Global

Global Support Software

User Guide

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Contacting Global Support Software

The GSS User Guide was created to provide a reference for GSS Users. The information presented here will guide Users through creating and maintaining issues and provide helpful information related to tracking, maintaining and closing issues.

Contacting Global Support Software Corp.

Your questions and comments are welcome.

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Introduction to Global Support Software

Global Support Software (GSS) is the answer to automated Help Desk and Call Center issue management. Easily accessible from practically anywhere, the GSS web based interface makes it a convenient and flexible way for your company to control issues and monitor their resolution. GSS is an effective tool geared toward providing you with the means to assign, track and escalate issues quickly and reliably, resulting in an increased level of customer service and satisfaction.

GSS includes a Knowledge Base feature that allows you to build your own on-line library. The Knowledge Base gives you the control to empower your users. End-Users and Technicians alike can access Knowledge Base articles quickly and easily, facilitating prompt problem definition and resolution. You have control of the information available. Provide trouble shooting information, product documentation, FAQs, even application tips and tricks. The choice is yours.

Any user with Internet access can communicate and share information quickly and easily with GSS. Very little training is required before beginning to take advantage of the power of GSS. This guide will provide clear instructions, walking you through typical issue management tasks so that you can get started right away. Spend a few minutes with this guide to familiarize yourself with GSS's terms and conventions and you will soon be on your way to better issue management.

Entering and Managing Issues

Log into the Site

A user name and a password are required to access GSS. Your System Administrator will supply this information to you. Enter your user name and password and click the **sign on** button on the GSS Sign In screen.

If you should need to sign in as another user while you are already logged in to GSS, simply choose the **Log Out** option from the menu and the Sign In screen will be displayed once again.

GSS will automatically sign you out when your browser window is closed or when you move to a web site outside of GSS.

Changing your password

After entering your user name and password on the Sign In screen, check the box indicating that you wish to change your password. Click the **Sign In** button. Enter your new password twice to verify it.

Some users may not have authorization to change their password. If this is the case, a message will display stating that you are not authorized to change your password.

Self Registration

If you do not have a user name and password, your system administrator may have Self Registration enabled. To register on the GSS site, simply click on the **Register Now** option. Depending on your site's options, you will be able to create your own password while registering, or one will be sent to you once you have entered your Email address. You will be able to sign in as soon as you have created your account and received your password.

About Issues

Any trouble call, ticket, work order, problem report or action item requiring attention may be referred to as an issue.

Before you begin to work with issues, you should be familiar with certain issue designations. These designations correspond to the ways in which issues might be related to you. This method of referring to issues allows you to display issues you may be interested in on the GSS Home page. Let's take a look at each designation type.

Note: These user roles are also referred to as the 'Key Users' on an Issue.

Submitted by	The person submitting an issue is typically the person reporting the issue.
Entered by	Generally the person submitting an issue is also the person who entered the issue. If you have been given permission to submit issues for others, you may be listed as the user entering the issue, and the person you are submitting the issue for would be recorded as the user submitting the issue.
Assigned to	The individual tasked with resolving the issue.
Next Action	An individual tasked with assisting in solving an issue.

The Home Page

Once you have successfully signed in, your browser will display the GSS Home page. Menu options available to you will be listed on the left side of the screen. These menu options may not be the same for all users.

> *NOTE: Some menu items discussed in this guide may be unavailable to you.*

The options shown in the menu are determined by the permissions assigned to you by your System Administrator.

By default, once you sign in you are brought to the "My issues" page. This page is discussed in more detail below. If you would prefer to have another default homepage display after you sign in, you may change it, along with your current time zone on the "My Settings" page.

The right side of the GSS Home Page has three sections. First is a home screen message that is displayed to all users. The message will allow HTML formatting and can use hyper links to move a user to a web page such as a Knowledge Base article.

The middle section shows a list of reports that will display the issues that the logged in user is involved in as the Enterer, Submitter, Assigned To, or Next Actioned To. The list shows the number of issues that will appear in the report when it runs. The following image is a screen shot of the results of clicking on a

home page report link. You may use the drop down box to change the display order of the report.

The third area of the home page is a section called My Reports. This area displays the custom reports you have saved previously while working with searches. The reports that display here are only available to the logged in user unless an asterisk appears behind the name of the report. This marks a report as public, meaning it can be seen by everyone. To run or work with one of the reports, click the report name on the list to highlight it and click the appropriate button below the box.

Run Report	This options runs the selected report
Edit Report	This option allows the owner of the report to make changes to the criteria listed on the report.
Delete Report	This option deletes the selected report

The issues you may enter, view, or edit are determined by the user attributes assigned by your System Administrator. These attributes or permissions dictate how you are allowed to interact with issues. Some users may be allowed to submit issues, but may not be allowed to assign an issue to another individual for action. Others may be allowed to submit and assign issues, but may not be allowed to update issues once they have been submitted.

The Submit Page

The submit page is used to enter issues into the tracking system. It can be accessed by clicking on **Submit an Issue** from the menu. The following page will appear.

The information requested on this screen ultimately helps the person assigned to this issue resolve it as quickly and efficiently as possible. You will be asked to provide a Subject, or short statement describing the problem, followed by a more comprehensive explanation of the problem in the Full Description box. Provide as much information as you can.

