



Close Support Service Desk v 3.00

Upgrade Guide

© Close Fit Software Ltd 2010

Table of Contents

Part I Upgrading from version 2.95	2
1 Prerequisites	2
2 Potential version conflicts	3
3 Installing Close Support Service Desk version 3	3
4 Launching the Service Desk	6
5 Rolling out version 3	7
Part II New features	8
1 Look and Feel	9
2 The Service Desk screen	11
3 Configuration Files	14
4 Team Working	15
Support Levels	15
Support Teams	17
5 User Photos	20
6 Active Directory and User Records	21
7 Spell Check	25
8 Auditing	25

1 Upgrading from version 2.95

As an existing user of Close Support, this document provides you with the guidance you need to upgrade from version 2.95 to version 3.00.

Please review all information carefully.

At version 2.95 the Close Support Desktop came in two versions, Standard and Advanced. At version 3 we have renamed the application to Close Support Service Desk (CSSD) and removed any distinction of versions.

Existing customers with a valid support and maintenance agreement are able to upgrade to version 3 at no cost.

Existing users of the Standard Desktop will benefit from additional functions of document linking, knowledge base, search exports and standard email paragraphs. All new features listed in this document are also included except for the auditing module.

Existing users of the Advanced Desktop will benefit from all the new features in CSSD including the Audit Module.

1.1 Prerequisites

Close Support Service Desk version 3 is a Windows application that has been tested on Windows XP, Windows Vista and Windows 7. It will also run on Windows NT and Windows Server 2003 and above.

Workstation requirements:

- MS Windows XP, Vista or 7
- Minimum 1024 x 768 screen resolution
- 180MB disk space
- Minimum 2GB RAM recommended
- POP3/SMTP email account for the optional generation of emails

Network requirement:

- For multi-user operation all users will require full modify access to a network share where the back-end database (MS Access .mdb file) is stored.

Optional requirement:

- MS SQL Server 6.5/7/2000/2005/2008 for the SQL Server option. Note that SQL Server Express Edition can be used. The transfer of tables from the provided MS Access database to SQL Server can be done in a number of ways. One way is to use the MS Access to SQL Server Upsizing Wizard. The wizard is provided by Microsoft as a function within MS Access 2003.

Please note that this version of Close Support will install the MS Access 2003 runtime files. The application will co-exist with other versions of MS Access that you may have installed on your workstation.

Before commencing the upgrade to version 3 from version 2.95 please ensure you have:

- **Downloaded the software.** Please visit www.closefitsoftware.com/beta and download the file `cssd_setup.exe` (67MB).
- **Received your software key.** Close Fit Software will send you a small text file, `key.ini`. The file contains details of your software key. It is used to unlock the functions in the Close Support

Service Desk that you are entitled to use. Without this file the software will function in "Express Edition" mode.

- **Located your current local settings file.** Versions prior to this one used the file CS1clSett.dat to store Close Support configuration information specific to the workstation, such as email account settings. Version 3 uses a different method to store the same information. There is a one-off process that runs the first time Close Support Service Desk is run on a workstation that reads the information from CS1clSett.dat if it is in the installation folder. This is optional. You can always set your Workstation Settings from the application in Tools, Options.
- **Taken a safe backup copy of your production database.** You will be using the MS Access database CloseSupportBE.mdb or the SQL Server database CloseSupportSQL. Before connecting the version 3 application to your production database you must ensure that you have a safe copy of the database. Close Fit Software cannot accept any liability for loss or corruption of data during or as a result of the upgrade process.

1.2 Potential version conflicts

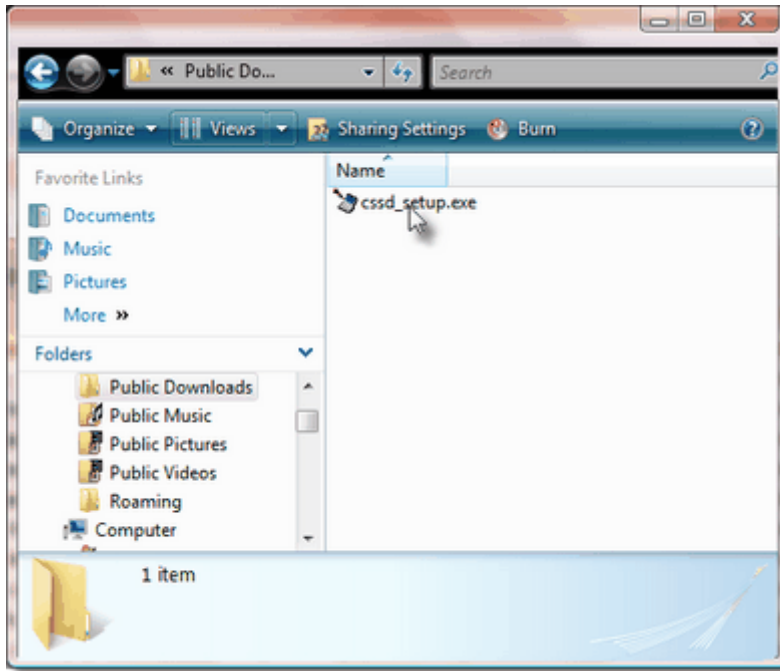
It is possible to run Close Support versions 2.95 and 3.00 against the same database with two limitations:

- Version 2.95 has one field in the Hardware record that is used for both Computer Name and IP Address. In version 3 these values are split into separate fields. The data conversion process takes place when the version 3 Service Desk application connects to your database. If you use the IP address from the Hardware record to launch remote monitoring tools then this may not work as expected in the version 2.95 application.
- Version 3 allows you to define the Call Status that is used to indicate who is currently leading on the Call. See [Support Levels](#) for more information. If you intend to run 2.95 and 3.00 against the same database then we recommend that you leave the Call Status assignment as the default.

