User Guide

For
Numara FootPrints®
Version 10

Numara Software Inc.

Numara FootPrints User Guide: Rev 10

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Chapter 1: Introduction

Introduction

Numara FootPrints® and Numara FootPrints for Customer Service® are the 100% web-based help desk and customer support tools that are so easy to use and administer, you can get into live production in just a few days. Users and administrators require only a browser to take full advantage of Numara FootPrints' many capabilities. Numara Software developed Numara FootPrints to address the void in the mid-market for an easy to use and comprehensive system that puts control in the hands of the help desk or support manager—without high costs, additional programming, or complex administration.

Numara FootPrints is extremely flexible, scalable, and customizable. This proven, award-winning 100% web-based service desk tool eliminates expensive training, consulting, database programming, and staff additions to manage support automation software from your list of challenges.

Numara FootPrints can be used for multiple, simultaneous workspaces and support multiple languages for users and groups, and you can leverage Numara FootPrints' capabilities across multiple locations and corporate functions to expand the reach of your issue management and related communication.

Different Uses for Numara FootPrints

While many people purchase Numara FootPrints to solve one specific functional need, such as tracking internal helpdesk, external support center/CRM, or development/bug tracking activity, you will find that it can be used for a variety of business functions and departments, supporting both employee and external customers.

Some of the departments or business functions that can benefit from using Numara FootPrints for issue management include:

- Corporate Help Desk
- Asset Requisitioning
- Service Catalog
- Configuration Management
- Software Change Management
- Customer Survey
- Facilities Management
- Human Resources Management
- Incident/Problem Management

- Issue Tracking
- Resource Management
- Sales Tracking
- Training

The primary feature that makes **Numara FootPrints** so flexible is that it is Workspace-based. Each Workspace is a separate sub–database within the system that can have its own fields, forms, users, and settings. It is this feature that enables you to create different areas within the system for different departments to use.

What This Guide Contains

This guide contains all the concepts and information essential to the **FootPrints** Agent user. You will learn basic **FootPrints** concepts, including: how to navigate through the **FootPrints** Homepage and Toolbar; how to create, edit, search for and report on different types of Issues; how to use email for notification and Issue changes; how to schedule your work by using the **FootPrints** Calendar. Many of the features accessible to you will depend on how your Workspace Administrator configured your **FootPrints** Workspace. When in doubt, check with your Administrator.

Getting Help

Help is available from within **FootPrints**. To access the online Help, click the **Help** icon on the **FootPrints** Toolbar. A new browser window will appear containing information tailored to Customer users.

- The Help system includes a Table of Contents. Use this to navigate through the help topics.
- A Glossary is available to give definitions to common terms used in **FootPrints**.
- The Index and Search features can be used to find topics by keyword.
- Context–sensitive help links are available throughout the **Numara FootPrints** system – look for the icon.

Other documentation is available, including:

- **Numara FootPrints Administrator's Getting Started Guide**—Covers installation and basic customization of **FootPrints**.
- **Numara FootPrints Reference Manual**—Complete documentation on all aspects and features of **FootPrints**.
- **Numara FootPrints Change Management Guide**—Provides best practices for Numara FootPrints Change Management as well as the details of configuration and implementation.

Technical Support

For questions regarding **Numara FootPrints**, and technical support, contact the Numara Software Support Team:

Phone 800.222.0550 ext. 2 (USA and Canada)

732.287.2100 ext. 2 (International)

Email footprints.support@numarasoftware.com

Web http://www.numarasoftware.com/support

Numara Software Support hours are Monday through Friday, 8:00 AM to 8:00 PM Eastern Standard Time. You can search the **FootPrints** knowledge base any time at the web address above. For our International users, please contact your local distributor.

SUPPORT

Commercial support for ActivePerl Enterprise Edition is available through ActiveState at:
http://www.ActiveState.com/Support/Enterprise/
For peer support resources for ActivePerl Enterprise Edition issues see:
http://www.ActiveState.com/Support/

What's New in Numara FootPrints 10?