Next select an issue type. An issue type is a category that has been established by your administrator to help the support team quickly determine the general nature of your issue. Issue types are sometimes used to automatically assign an issue to support personnel. If a subtype drop down appears, please make a selection here as well. This box will only appear if it is activated by your administrator. Subtypes help further define the type of issue you are reporting.

Below you will see a sample submit page as a user with administrative rights would see it.

Quick Pick: [ ]

Organization: [Global Support Software] 🔍 details ~ history

Caller: [ ] 🔍 details ~ history   **ADD NEW CALLER**

SpecialFunction:
Field1: [ ] 🔍   Field2: [ ]
Field3: [ ]   Field4: [ ]
Field5: [ ]   Add New ~ History ~ Complete Record

Subject: [ ] *
Full Description: [ ] *

Issue Type: [ ] *
SubType 1: [ ]
SubType 2: [ ]
SubType 3: [ ]
SubType 4: [ ]
Project: [ ] 🔍
Configuration Item: [ ]
Location ID: [ ] 🔍 details
Text Field 1: [ ]
Text Field 2: [ ]
Text Field 3: [ ]
Text Field 4: [ ]
Text Field 5: [ ]
Text Field 6: [ ]
Responsible Dept: [ ]
Assigned To: [ ] 🔍 hints

Next Action By: [-Unassigned-] 🔍 hints
Priority: [Medium]
Issue Status: Open [ ]

Table Driven 1: [ ]
Table Driven 2: [ ]
Table Driven 3: [ ]
Table Driven 4: [ ]
Table Driven 5: [ ]
Table Driven 6: [ ]

Task Manager	Task	AssignedTo	Completed

Target Date: [ ] 📅 🎁 dd-mmm-yyyy
Required By Date: [ ] 📅 🎁 dd-mmm-yyyy

☐ Include Attachment? (upload screen will display on submit)
☐ Suppress Email Notifications for this Issue

Navigation (left menu):
Home
My GSS
Submit an Issue
Search Issues
Lookup Issue #
Unassigned Issues
Calendar
Knowledge Base
Projects
Reports
Administration
Log Out

This page contains options that are controlled by user attributes and system settings that provide more information for the issue. Let's take a look at each element we see.

Organization	The organization box will appear if you have the right to submit issues for other users. Select an organization by clicking on the binocular search. After an organization is selected, caller names are limited to only those users that belong to the selected organization.
Caller	This field also only appears when you have the right to submit for other users. An example of a search page that appears when you click on the binoculars is shown below.

Select User Record

<Previous   Next>

Page 1 of 4 (47 records total)

Display Name	Organization	Dept	Phone
Accounting	Widgets America	Accounting	
Accounting One	Widgets America	Accounting	
adfadsf adfadf	Customer One		
Admin	Widgets America		
Anderson, Steve	Widgets America	Information Technology	
Anderson, Steve	Widgets America		
Anderson, Steve	Test Org	Information Technology	757-473-5759
be#au, l#beau	Customer One	Accounting	
bee, bee	Customer One		
Booth, Lisa	Widgets America		
Car, Toy	Customer One		
Customer One	Customer One	Accounting	
Customer Three	Customer Three		
Customer Two	Customer Two		
Customer, Jane	Customer One		

ADD NEW CALLER

Display Name: | User ID:

Last Name: First Name:

Organization: Phone:

Department:

[Search]

The search page has several criteria that can be used to find a user. If you enter the first name of 'Jim' you will see all records with a first name of Jim. If you enter 'J", then you will receive a list of all first names that begin with 'J', this will help narrow down your search results.

In addition on the user search you have the ability to add a caller from the pop up or the submit page if you have the rights to do so.

Two links are displayed beside the caller and the organization fields. These links provide more information about the user and the organization. They are:

- *Details* – This pop up shows detail information about the user.
- *History* – This page shows a list of issues submitted by the caller in the past.

A brief description of other fields which may or may not be included on your Submit screen follows.

Special Function:
A User-Defined table has been added to facilitate storage of information such as customer records and can be defined by your administrator in system preferences.

Full Description with Rich Text Editing:
The full description field now allows you to add formatting to your notes in GSS. You can change fonts, font size, and font color if you wish. In addition you may add tables and links to URLs. Spell checking is also available.

Projects:
Sometimes an issue is related to a project. The project is turned on by a system setting and is used to group issues together for project members.

Configuration Item:
Another field that is activated in system settings is Configuration Item. This field can be used to enter specific information the administrator might want to capture, like Operating System.

Location ID:
The location field is also turned on in system settings. This field may have a different label on your screen. An administrator can rename this field to reflect what locations may be called by your company. This field is populated automatically if the submitter has a location value in their user record.

Text Fields 1-6:
These fields are activated in system settings and can be named according to the needs of your company and your administrator. They are used to collect and provide additional information about the issue for the support team.

Resp. Department:
This optional field allows you to assign an issue to a particular department and can be activated in system settings.