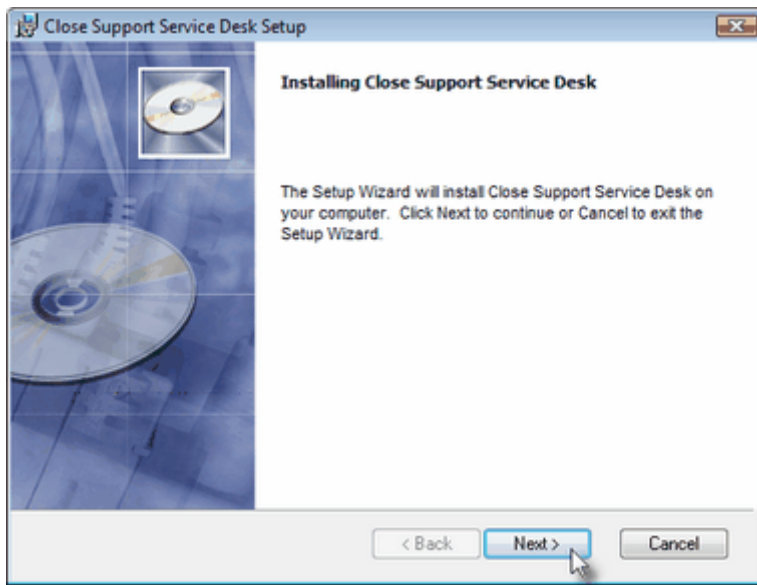
1.3 Installing Close Support Service Desk version 3

Download the installation file, cssd_setup.exe.

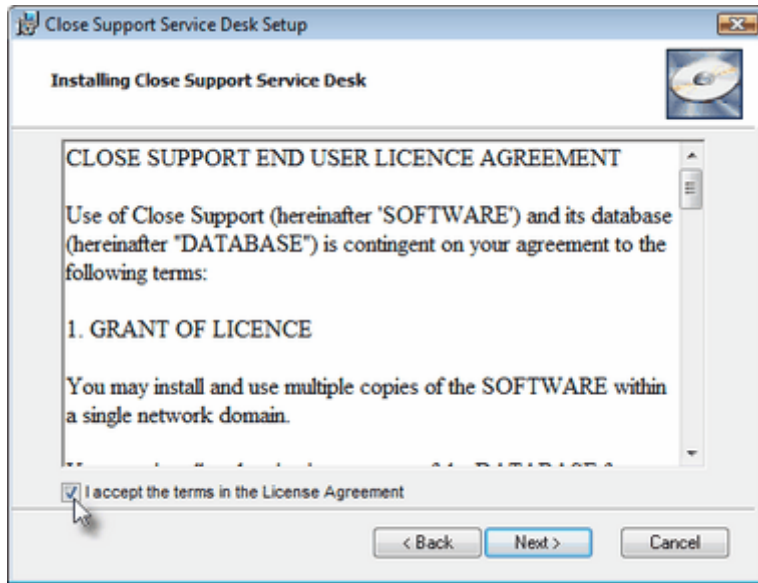
Locate the file on your system and open it (double-click or right-click and select open):



The installation starts with the welcome screen. Click Next:

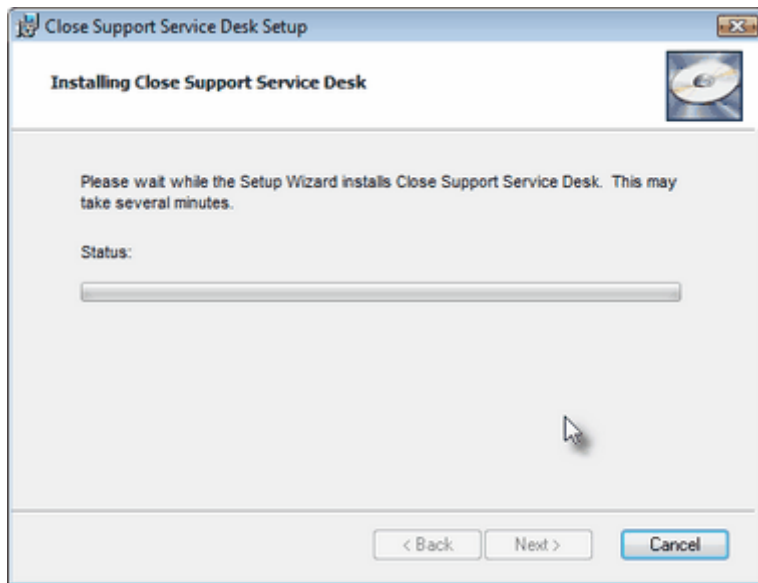


Read and accept the terms of the End User License Agreement then click Next:

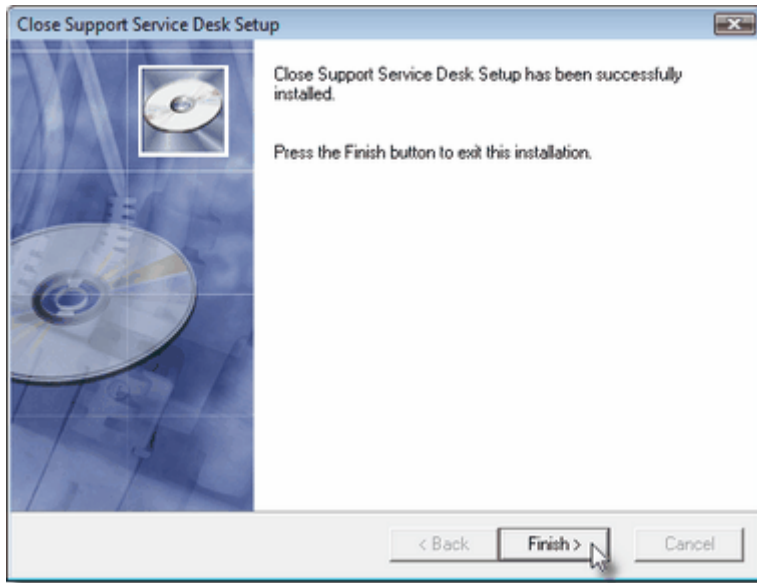


The software will be installed to the Common Application Data folder. For Windows XP this is normally C:\Documents and Settings\All Users\Application Data\CFS\Close Support\. For Windows Vista and Windows 7 the Common Application Data folder is normally C:\ProgramData\CFS\Close Support\.

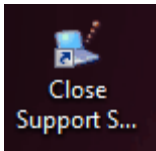
Please wait for the installation to complete. Depending on your system requirements this can take two or three minutes.



