and incident service history;
- Enabling rapid inquiry handling and accurate order entry;
- Providing trouble ticket management capabilities that includes opening, routing, analyzing, correlating, tracking, escalating and closing of trouble tickets, and which also improves the overall trouble report tracking and coordination;
- Automatic creation of new trouble tickets and populated information from support requests submitted from your website and forwarding of these requests to generic or specific members of the support team;
- Asset management capabilities including tracking asset allocations, components, service history and support calls for each asset;
- Calculation of support service cost;
- Providing user and customer access through Aegis' web interface. AegisWEB, a component capability that is supplied with Aegis Help Desk and Aegis Defect Tracking, provides the ability for support users and their customers to access using Internet Explorer. Client web-based access provides convenience and reduces dependability on the location of the installed system;

- Permitting the logging of support requests, use of knowledge bases and faq lists by a customer or internal client;
- Automate timely delivery of critical information (management reports) by sending to a printer, creating as files, or e-mailing to recipients on a fixed schedule;
- Automate escalation of requests that had not fulfilled response time levels to better meet customer commitments;
- Providing robust reporting tools and management reports to analyze trends and work loads; and much more.

And because support processes and support information are unique, we have built Aegis Help Desk to be unique for your support solution also. We enable you to customize user interfaces, support forms, data entry forms and more, to capture information how you need it, all without programming effort. Or simply use the setups we provide you.

Aegis Help Desk's customizable attributes make it easy to tailor information and enhance the work flow in your support process.

FEATURE DESCRIPTION

INCIDENT REPORT MANAGEMENT
- Log and classify each incident by Call Type, Severity, Priority and other attributes (including ones that you define).
- Record an overview of the incident or the full details including error messages and the surrounding circumstances. You can also attach external files such as faxes, log files and screen dumps to each incident.
- Record any number of responses to an

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incident as the incident progresses to some end-status. Instantly review the history of responses to a selected incident.

- Record release notes for an incident. Relevant release notes can be extracted and printed when a new version of your product is released.
- Allocate a call to a user or a group of users. Use the Call Queue to quickly view who is working on what and easily reassign calls. The Call Queue window shows the total number of new, open, closed and escalated incidents, and the total number of responses. You can also define your own queues. You can directly pick up and re-assign a call to another user while in the Call Queue.
- Estimate the time and amount spent for each incident and let Aegis Help Desk calculate the actual time and amount spent. Track the total cost and time spent to resolve a problem.
- Use workflow to automatically reassign a call when the status changes from one state to another. Workflow is fully configurable based on call type.
- Track how a call will impact on other areas and schedule tasks to be performed before work commences on a call or after it is resolved. · Track parts used to resolve an incident and the total cost of parts used.
- Link common incidents together.
- Attach an unlimited number of files to each call.
- Use Job Responses to show total number of new, open, closed and escalated incidents and also total number of responses for a given date range.

AUTOMATIC NOTIFICATION

Automatically notify clients and internal users of any changes. You can customize the message being sent by inserting system directives, fields from the database or other free form text. This allows you to create a more personalize message for each notification type. Two levels of notifications are provided; record level and field level notifications.

- With record level notification, you can define the appropriate clients and user to notify when a new incident is added, edited, copied or deleted. The notification is based on changes to a record.
- With field level notification, you can define the appropriate clients and users to notify when a field is changed or when a field equals a defined value. The notification is based on changes to a field on a record. For example, you can automatically notify the QA team or client when the status of an incident is resolved or notify the user to whom you allocated the incident to for resolution.
- Support for external e-mails.

KNOWLEDGE BASE

A fully searchable knowledge base with resolution histories. Automatically create a knowledge base from the incident records you add. Over a period of time, you can build up a knowledge base of common problems and also a resolution history. Aegis Help Desk will automatically generate the Article number for each knowledge base.

- Resolve incidents quickly using the fully searchable knowledge base with resolution histories.
- Draw on the knowledge of all team members.

CLIENT MANAGEMENT

Create an unlimited number of contacts for each client. Store all your client information in one central location.

- Easily generate phone list, mailing list, e-mail list, contact list and any other list from your client database.
- Record client activities/correspondences.
- Record client feedback.
- Create Client invoices and quotations. Automatically convert a quote to an invoice.
- Record offers made to clients.
- Record products purchased by clients.
- Record sales opportunities.

BROADCAST MESSAGE

Broadcast messages via e-mail to your clients or internal users. You can also merge data from your database to create a personalized message. You can also include attachments in the e-mail.

- Quickly and easily notify your clients via e-mail of new products or fixes for your existing products without the time consuming task of sending out letters.
- Broadcast message to clients on a special offer.

ASSET MANAGEMENT

The asset management component keeps all your asset data in one place and allows you to track asset allocations, components that make up an asset, asset service history and support calls for each asset.