Assigned To:

Only users with permission to assign issues will see this field. Display of this field is controlled by a user attribute. A user who can assign an issue can select users from a search list populated users who have the "CanBeAssignedTo" attribute. This value is sometimes automatically assigned.

Next Action:

Only users with permission to assign next action on an issue will see this field. It is controlled by the "CanAssignNextAction" user attribute. A user who can assign next action can select from a list of users with the "CanBeAssignedNextAction" attribute when assigning next action. This value cannot be auto assigned.

Priority:

In some cases a user will be allowed to assign a priority to an issue. This gives the support staff an idea of how quickly you need the issue solved or how critical the issue is to you.

Issue Status:

All issues are considered "Open" or "Closed". In some cases a user may be granted the right to add an additional sub status to the issue. This field will appear if sub status is activated and the user has the proper user attribute necessary to change it. Sub status values are defined by the GSS administrator.

Table Driven 1-6:

These are optional table values that are added in system settings by the administrator. They are activated and defined by your system administrator depending on your company's needs.

Tasks:

Sometimes issues include one or more specific tasks. If you have "CanBeAssignedTo" or "CanBeAssignedNextAction", you might be assigned a task to complete on an issue. All tasks must be completed before the issue can be closed. Tasks are an optional feature and only appear if they have been activated in system settings.

Target Date:

A Target Date is the date you would like this issue resolved. This is an optional field activated by the administrator when desired. The date format is displayed to the right of the field, and a pop up calendar is also available.

Required By Date:

The field should be completed when you have a specific time requirement for resolving an issue. Required By Date is optional and is activated by your GSS administrator when desired. The date format is displayed to the right of the field, and a pop up calendar is also available.
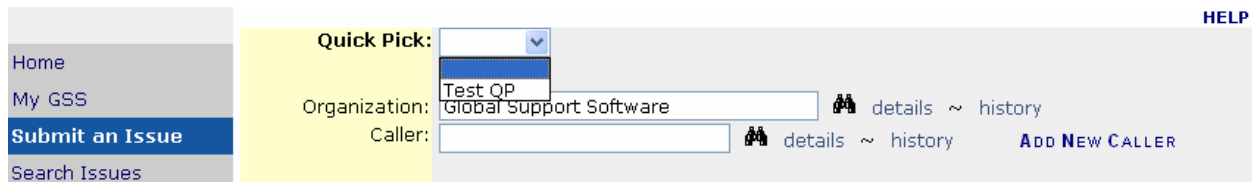
Suppress Email Notifications for this Issue:

> If this option is checked while submitting an issue, email notifications from GSS will not go out to respective users.

Severity:

> Although this field isn't viewable when submitting an issue, you will see it on all subsequent views if service level agreements (SLAs) are enabled on your site. An administrator may assign a severity to your issue after you submit it, which will then relate it to your proper SLA.

Quick Picks

In some installations, your Administrator may allow you to use **Quick Picks**. A Quick Pick is a predefined Issue that can be selected from a drop down list at the top of the submit page. Quick Picks are defined by your administrator and will pre-fill some information about an issue. You may modify the information to make sure it completely describes your issue before you submit it to the helpdesk.

Adding a Note

Notes are a special way to communicate information regarding an issue. A note can be used to ask a question or gain clarification from the person submitting the issue. If GSS was installed with the email option activated, adding a note to an issue will email the note to the person submitting the issue. Then, when that person receives an email notification that a note was added to their issue, they may add a note of their own to "answer" the question or provide a response.

This allows a direct dialog between the user submitting the issue and the technician assigned to the issue and retains this correspondence as a part of the issue.

Private Notes

As the person assigned to an issue, you may enter a private note if you wish to add information regarding the issue that you do not wish to be forwarded to whomever submitted the issue. If you have permission to add private notes, the **Private Note** check box will appear under the note entry area on the **Add Note to Issue** screen. Selecting this box when you add your note prevents forwarding of the note via email. If **Private Note** has been selected, the note will not be visible to others when viewing the issue.

Adding an attachment

At times you will need to add an attachment to an issue. You may do this when you submit the issue by checking the **Add Attachment** checkbox before you submit the issue or by clicking on "Attachments" from the submenu on the left. When you click on "Attachments" the following page will appear.

Click on "Browse…" to find the attachment you would like to add. You may select up to three files before you click "Save Selected Attachments". Once you do this, the application will add the attachment(s) as a link on the issue. You may add as many attachments as you wish to an issue.

Editing an Issue

Display the issue you would like to edit on the screen. From the *Issue Detail* menu, choose the *Edit Issue* option. Update the information and click the *Save Changes* button when you have finished editing the issue.

NOTE: Not all users will have the ability to edit issues.

If you do not see the *Edit Issue* option in the menu and you would like to edit an issue, contact your Administrator.

Closing an Issue

The *Close Issue* option will be available on the *Issue Detail* menu if you have been given the authority to close an issue. To close an issue, you must first display the issue, and then choose *Close Issue* from the *Issue Detail* menu.

Record the details of the solution and add a final note if you like. All of these fields are not required. When the information you wish to add has been entered, click the *Close Issue* button. The issue status will be set to "Closed" and an email will be generated to the submitter of the issue notifying him/her that the issue has been closed.