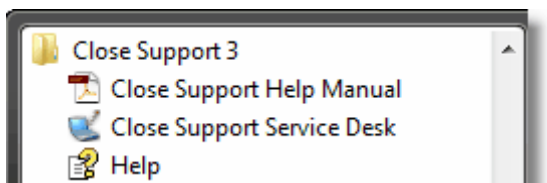
When the installation has completed click Finish



The installation creates a shortcut on your desktop to the Close Support Service Desk:



and a folder and shortcuts on your Start menu:



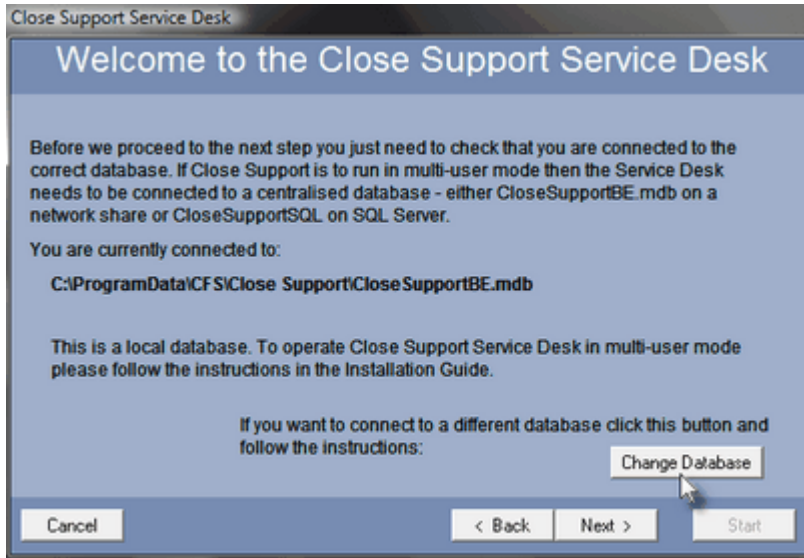
1.4 Launching the Service Desk

If you want to have your local settings copied from version 2.95 then locate the file CS1clSett.dat in the 2.95 installation folder, usually C:\Program Files\Close Support\ and copy it to the version 3 installation folder, the Common Application Data folder. For Windows XP this is normally C:\Documents and Settings\All Users\Application Data\CFS\Close Support\. For Windows Vista and Windows 7 the Common Application Data folder is normally C:\ProgramData\CFS\Close Support\.

Copy the file key.ini into the version 3 installation folder.

Launch the Close Support Service desk from the desktop icon.

On initial launch it is connected to the local database, CloseSupportBE.mdb, and you will be offered the option to connect to a shared database.



You may want to run some of your tests connected to the local database as this will reduce any potential impact on your production database. If so click on Next and start your tests.

If you want to connect to a shared database now then click on Change Database and follow the instructions. To connect to a shared database at a later time you can click on Tools, Connect to database.

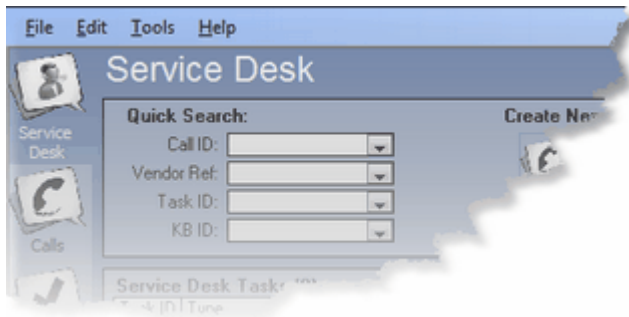
1.5 Rolling out version 3

To install the Close Support Service Desk on other workstations:

- run the installation file `cssd_setup.exe`
- copy the files `key.ini` and `datasources.ini` from your Close Support installation folder to each workstation. This saves your other users from having to connect the application to your production database as this information is now embedded in `datasources.ini`.

When you are comfortable with the use of Close Support Service Desk version 3 then you can uninstall the Close Support Desktop. The uninstall process is launched from Control Panel, Programs and Features.

2 New features



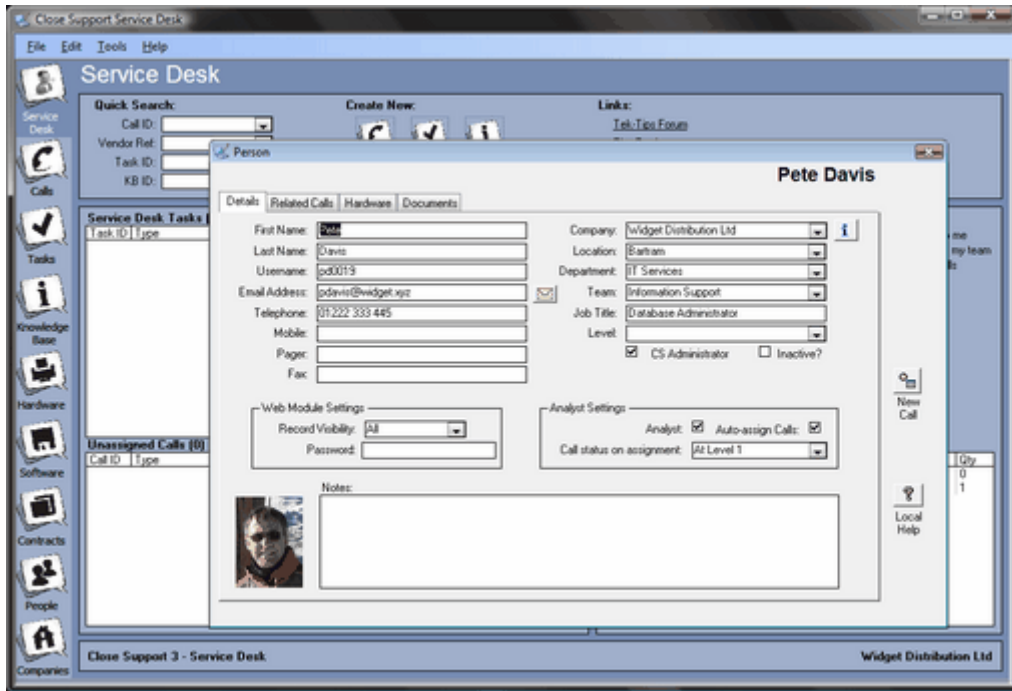
Close Support Version 3 brings some major changes to the product. The development of version 3 modules will be phased with the initial development concentrating on the Close Support Service Desk. This module replaces the Close Support Desktop. It is a Windows application focused on the needs of your support personnel.

The functions in version 3 are built on the solid foundations of version 2.95. This document explains the major areas of change and how existing users of Close Support can configure those changes and utilise them.