- Define the components that make up an asset and track the total cost for each asset. Automatically calculate the total cost of an asset as you add/edit components for an asset.
- Easily allocate an asset to a user and or a client and re-allocate it when necessary.
- Track asset service history and the total service cost for each asset.

MANAGEMENT REPORTS

Comprehensive reporting tools and graphing capabilities.

- Print a variety of reports. For example, how long it took to resolve an incident, how old is an incident, when is the last response date for an incident, the estimated, actual and variance of time and cost for each incident. You can also select the fields you want printed, specify a filter to select the required records and how the report should be sorted. This feature gives you an unlimited view of your data.
- Graph your data to look at how calls are distributed and analyze trends. See the big picture at a glance with Distribution and Trend graphs.

INCIDENT FILTERS, VIEWS, SORT FIELDS AND CELL STYLES

Use filters, views and sort fields to show you the records you want to see in the form you need to see it in.

- Filters are a powerful facility that allows you to do exactly that – a filtering of database information to view selected records only. As you add records and your database becomes bigger, it becomes more difficult to locate the records you are interested in. For example, you may want to look at only calls that have not been allocated to the development teams for resolution, or enhancements requested by your clients, or all clients in a given country.
- Filters can also be used in reports, graphs, import, export, broadcast message and mail merge operation.
- Views allow you to select specific fields to be displayed on the grid on the main window. You can also attach a filter, sort fields and cell style to a view.
- User defined sort fields allow you to sort your records by more than one field. For example, you can sort your records by Reference # in ascending order, followed by Status in descending order and Call Type in ascending order.
- Cell style allows you to highlight records based on the value of a field. For example, if Priority is Low, set the color to green, if High, set it to red.
- Network ready for multi-user environment

CUSTOMIZED FORM DESIGNER

Use the program as supplied or change it to work your way. Set up your own databases, the way you want them. Change your view of information, define field names and attributes, attach a list box to a field and use the form designer to design your own window – you name it. Each field is fully configurable.

- Form designer. Hide fields you don't need, move fields around by dragging and dropping them to a new position and specifying the tab order of each fields.
- Configurable field properties let you define field names, compulsory fields, attach list boxes (look up) to fields and provide default values.
- Incident and asset number can be generated or user defined. If you select to have the reference number generated, you can specify the parts that make up the reference number to suite your needs.

OPTIONAL ADD-ON MODULES

The following optional add-ons are available for Aegis Help Desk.

- E-mail Server
- Escalation
- Report Scheduler
- System Alerts
- Workstation Audit
- Database Monitor

AND MUCH MORE...

- Interface to external e-mail systems
- FAQ
- Full security control
- Record templates, auto complete and populate options for quick and accurate data entry
- Unlimited number of databases
- Data import and export
- Group update and delete
- Configurable audit history
- Create unlimited user groups
- Full security control
- Option to change colors used for grid, headings, scroll buttons, compulsary fields, list bars, contact fields and more
- Option to change field names, hide and rename folders
- Option to create list boxes and list box values, and add these list boxes to almost any field
- Mail merge with Word documents
- Define your own list boxes and values (lookups)
- Product inventory

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- Track competitors
- Track cost centers, custodians, locations, manufacturers, service providers and suppliers
- Track staff training history
- Record staff's internal and external charge rates for costing
- Reminders to remind you of due dates or other important dates
- Copy record to clipboard Network ready for multi-user environment

SPECIFICATIONS

CLIENT
- Pentium II or higher with 32 MB memory and 50 MB disk space.
- Windows™ 95/98/Me or Windows™ XP/2000/NT 4.0 (with Service Pack 5 or higher)

SERVER
- Pentium II or higher with 32 MB memory and 50 MB disk space.
- Pentium II or higher with 128 MB memory and 100 MB disk space.
- Windows™ 95/98/Me or Windows™ XP/2000/NT Workstation, Windows™ 2000/NT Server 4.0 or higher (recommended).

DATABASES
- MS SQL Server or Access

WEB FRONT END (if used)
- Pentium II or higher with 256 MB memory and 100 MB disk space, plus room for your data. 20 MB total disk space for moderately sized database is reasonable.
- Windows NT 4 (Workstation or Server) with Service Pack 6a or Windows 2000 (Professional, Server or Advanced Server) with the latest Windows service pack and critical updates available from the Microsoft Security Web site or Windows XP (Home or Professional)
- Internet Information Services (IIS) Version 5.0 or later on the web server.
- Internet Explorer 5.01 or later on the web server and on each client PC.
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ORDERING INFORMATION

P/N 862100 Aegis Help Desk

Add-On Module Options (priced per server)
- P/N 862171 E-mail Server
- P/N 862172 Escalation Server
- P/N 862173 Report Scheduler
- P/N 862174 System Alerts
- P/N 862175 Workstation Audit
- P/N 862176 Database Monitor

Other Options
- Concurrent License or
- Dedicated License
- Client Web Access (priced per user)