Rich Text Editing

GSS Software offers you the ability to add richness to notes in your issues, through a feature called *Rich Text Editing*. Your system administrator has the ability to activate this feature. This feature makes it easy to add emphasis to your notes as well as change font colors, sizes and types. In addition, there is a spell check feature which allows you to check the spelling of the text you have entered.
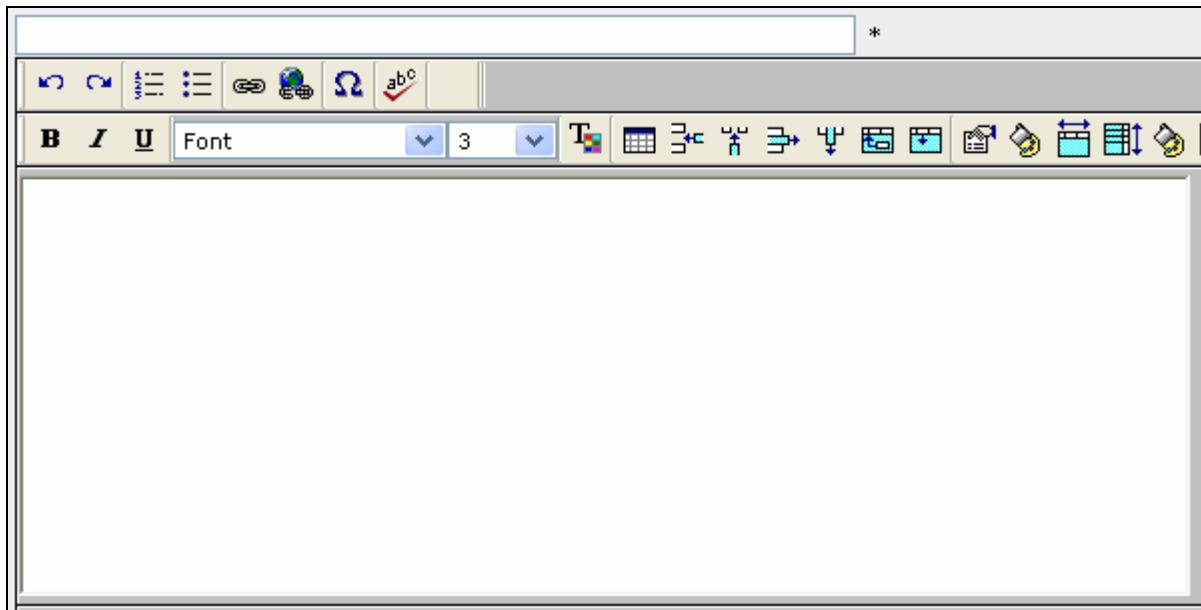
Emailing Issues

Many times users need the ability to send a copy of an issue to a user who is not a user in the GSS system. You can do this by clicking the *Email Issue* link at the top of the Issue View page. This will bring up a pop up window that will allow you to send a copy of the issue to the address you enter in the "To" address at the top of the form. You can also select a GSS user by clicking the binocular search.

Cloning Issues

There may be a time when you need the ability to create a copy of an issue that has already been submitted. You can do this by clicking the **Clone This Issue**

menu option from the Issue View page. This will bring up a copy of the issue for you to edit and submit.

Locating and Viewing Issues

Searching for an Issue

GSS offers several ways to locate existing issues. Remember that all options may not be available to you, depending on your user permissions.

Home Page Display Options

The *Display Issues* list on the Home Page offers several options for displaying issues. Each option displays issues meeting the issue designation – entered by me, submitted by me or assigned to me. Only issues related to you in some way are available from the Home page. Once the issues are displayed, you need only click the link to display the issue detail screen for the selected issue.

Lookup Issue # Option

If you know the issue number, choose the *Lookup Issue #* menu option. Enter the issue number and the Issue Detail screen for that issue will appear.

Search Issues Option

The *Search Issues* menu option provides a wide variety of ways to locate specific issues from very broad to very narrow searches. When this option is selected, you will be presented with a query screen offering many issue-related criteria fields to define your search. Fill in as many or as few of these fields as you like. The more fields you fill in, the narrower your search becomes.

The search selections offered allow you to locate issues by issue related criteria such as status, priority, description, etc.; by user related criteria such as who submitted or entered the issue, departments and locations of issues, issues assigned to a particular person, etc.; and also by date related criteria such as date ranges and specific time periods (*last month* or *this year)*. Take a moment to experiment with the useful search capabilities that GSS has to offer. You'll find they provide a versatile way to retrieve and view issues.

GSS also offers extensive sort options for your searches. You can control the order in which records display by selecting up to three sort values. The records returned will be displayed on the screen according to the values you select from the sort lists.

The output options at the bottom of the page allow you to view your search results in many different formats, including having the ability to export the results to an Excel spreadsheet. Experiment with the different formats to see what works for you.

Unassigned Issues

The ability to view Unassigned Issues is an option available only to those users allowed to assign issues to others. When this menu option is selected, all unassigned issues are displayed listing the most recent entries first. Click on the link to display an issue from the list.

The issue will be displayed, along with a drop-down box listing all people who can have issues assigned to them. Choose someone from the list, and click on "Assign" to assign the issue. If email notification is turned on, that person will receive an email.