New Feature Highlights

- Numara Asset Management Platform Integration
- Improvements to the homepage grid

Practical and Flexible IT Service Management for the Real World

The latest release of the award-winning Numara® FootPrints® product is all about saving you time and money. Numara FootPrints 10 features Integration with the Numara Asset Management Platform 10, easier and safer data migration, an optimized user experience, increased alignment with industry best practices, and productivity improvements. Numara FootPrints 10 is the same great product you're used to, with new functionality to accelerate your IT Service Management capabilities.

New! High degree of integration with the Numara Asset Management Platform provides greater functionality and ease-of-use.

New! Improvments to the homepage grid make it easier to show what you want when you want it.

For details on what's new in FootPrints 10, refer to:

- What's New in Numara FootPrints 10?

Numara Software FootPrints Versions and Add-ons

The following versions of Numara FootPrints are available:

- Numara FootPrints—The web-based help desk and customer problem management solution for Windows, UNIX, and Linux servers.
- Numara FootPrints for Customer Service—The web-based customer service desk automation solution
- Numara FootPrints Base Starter Pack—The web-based help desk and customer problem management solution for Windows/SQLExpress or Windows/SQL Server only. This is the same great FootPrints customers have always used, but geared towards smaller business. Base Starter Pack customers can purchase Change Management and Mobile. Limitations include:
  - a maximum of fifteen named agents
  - Windows/SQLExpress or Windows/SQL Server only
  - no concurrent licenses
  - no ability to add CMDB or SQL Link
  - a maximum of three workspaces plus one survey workspace.
- Numara FootPrints Hosting Service—All the power of Numara FootPrints, hosted by Numara Software, Inc..

NOTE

FootPrints for Exchange is no longer available, but customers can continue to enjoy the same functionality by upgrading to Numara FootPrints.

The following add-on modules are also available for integration with Numara FootPrints:

- Numara Configuration Management (with Service Catalog)—ITIL compliant add-on module that provides complete Configuration Management functionality. Import assets and define your entire configuration. Configuration management data can be imported to Issues. Also features reporting.

NOTE

The Extended Starter Pack is required to purchase the Configuration Management module. Please contact your salesperson for more information about obtaining the Extended Starter Pack.

- Numara FootPrints Sync—Two-way, dynamic synchronization of calendar appointments, tasks, and contacts with the user's desktop, PIM (Personal Information Manager), or handheld productivity tool.
- Numara Asset Management—Auto-discovery of PC assets, network management, and software deployment using any combination of the following:
  - Numara Asset Manager—Complete, up-to-the-minute PC hardware and software identification.
  - Numara FootPrints Integration with Microsoft System Center Configuration Manager/SMS—Allows help desks agents to dynamically access PC asset data while they're working on an Issue from within Numara FootPrints.
- Numara FootPrints Dynamic Address Book Link—Gives access to multiple LDAP-based and SQL-based address books.

- Numara FootPrints Integration with Right Answers—Comprehensive Knowledge-Paks with hundreds of thousands of solutions for more than one hundred fifty applications.
- Numara FootPrints Telephony—An integrated, hosted contact center service that works with your Numara FootPrints software, offering call centers and service desks advanced, skills-based call routing that automatically transfers incoming customer requests to the right help desk agent or customer service representative. Numara FootPrints Telephony is an integration, not an add-on.
- Numara FootPrints Change Management—Enables organizations to develop their own approval process for Issues, with no programming. In Numara FootPrints Change Management, approvers are designated for specific Workspaces. When an Issue meets approval criteria, the approvers are notified that an Issue awaits approval. The approvers then give or withhold approval. When an Issue is approved or rejected, it is moved to another stage in the process.
- Numara FootPrints CRM Bridge—Integration with some of the most widely-used sales automation tools. This integration helps organizations tie their web-based customer support tracking and automation with their web-based CRM sales tracking process to give sales and customer support teams direct access to the latest customer support interactions at any time. From within the sales automation tool, sales representatives can see active support issues for their customers in Numara FootPrints. From within Numara FootPrints, sales representatives can access their customer Address Books that are stored in the sales automation tool. The following sales automation tools are integrated via the Numara FootPrints CRM Bridge.
    - Numara FootPrints Integration with MS CRM
    - Numara FootPrints Integration with Salesforce.com
    - Numara FootPrints Integration with Sales/CRM powered by SalesNet®
- Numara Remote—Enables an Agents to take control of a customer's PC.