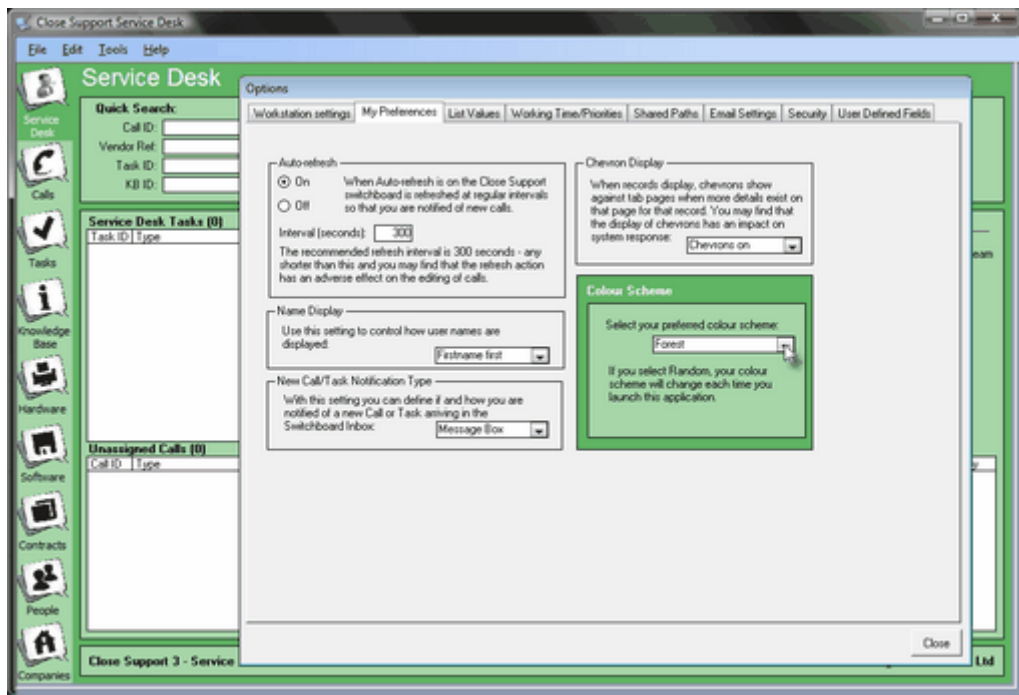
- [Look and Feel](#)
- [The Service Desk screen](#)
- [Configuration Files](#)
- [Support Teams/Levels](#)
- [User Photos](#)
- [Active Directory and User Records](#)
- [Spell Check](#)
- [Auditing](#)

2.1 Look and Feel

Version 3.0 introduces a new look and feel to the main screens in the product. The simplified user interface puts the important information you need right at your fingertips.



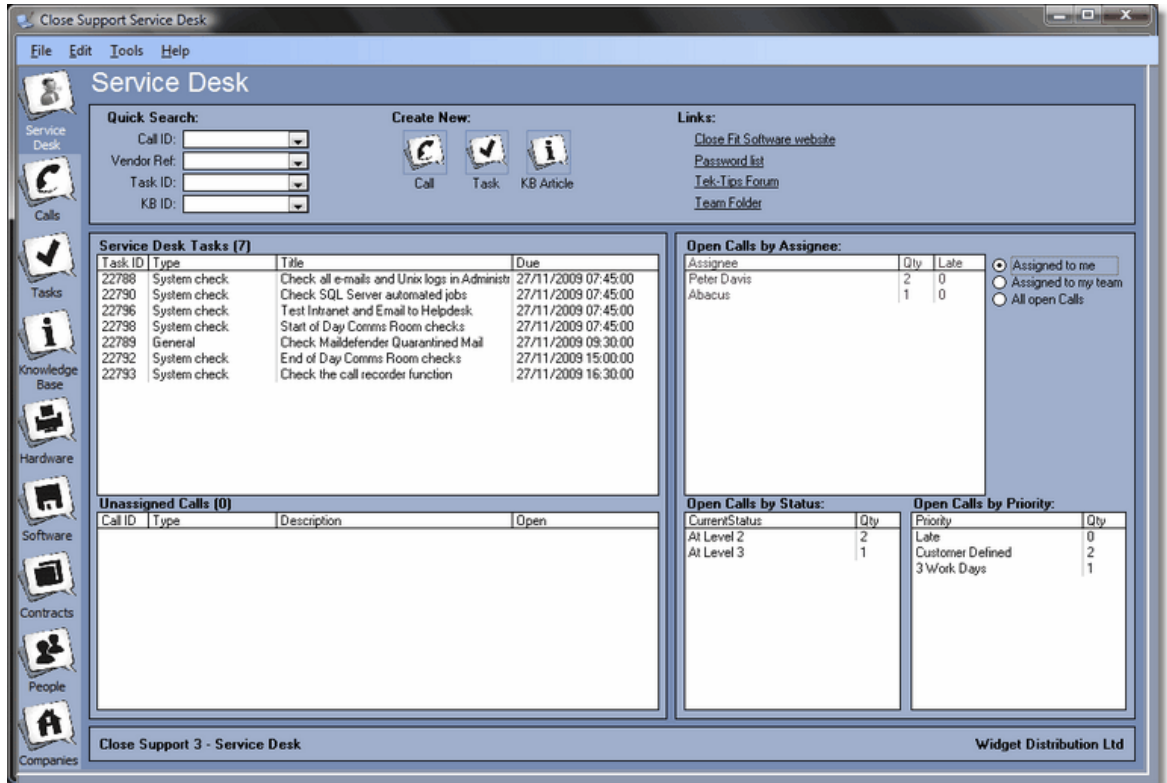
In Tools, Options, My Preferences you can choose a colour scheme for the application:



You can select Random as the colour scheme and a new scheme will be selected for you each time you launch the Service Desk.

2.2 The Service Desk screen

The main screen of the Close Support Service Desk application is the Service Desk itself. It is optimised to show at a glance the jobs that you and your team are responsible for and allows you easy access to all records.



Screen Elements

Quick Access



Convenient access to records and resources related to Service Desk activity. Quick Search allows you to find Calls, Tasks and Knowledge Base Articles by their ID. You can Create New Calls, Tasks and KB Articles directly from this area. Your Close Support Administrator can define up to eight links to resources. These can be files, applications, file system folders or Internet sites. The links are defined by clicking Tools, Options, Shared Paths.

Service Desk Queues

Service Desk Tasks (7)			
Task ID	Type	Title	Due
22788	System check	Check all e-mails and Unix logs in Administr	27/11/2009 07:45:00
22790	System check	Check SQL Server automated jobs	27/11/2009 07:45:00
22796	System check	Test Intranet and Email to Helpdesk	27/11/2009 07:45:00
22798	System check	Start of Day Comms Room checks	27/11/2009 07:45:00
22789	General	Check Maildefender Quarantined Mail	27/11/2009 09:30:00
22792	System check	End of Day Comms Room checks	27/11/2009 15:00:00
22793	System check	Check the call recorder function	27/11/2009 16:30:00

Unassigned Calls (1)			
Call ID	Type	Description	Open
41937	Access Rights	Account locked out	28/11/2009 16:12:00

Tasks for the Service Desk personnel to complete appear in the top area. Unassigned Calls appear in the bottom area. These Tasks and Calls can be picked up and actioned by support staff monitoring the service desk.