Reports

Several reports are available to provide issue information; the reports shown may vary according to the reports provided for your company. There are three types of reports: **Management Reports**, **Saved Searches** and **Report Writer Reports**. Management Reports will only appear for those users who have permission to run them.

Select the *Reports* option from the menu and the Select Report screen appears listing all available reports. Choose the report desired. A preview of the report will be displayed on your screen for review prior to printing. If the *Reports* option does not appear on the menu, you may not have permission to run reports.

Menu	Select Report

Home
My GSS
Submit an Issue
Search Issues
Lookup Issue #
Calendar
Knowledge Base
Projects
Reporting
Queries
Reports
Log Out

Management Reports:

```
Summary of issues by Support Rep
Summary of issues by Submitter (caller)
Summary of issues by Assigned To
Summary of issues by Next Action
Summary of issues by Issue Type
Summary of issues by Issue SubType
Summary of issues by Location
Summary of issues by Region
Summary of issues by Submitting Department
Summary of issues by Assigned Department
```

[Run]

[New] [Edit] [Clone] [Delete] [Run]

Custom Reports:

```
Issues Awaiting Customer Verification (S)
Issues Pending Action (S) *
```

(S) Saved Search   * Public Report

Saved Searches

The criteria for a search may be saved as a **Saved Search**. This report is only available to the user who created it and administrators. A list of these reports appears on the home page under the heading "My Reports". You can create saved searches at the bottom of the search page in the "Report Output Options" section. Here you give a title to the report and then select the output option you want. Add any sort orders you need. You may mark the report "Public" by checking the Public checkbox option. Then the resulting report will be available to all users. Click on "Save New Report" and the criteria will be saved as a saved search. To see all of your reports from the search page, click on "Retrieve Report Definitions".

From this page you may Delete or Edit any existing report.

Target Date:	⌄	Start:		End:		dd-mmm-yyyy
Date Opened:	⌄	Start:		End:		dd-mmm-yyyy
Date Closed:	⌄	Start:		End:		dd-mmm-yyyy
Required By Date:	⌄	Start:		End:		dd-mmm-yyyy

Time Open: [ ] *days* ○ *less than* ⦿ *more than* ○ *equal*

Hours: [ ] *hours* ○ *less than* ⦿ *more than* ○ *equal*

Report Output Options

Report Title: [ ]

Output: [Brief List ⌄] ☑ Include Criteria in Results

Sort Order 1: [⌄] [Asc ⌄]

Sort Order 2: [⌄] [Asc ⌄]   [Save New Report] ☐ Public

Sort Order 3: [⌄] [Asc ⌄]   [Retrieve Report Definitions]

[Search] [Reset]

Report Writer Reports

Along with saved searches, you can also create reports using the GSS Report Writer. With Report Writer you can control specific output details in your report, such as sort order and margin width. You'll also be able to group pieces of data together into logical elements.