PerlEx Modules, Packages, and Extensions

ActivePerl Enterprise Edition is the up-to-date, quality-assured perl binary distribution from ActiveState. Current releases, and other professional tools for open source language developers are available at:

http://www.ActiveState.com

Chapter 2: Concepts

Workspaces

FootPrints stores and tracks information in Workspaces. A Workspace is a separate sub-database within the system which can have its own custom fields, options, and users. There is no limit to the number of Workspaces that you can create within FootPrints. You may choose to keep all of your data in a single Workspace or you can create multiple Workspaces. For example, one Workspace can be used for help desk activity while a second Workspace can be used for internal bug tracking.

New workspaces can only be created by System Administrators.

Issues

A FootPrints Workspace comprises a set of related Issues. "Issue" is the default name given to a FootPrints record. Each Issue is a numbered record in the FootPrints Workspace database around which all help desk and problem tracking activity centers.

All Issues have some built-in content in the form of required fields (i.e., mandatory data required for the database), as follows:

- Title—a short description of the Issue
- Priority—the urgency of the Issue
- Status—the current state of the Issue; Open and Closed are required status options, but administrators can create as many categories of status (e.g., Pending approval), as they wish.
- Description—a description of the Issue, usually containing much more detail and history than the Title.
- Assignee—the person or persons assigned to track or resolve the Issue.

Not all organizations use the term "Issue" as the label for a record of this type. Administrators can customize FootPrints to apply whatever label is appropriate in your local culture. Administrators can change the name "Issues" to "Tickets", for example, so that wherever the word "Issues" appears by default in FootPrints, the word "Tickets" is displayed.

NOTE

During installation, the administrator is given the chance to change the default term “Issue” to another name, such as “Entry,” “Call,” or “Ticket.” For consistency, this manual always refers to FootPrints records as “Issues.”

Types of Issues

FootPrints provides a number of different types of Issues:

1. Issue—An Issue is normally used to log any event or problem. The name for this may differ (Ticket, Entry, etc.) depending on how your system is configured. An Issue can be opened, assigned, worked on, and closed by internal Agent users and Administrators. FootPrints can automatically send notification email whenever an Issue is worked.
2. Request—A Request is a preliminary Issue that is submitted by a Customer. FootPrints Agents can then “take” the Request and turn it into a regular Issue, or Requests can be automatically assigned to one or more Agents. (Administrators can read the section on Auto Assign in the Numara FootPrints Reference Manual for more information). Your Administrator can tell you how Requests are handled in your organization.
3. Quick Issue—Quick Issues are templates that contain pre-filled information for standard types of Customer problems and requests. For example, a Quick Issue template for "Password Reset" would start out pre-filled with a description of the problem, the problem categories pre-filled with "Network" and "Password Reset", and perhaps a Status of "Closed". The Agent only needs to fill in the user's contact information to submit the Issue. The Workspace Administrator can create an unlimited number of templates
4. Master Issue/Subtask—Sometimes an Issue needs to be broken up into separate subtasks to be completed by different users. When a subtask is created for an Issue, the originating Issue automatically becomes a Master Issue of that subtask. Multiple subtasks can be created for an Issue.
5. Master Quick Issue—Quick Issue templates can also be defined to create Master Issues and related subtasks automatically, for example, to define the New Hire process.
6. Global Issue/GlobalLink—Global Issues are used to designate important or frequently reported Issues that will affect many users. Global Issues can be broadcast to all Agents, are displayed on the Agent FootPrints Homepage, and can optionally be displayed for Customers to subscribe to. Whenever a new Issue is reported with the same problem as an existing Global Issue, the Agent (or, optionally, the Customer) can link the Issue to the known Global Issue (called GlobalLinks). Global Issues can be closed simultaneously with their GlobalLinks.
7. Solution—Solutions are a special type of record in FootPrints that make up the Knowledge Base. They are used to describe solutions to common problems, frequently asked questions, document procedures, etc. A Solution can be created from scratch or spun off from an Issue. Solutions can be public or internal and they can be configured to require an approval process before they are published.