Assigned Calls

Open Calls by Assignee:			
Assignee	Qty	Late	
Peter Davis	3	0	<input type="radio"/> Assigned to me
Hilary Church	3	0	<input checked="" type="radio"/> Assigned to my team
Janet Wallace	1	1	<input type="radio"/> All open Calls
Cirus Software Solutions	1	0	
Abacus	1	0	

Open Calls by Status:		Open Calls by Priority:	
CurrentStatus	Qty	Priority	Qty
At Level 1	2	Late	1
At Level 2	3	System Critical	2
At Level 3	2	Low	1
On Hold	2	Scheduled	6

The Open Calls shown here are those related to the current user's team (see [Support Teams](#) for more information). Depending on the selection made, the Calls displayed are those assigned to the user, to the user's team (if appropriate) or all open Calls. Clicking on any line in

these lists will open the Call register showing those Calls.

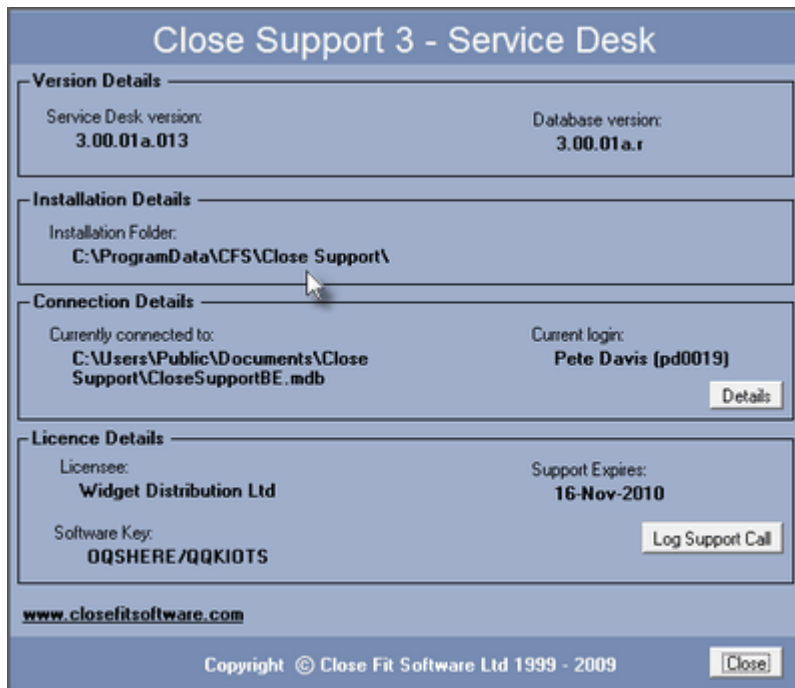
The Register Icons

These icons remain in view at all times and allow you to easily display the relevant search screen.



2.3 Configuration Files

Version 3 sees the introduction of configuration files for the Close Support application. There are three configuration files. These files have the file extension .ini and can be read using any text editor such as Notepad. They can be found in the local installation folder. To identify the current installation folder click on Help, About Close Support Service Desk:



The Installation Folder is shown here as C:\ProgramData\CFS\Close Support\.

The three configuration files found in the installation folder are:

key.ini - contains the details of your software key for Close Support. Close Fit Software will send you a copy of key.ini that you then copy into the installation folder on all PCs that have the Close Support Service Desk installed.

datasources.ini - the database connections used by the Close Support Service Desk are stored in this file. When you connect to a database the connection details are written to the file. When the Close Support software is upgraded the new version of the software will connect to your live databases as defined in this file. You can also copy datasources.ini from your installation folder to other PCs to make it easier to get your support personnel all sharing the same Close Support data.

workstation.ini - this file has various settings that apply to the specific installation of Close Support. You do not need to worry about this file or its maintenance. It will be maintained by the software. The contents of the file may be of use when diagnosing issues and you may be requested to send a copy of the file to Close Fit Software to assist their investigation into any errors.

2.4 Team Working

Calls in Close Support are raised by customers and assigned to analysts. If necessary a Call can be moved on to a third-party support organisation. In previous versions of Close Support the Call Status would be set to "At Level 1" when assigned to any analyst and set to "At Level 2" when assigned to third-party or vendor support.

In version 3 you now have more options to configure Close Support to match the way that you work. You can have one or more support teams with analysts working at one or more levels.

As an example we will take an in-house support department, IT Services, with three teams of analysts working at two levels. It has a Helpdesk team of support technicians and a database administrator. This team is the initial point of contact for customers. There are two other teams; Network Support and Application Support consisting of network and software analysts.

When a support technician is dealing with a Call then that Call is said to be "At Level 1". When specialist skills are needed to deal with a Call then the support technician can elect to pass the call on to the database administrator, an analyst in the Network Support team or an analyst in the Application Support team. The Call Status changes to "At Level 2".

Support staff at any level can also pass a Call to vendor or third-party support. The Call Status changes to "At Level 3".

Please note that the use of multiple teams and multiple levels of support is optional.

See the following help topics for further information on setting up multiple support levels and support teams.

[Support Levels](#)