To create a Report Writer Report, you must first create a **Query**. After clicking on the *Reports* menu, click on the *Queries* menu option. This will take you to a screen very similar to the reports screen. Here you'll be able to create, clone, edit, delete and run queries.
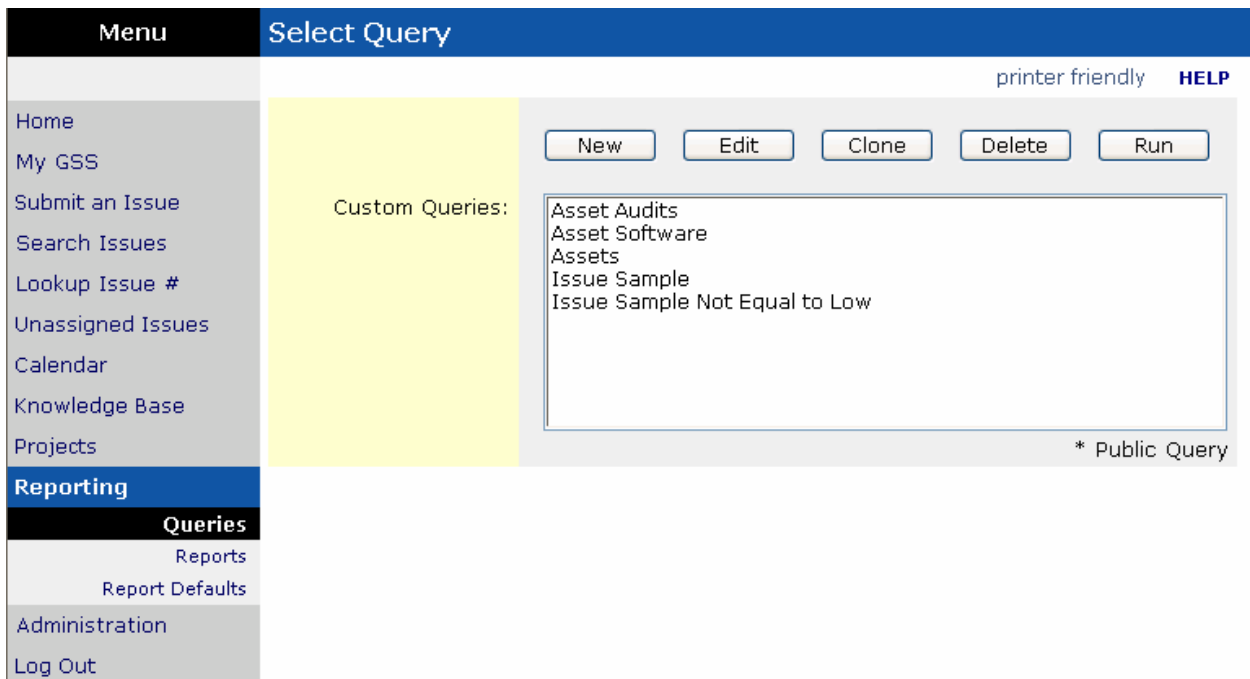
Clicking the "New" button will guide you through a series of screens designed to walk you through the query creation process.
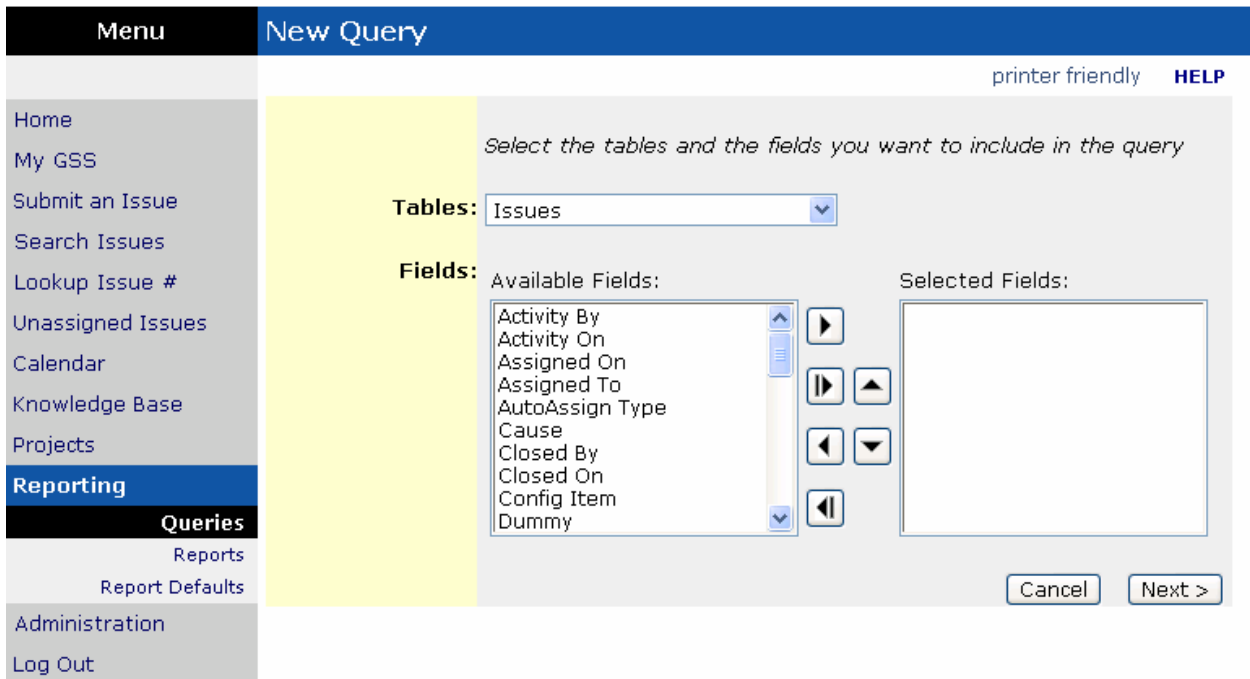
The first screen in the Query creation process is shown above. From here you will need to select a table to retrieve data from. A variety of tables are available including issues, users and organizations as well as data from other installed modules. Once you select a table you will be able to select which fields from that table are to be included in the query. Once your fields have been selected, click the "Next" button.

The next screen will allow you to filter the data returned. You can create filters that describe what kind of records to be returned, such as only issues assigned to a particular user, or only users assigned to a particular organization. To create a filter, select the field from the list of available fields in which to limit data. A field does not need to be returned in the query in order to create a filter against it. Then select the appropriate condition.

Most conditions are self-explanatory. A few that may not be are "In" and "Like". The "In" condition allows you to type a series of values separated by a comma. In the example above, the "In" condition is used with the Priority field to check for values of "Medium" or "High". No space is used after the comma. The "Like" condition will search for the value entered in the field selected. For example, if Priority LIKE i was entered, both values "Medium" and "High" contain the letter i and would be returned.

Each filter expression is added using the "Save Filter Expression" button and is added to the overall filter for the data. Most expressions will be entered using the "And" connector so that each filter expression must be true in order for a record to be returned. In some cases, the "Or" expression will be used so that a record will be returned for any expression that is true.

Filter expressions can be removed by highlighting the expression and clicking the red "X" to delete. After you have created the desired filters, click "Next" to continue.