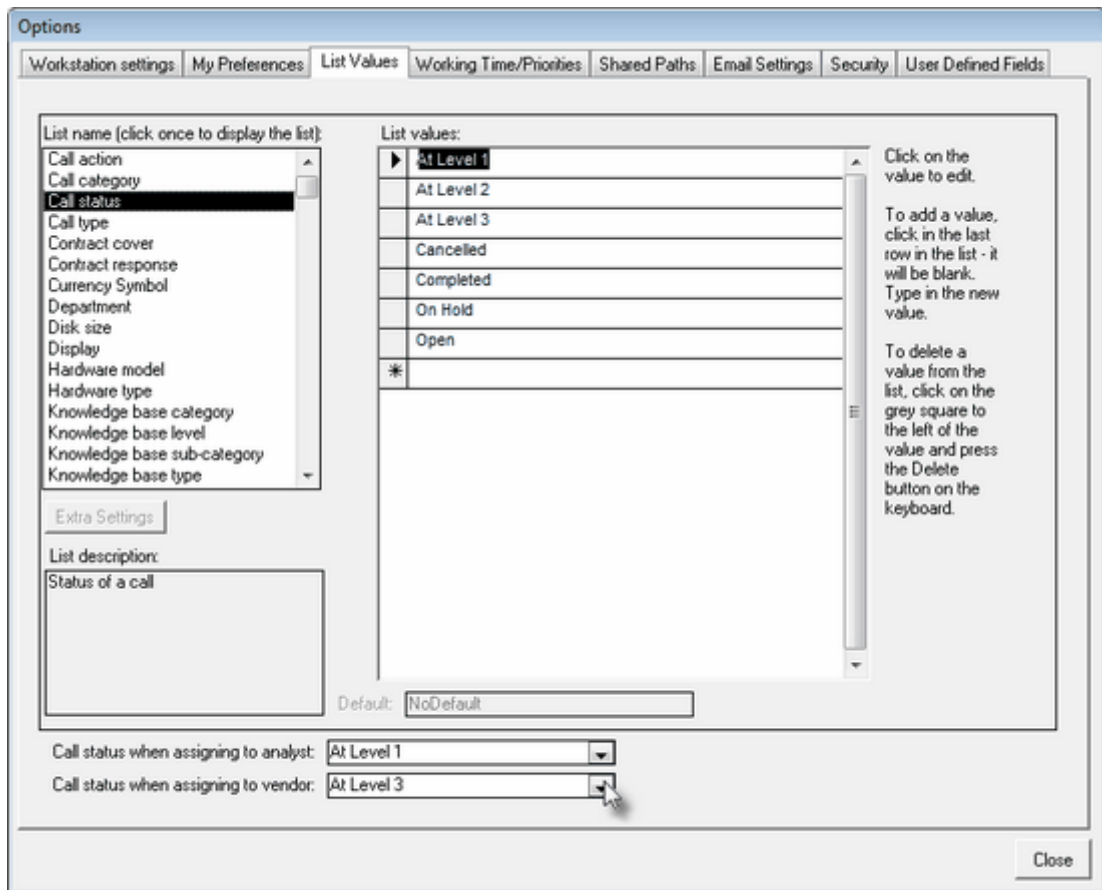
[Support Teams](#)

2.4.1 Support Levels

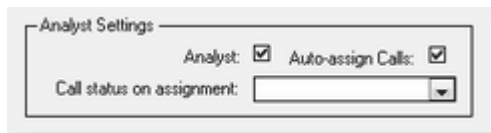
To illustrate how support levels can be used in Close Support, we are going to take the example of an in-house support organisation that has analysts working at two skill levels; support technicians at Level 1 and network and software analysts at Level 2. Level 3 support is provided by vendors and other external agencies.

To configure Close Support to work in this way:

- Use Tools, Options, List Values
- Select Call Status in the list of List Names
- In List Values make sure that the following values are present:
 - At Level 1
 - At Level 2
 - At Level 3
- For "Call status when assigning to analyst" select "At Level 1"
- For "Call status when assigning to vendor" select "At Level 3"

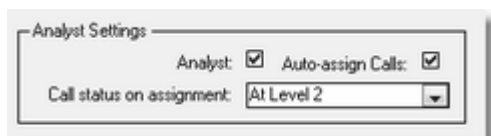


- Open the Person record for each technician and set the Analyst Settings as shown:



Please note that when there is no value for "Call status on assignment" the system will default to the value shown for "Call status when assigning to analyst" on Tools, Options, List Values.

- Open the Person record for the analysts working At Level 2 and set the Analyst Settings as shown:



2.4.2 Support Teams

Do you have multiple support teams? If so you can define these teams in Close Support to improve the management of Calls leading to improved Call resolution times.

Let's build on the example used in the topic about [Support Levels](#). We have a support department called IT Services. In that department we have three teams, the Helpdesk, Network Support and Application Support teams. This screenshot from the People search screen shows the membership of the three teams and the skill level assigned to each analyst:

People

Clear Search

Company:
 Show user records from latest AD import

Department:
 Show Analysts

Location:
 Show inactive records

Search:

Name	Tel	UserName	Company	Department	Team	Assignment Status
Hilary Church	(0222 33) 8869	hb0061		IT Services	Helpdesk	At Level 1
Janet Wallace	(0222 33) 8898	tw0538		IT Services	Helpdesk	At Level 1
Julie Bane	(0222 33) 8818	jb0065		IT Services	Application Support	At Level 2
Justine Kendrou	(0222 33) 8874	jk0824		IT Services	Application Support	At Level 2
Peter Davis	(0222 33) 8808	pd0019		IT Services	Helpdesk	At Level 2
Phil Younger	(0222 33) 8805	py0813		IT Services	Network Support	At Level 2
Sam Brooks	(0222 33) 8866	sb0020		IT Services	Network Support	At Level 2

The Service Desk view in Close Support can now help these teams to work together, ensuring good visibility of Calls assigned to each team including those currently passed to vendor support. Here we are logged in as Peter Davis, a member of the Helpdesk team who operates "At Level 2". The screenshots below show how he can change the view he has of Calls in progress through the use of the three radio buttons in the Open Calls area of the Service Desk view. Selecting any line in the three windows in this area opens the Call search screen with those Calls displayed.

Calls assigned to the analyst. Here we can see that Peter has three Calls currently assigned to him plus one Call where he is the Analyst but the Call has been passed to external support (Abacus), At Level 3.

Open Calls by Assignee:		
Assignee	Qty	Late
Peter Davis	3	0
Abacus	1	0

Assigned to me
 Assigned to my team
 All open Calls

Open Calls by Status:		Open Calls by Priority:	
CurrentStatus	Qty	Priority	Qty
At Level 2	3	Late	0
At Level 3	1	Low	1
		Scheduled	3

Calls assigned to the analyst's team. Peter's team is currently dealing with seven Calls. The Call assigned to Janet is overdue. Perhaps Janet is unavailable. Peter could easily pick up this Call and deal with it on her behalf. There are two Calls that the team is dealing with that have been passed to vendor support.

Open Calls by Assignee:

Assignee	Qty	Late
Peter Davis	3	0
Hillary Church	3	0
Janet Wallace	1	1
Cirrus Software Solutions	1	0
Abacus	1	0

Assigned to me
 Assigned to my team
 All open Calls

Open Calls by Status:

CurrentStatus	Qty
At Level 1	2
At Level 2	3
At Level 3	2
On Hold	2

Open Calls by Priority:

Priority	Qty
Late	1
System Critical	2
Low	1
Scheduled	5
Project	1

All open Calls. This view shows all Calls in progress across all the support teams.