The next screen will ask you to enter a name for your query, along with an optional description. You can also designate the query public on this screen if you wish. Click on the "Create Report" box if you wish to be taken straight to the report creation screen once you click on the "Finish button".

Tip: Before creating a report using this query, run the query to ensure the expected data is returned. This data will not be formatted or sorted, these options are applied during the report creation process.

Once you have created a query, you can now create a custom report. By clicking on the *Reports* menu option and then clicking the "New" button, you will be taken to a screen similar to the query creation screen.

Instead of selecting a table you will be asked to select a query. This provides the ability for multiple reports to be created from a single query. Select the query desired and the fields from the query you want to be displayed on your report. If the desired query does not exist, you can create it by selecting the "Create Query" button. Click the "Next" button to continue.

The next screen is the column defaults screen. You can modify the presentation of each field such as modifying the column name, format, subtotal options (Average, Count, Sum), justification and width. These options are pre-filled with

the selections specified on the **Report Defaults** menu. Once you are satisfied with your display formats, click the "Next" button.

The next screen is the grouping screen. Here you can select which fields you want your data grouped into. For example, you can have your issue records grouped by priority or the date they were submitted. Once you have selected what fields you want to group by (if any), click the "next" button.

The next screen is the Group Default Options screen. This screen is only shown if you have selected at least one grouping field on the previous screen. Here you can designate whether you want whether the values for the groups selected are

to be displayed in ascending or descending order, as well as if you want to show a footer for each group. Click "Next" to continue.

Note: All subtotal values are shown in a group footer as well as the report footer. If you have selected a subtotal for any of your data, the group footer must be shown.

The next screen will allow you to sort the data returned. Any fields that were previously selected to group by are automatically sorted as specified on the Group Options screen and are not available here. These sort conditions apply to the details of information within each grouping or to the overall report if grouping is not selected.

Each sort is added using the "Add Sort" button and is added to the sort phrase. For each sort expression, specify whether the "Ascending" or "Descending" order should be applied.

Sort expressions can be removed by highlighting the expression and clicking the red "X" to delete. Sort expressions can also be reordered by highlighting the expression and clicking the "Move Up" or "Move Down" buttons. After you have created the sort, click Next to continue.

Finally, you will be asked to give your report a name, title and description, along with whether you want the report to be public or not. Click the "finish" button and your report will be created.

Report Defaults

Default settings for Report Writer Reports may be modified under **Report Defaults**. After clicking on the *Reports* menu, click on the *Report Defaults* menu option. Here settings can be modified for field format, justification and column width. In addition, you can set the maximum number of records, number of records printed and displayed per page.

	Data Type	Format	Justification	Width
Defaults:	Number	General (3456)	Right	10
	Decimal	Currency ($3,456.78)	Right	20
	Yes/No	Standard (Yes/No)	Center	20
	Date	Medium (19 Jun 1994)	Left	50
	String	(under 1000 characters)	Left	
	Large String	(1000 characters and over)	Right	
	Hour	General (HH:MM)	Right	50

1000 Maximum number of records returned
20 Number of records printed per page (0=Unlimited)
10 Number of records displayed per page (0=Unlimited)

Update

Each field in the GSS system has a corresponding data type. For example, the Issue Number is a "Number" data type and the Total Hours is an "Hour" data type. You can set the default format, justification and width for each data type.

Format Types
Format Types specify how a field will be displayed. Settings only pertain to reports, not queries.
Number (Whole number values with no decimals)
> General (3456)
> Standard (3,456): Includes thousands separator
> Percent (123%)

Decimal (Number values with two decimal places to the right)
> General (3456.78)
> Standard (3,456.78): Includes thousands separator
> Currency ($3,456.78): Includes thousands separator and dollar sign
> Percent (123.00%)

Yes/No (Typically used for attribute fields)
> General (True/False)
> Standard (Yes/No)

Date
> Long (Sunday, June 19, 1994)
> Medium (19 Jun 1994)
> Short (6/19/1994)

String (All character fields under 1000 characters)
> No formatting options available for this data type

Large String (All character fields 1000 characters and over)
> No formatting options available for this data type

Hour
> General (HH)
> Standard (HH:MM)

Justification
Justification specifies how the data will be displayed in a column on the report. Valid choices are:
> Center
> Left
> Right

Width
Width specifies how wide the column should display on the report. The unit of measure is pixels.

Maximum number of records returned
In an effort to provide the most efficient performance possible, when running a query or report, the maximum number of records will be limited to this setting. When exceeded, only the records below this setting will be returned. This setting pertains to queries as well as reports.

Number of records printed per page (Unlimited=0 (zero))
When printing a report, this setting determines how many records will be printed per page. If set to zero, all records within the maximum allowed, will be printed continuously. This setting pertains only to reports.

Number of records displayed per page (Unlimited=0 (zero))
When displaying a query or report, this setting determines how many records will be displayed per page. If set to zero, all records within the maximum allowed, will be shown continuously. This setting pertains to queries as well as reports.

Calendar

The calendar is a feature to notify all users of events that are occurring in the company. A calendar event has a title, description, and a note field. Events may be assigned to users and have the user notified through email about the event and a reminder sent to the user before the event occurs. You may view Calendar events on a Monthly, Weekly, or Daily list.