Open Calls by Assignee:			<input type="radio"/> Assigned to me <input type="radio"/> Assigned to my team <input checked="" type="radio"/> All open Calls	
Assignee	Qty	Late		
Application Support	10	2		
Network Support	8	1		
Helpdesk	7	1		
Supra Systemate	1	0		
Cirrus Software Solutions	1	0		
Abacus	1	0		

Open Calls by Status:		Open Calls by Priority:	
CurrentStatus	Qty	Priority	Qty
At Level 1	6	Late	4
At Level 2	14	System Critical	3
At Level 3	3	High	1
On Hold	5	Standard	5
		Low	5
		Scheduled	14

2.5 User Photos

You can configure the Close Support Service Desk to display user images in the Person record screen. As the CS Administrator you can define a suitable network share to store the images. Close Support will then look for a related image file in this location when it displays a Person record.

To configure Close Support to display photos:

- Go to Tools, Options, Shared Paths
- Enter or browse to a suitable folder location in the User Images location field.
- Store the images using one of the following formats for the image filename:
 - [username].jpg, e.g. pd0019.jpg - this is the recommended format
 - [firstname][lastname].jpg, e.g. peterdavis.jpg
 - [firstname]<space>[lastname].jpg, e.g. peter davis.jpg

It is important that the folder location is readable by all those who use the Close Support Service Desk application.

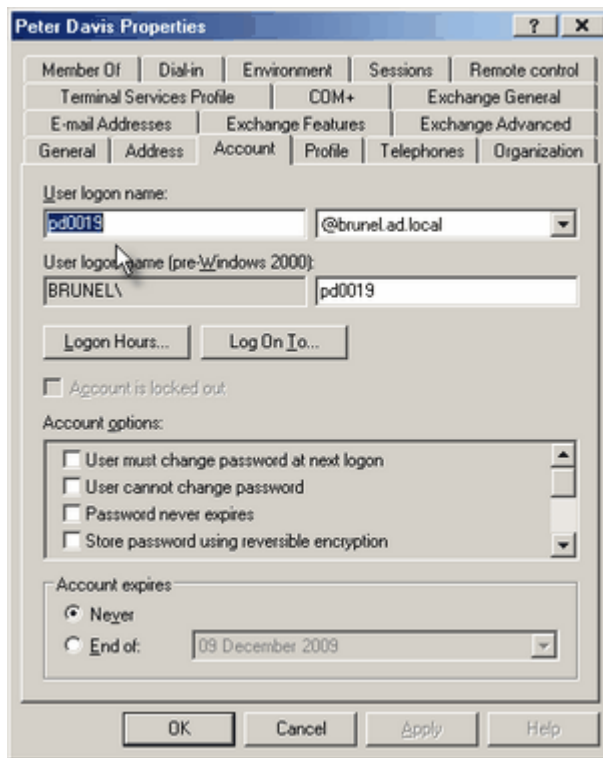
If the folder location is configured but no file exists for a user then this image is displayed on the user record:



2.6 Active Directory and User Records

The Close Support Service Desk can read user records from Windows Active Directory (AD). The import process can be run as often as you like. It will import all records defined by AD as active users. It will also modify existing Close Support user records dependant on the settings you have chosen. The user records in AD and Close Support are matched through the Windows username.

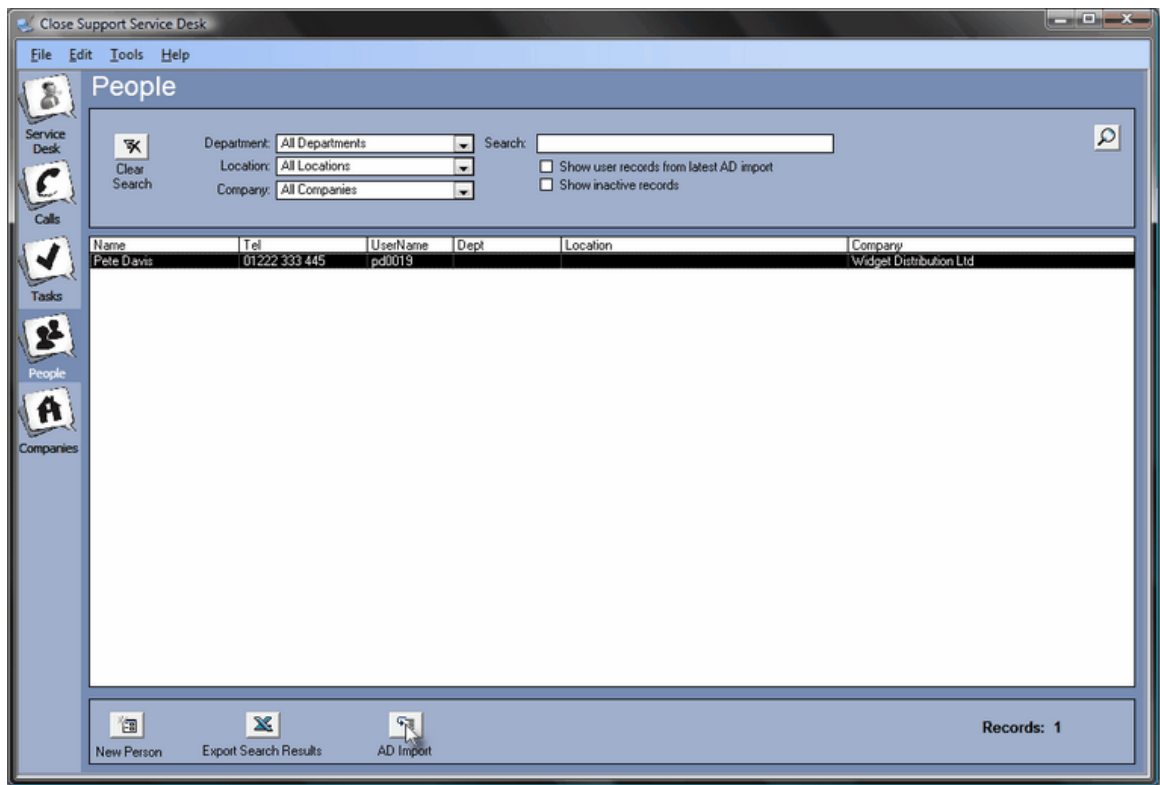
This AD account will be compared with the Close Support user records on the basis of the User logon name of pd0019:



You should use this function with care. We recommend taking a backup copy of your Close Support database prior to running the first import. To use the function you must be running Close Support as a domain administrator. You will need to know the name of your domain controller. The import uses software provided by Microsoft. The software is called CSVDE. This is a command line application. Close Support passes standard flags to the application. If you want to know more about how CSVDE is used please refer to this website:

http://computerperformance.co.uk/Logon/Logon_CSVDE.htm

To run an import click on the AD Import button on the People Search screen:



Enter the name of your domain controller:



On this screen you can make your selections for the information that AD will pass to Close Support user records. If "Create new Close Support user records from AD accounts" is selected then any AD user records that do not exist in Close Support will be created. The records that are selected from AD are all enabled accounts with an objectClass of user and an objectCategory of person.