Home
My GSS
Submit an Issue
Search Issues
Lookup Issue #
Unassigned Issues
Calendar
View Day
View Week
View Month
This Month
Events List
Add Event
View Event
Edit Event
Delete Event
Knowledge Base
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Title: Development Meeting 2:00 pm
Description: Development Staff will have a metting at 2pm.
Note: Bring support notes for new development.

Start Date: 24-Oct-2005 2:00PM (EDT)
Duration: 2 hours
Assigned To: Tester, Joe

Email Notification: Yes
Reminder: Yes - 2 hours

		Events assigned to Tester, Joe					

Unassigned Issues

Calendar
- View Day
- View Week
- **View Month**
- This Month
- Events List
- Add Event

Knowledge Base

Projects

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Log Out

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wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat
39							1
40	2	3	4	5	6	7	8
41	9	10	11	12	13	14	15
42	16	17	18	19	20	21	22
43	23	24 1 event 2 hours	25	26	27	28	29
44	30	31					

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Time	Duration	Assigned	Title	Description
2:00PM	2 hours	Tester, Joe	Development Meeting 2:00 pm	Development Staff will have a metting at 2pm.

Knowledge Base

The GSS Knowledge Base is a convenient on-line reference area, provided to facilitate access to product or company information. Articles may include installation instructions, trouble-shooting guides, FAQs, or solutions to common problems. The specific articles and types of information available will vary depending on the material your company has decided to retain in the Knowledge Base.

Any user may view Knowledge Base articles, but you must be authorized to add or edit articles and article categories.

Search

You may search the Knowledge Base for a specific article, or for articles in a particular category or containing a key word. Choose the **Search** option from the Knowledge Base menu. A query screen will be displayed. Enter as many or as few of the criteria fields as you like. Any articles meeting the criteria you specify will be displayed. To review an article, click the link.

If you would like a count of the records meeting your search criteria, choose the **count only** option at the bottom of the search screen and click **submit**.

Articles by Category

This menu option presents you with a list of existing article categories and their corresponding subcategories. When the list is displayed, you need only click the link to view a list of articles submitted under that category or subcategory.

All Articles

Choosing this option will provide you with a list of all available Knowledge Base articles. To review a specific article, click the link.

Add article

You must have specific permission to add an article to the Knowledge Base. If you have this authority, choose the *Add Article* option from the Knowledge Base menu.

Enter the title, category and subcategory of the article you are adding. Keywords may be entered to aid in Knowledge Base keyword searches. Finally, add your article text and click *Add Article* to submit your article to the Knowledge Base.

All Categories

This menu option displays all available categories. Click the **edit** link to change an existing category, or click the **delete** link to remove it.

Add Category

Choose the *Add Category* option from the Knowledge Base menu. Enter your category and press *Add Category* to save your new entry. After the category has been added, you may add a corresponding subcategory by clicking the **edit** link for that category from the category list screen.

Administrative Functions

Assigning an Issue

If an issue has never been assigned, you will need to assign an individual to resolve it. The issue you wish to assign must be displayed before it can be assigned to a technician. There are several ways to display an existing issue. Remember that the following options will only be available to those users allowed to assign issues to others.

If you are assigning an issue that was entered or submitted by you, the issue will appear on your GSS Home page. Select the issue desired by clicking the link and the Issue Detail screen will be displayed.
If you did not enter or submit the issue, you can still display the issue. If you know the issue number, choose **Lookup Issue #** from the menu, and enter the issue number.

If you do not know the issue number, choose the **Search Issues** option from the menu. Key in the criteria to narrow your search and click on the issue desired when the search results are displayed. The search screen is discussed in greater detail in the Locating and Viewing Issues section.

You may also choose the **Unassigned Issues** option. This option will provide a list of all unassigned issues that you may select from. Again, simply click the link to display the issue desired.

Now that you have the issue displayed, select **Assign Issue** from the **Issue Detail** menu, and choose a name from the **Assign To** list. That's all there is to it.

Reassigning an issue

If an issue has already been assigned to someone and you would like to assign it to a different person, simply display the issue, select **Assign Issue** from the **Issue Detail** menu, and choose another name from the **Assign To** list. GSS retains the names of anyone who has ever been assigned to a particular issue.

Recurring Issues

Recurring Issues are pre-established issues that are set up in advance and then scheduled to be submitted automatically. Adding a recurring issue is simple. Click the **Recurring Issues** menu option and choose *Add New* to enter an issue "template" that will be submitted according to the schedule you define: weekly on a certain day, monthly on a certain date, one time only on a certain date, or once a day. To edit or delete this Recurring Issue, locate it by either searching for it, or navigating to it on the Recurring Issues list.

Admin users may view/edit/delete all recurring issues, otherwise the issue templates you may edit/delete will be limited to the ones you create.

Assigning Severities and Service Level Agreements (SLAs)

Once an issue has been submitted, you have the option to assign a severity to it if Service Level Agreements have been enabled on your site. If the user submitting the issue is related to a GSS Group or GSS Organization that has an SLA associated with it, the service level of the SLA will then be displayed while viewing the issue. You can click on the hyperlinked service level name to view its terms.