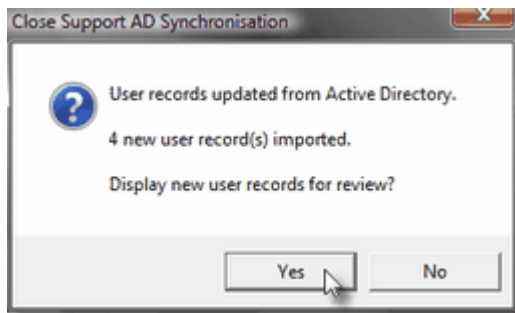
The new user records in Close Support will take the following information from AD accounts:

- Username
- First Name
- Last Name
- Job Title
- Department
- Telephone
- Location
- Email Address
- Company (if the required Company record exists in Close Support)

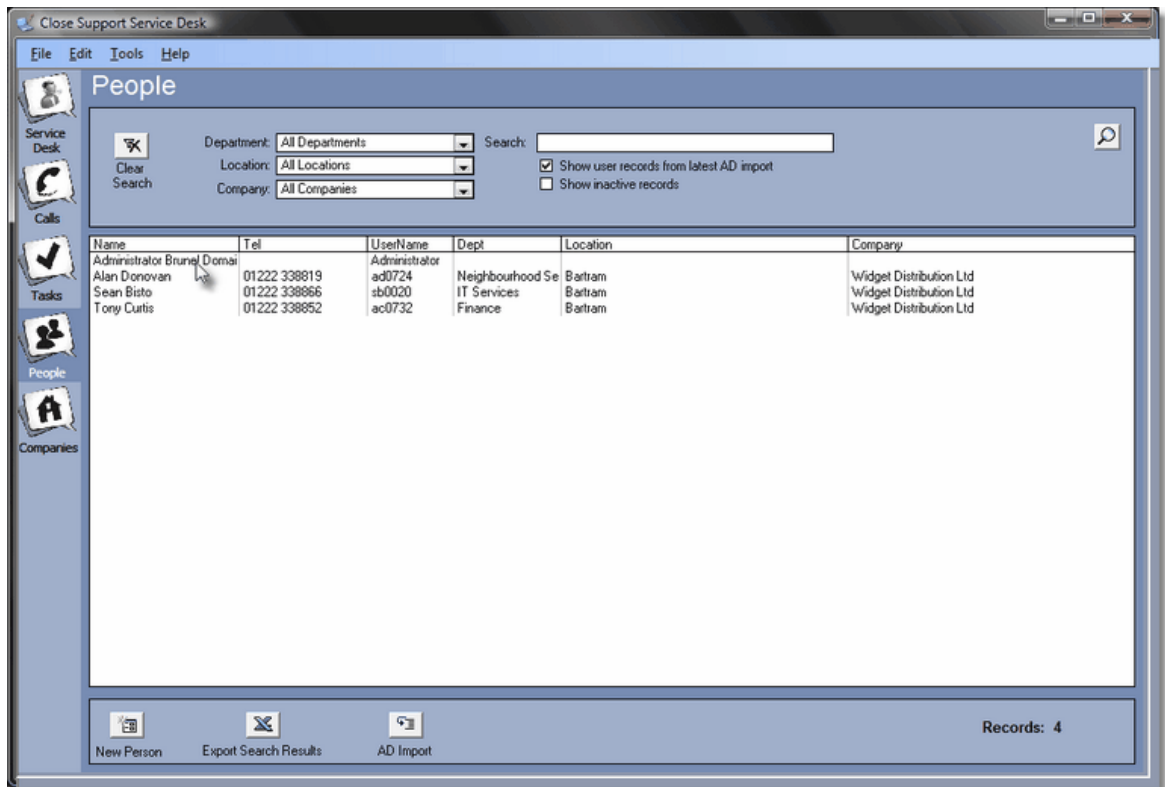
Please note that the information for new user records will be extracted from AD regardless of the other selections on this screen as these selections only apply to updates of existing Close Support user records.

If your AD records are accurate and up to date you will want to leave all the individual attribute check boxes selected. Then, whenever you run this routine, existing Close Support user records will be updated with the details as held in AD. If however your Close Support user records are more accurate than your AD records then you may want to deselect some or all of the attributes.

When you have made your selections click on Run Active Directory Import. At the end of the import routine a message is displayed showing the results of the import:



Click on Yes to display a list of the new user records:



In this list we can see that a service account for the domain administrator has been imported. We can hide this from the list of Close Support user records by making it Inactive in Close Support.

Click on the record to open it for editing:

The screenshot shows a web-based form for editing a person's record. The title is "Administrator Brunel Domain". The form is divided into several sections:

- Personal Information:** First Name (Administrator), Last Name (Brunel Domain), Username (Administrator), Email Address (Administrator.BrunelDomain@widget.xyz), Telephone, Mobile, Pager, Fax.
- Company Information:** Company (dropdown), Location (dropdown), Department (dropdown), Team (dropdown), Job Title, Level (dropdown).
- Administrative Settings:** CS Administrator, Inactive? (with a mouse cursor over it).
- Analyst Settings:** Analyst (checkbox), Auto-assign Calls (checkbox), Call status on assignment (dropdown).
- Notes:** A large text area for adding notes.
- Right Side Buttons:** New Call (with a plus icon) and Local Help (with a question mark icon).

Make the record Inactive and close the edit screen. Now, when you run subsequent AD imports, the records you have made inactive in Close Support remain inactive.

2.7 Spell Check

The Close Support Service Desk now includes a spell check function (introduced at version 3.00.04b). The spell check can be launched by pressing F7 or by using the context sensitive (right-click) menu.

The spell check uses standard techniques to allow words to be added to the dictionary in use. By default the loaded dictionary is American english (en_US). Other dictionaries can be loaded from the Tools, Options, List Values screen by the CS Administrator. Two dictionary files are provided as part of the standard software installation, American english (en-US.dic) and British english (en-GB.dic). Other dictionary files are available from the [Close Support Forum](#).

2.8 Auditing

Version 3 includes an optional module for auditing Windows devices connected to your network. Full instructions for configuring and running the audit process are included in the Close Support Service Desk help (F1).