NOTE

Issues and Requests can also be submitted and updated via email. Please refer to the section on submission via Emailfor more information.

Linked Issues

When Issues are "linked", it means that an association has been created between the Issues. The association is displayed whenever the Issue is displayed in FootPrints. Associations of this type denote that there are similarities between the issues that the person who established the link wants everyone to see.

In the case of Global Issues, links are called "GlobalLinks". These are Issues linked to the Global Issue because they describe the same or similar problem, but are reported by different users.

Issues linked to a Master Issue are called "Subtasks". These are Issues linked to the Master Issue because they describe a subset of activities to be performed in resolving the Master Issue.

User Types and Roles

Agents and Customers

FootPrints supports different levels of user privileges for users with different needs. An "Agent" user account is intended for specified internal users, such as help desk Agents, customer service representatives, or engineers. A "Customer" account is intended for employee end-users or external Customers, allowing those users to submit and track their own requests and to search the knowledge base.

FootPrints comes with a number of built-in user types, called "roles". Custom roles can also be created by the Administrator to define permissions for different groups of users.

Here is a breakdown of the built-in roles:

- Agent roles:
  - Agent—A standard, full-strength user. This user type commonly includes: help desk Agent, call center Agent, developer, engineer, manager, and workspace member. Agent users have the ability to use all of the basic functions of FootPrints, including creating, viewing, and editing Issues and running queries.
  - Workspace Administrator—In addition to Agent privileges, a Workspace Administrator can administer an existing Workspace, including adding custom fields, setting options, and adding users.
  - System Administrator—In addition to Agent and Workspace Administrator privileges, the System Administrator has control over the whole FootPrints system, including administration of any Workspace, adding new Workspaces, and managing licenses.
  - Customer roles:
  - Read KB—View and search the Knowledge Base.
  - Read KB/Requests—View and search the Knowledge Base and check the statuses on Requests (entered by an internal user or via email).
  - Read/Submit—In addition to the functionality described above, can submit Requests via a FootPrints web interface.
  - Read/Submit/Edit—In addition to the functionality described above, these users have limited edit privileges of their own Requests.

More About Customers

Customer users have a number of components:

- User Account—This is the ID and password of the Customer. Users can have unique IDs and passwords or they can share a generic ID and password. This record is kept in the database.
- Contact Record—The contact information for the user is kept in the FootPrints Address Book or dynamically read from an LDAP or other External Database/SQL source. The data kept depends on the fields that exist in the Address Book.
- Primary Key—The Customer user account and contact records are linked via the Primary Key field. This is a field in the Address Book, such as User ID or Email Address, that uniquely identifies the user.
- Role—The permission level for the user. Built-in and custom roles are available.

Supervisors

FootPrints contains the concept of "Supervisors". Agents can be designated as assigned to specific supervisors, which makes it easier to designate where emails go when, for example, there is an Issue escalation.

Permissions

"Permissions" refers to the level of restriction applied to any user, whether it is an Agent, Administrator, or Customer. As an example, Agents can be restricted from submitting Solutions to the Knowledge Base; therefore, such Agents would not have "permission" to submit Solutions to the Knowledge Base.

Configuration of Permissions

Permissions are configured by Administrators. Workspace Administrators can configure permissions on a Workspace level, allowing a specified role (e.g., Agents) to perform or not perform certain actions. System Administrators can configure permissions on either a workspace level or system-wide. For example, Customers could be restricted from submitting their own Requests in a specific workspace, allowing them to submit Requests to other workspaces, or they could be restricted from submitting Requests to any Workspace.

Permissions can also be set on the field level. That is, users can be prevented from entering data into designated fields without the appropriate permissions. Field level permissions are set by either a Workspace Administrator for a specific workspace or system-wide by a System Administrator. With field level permissions, there are two ways in which users are prevented from accessing the field to enter data. In the first instance, the field may be visible to the user, but the user would be prevented from entering data into the field without permissions. In the second instance, the field may be invisible to specified roles.

Permission Assignment

Permissions are assigned by role. That is, Administrators determine which permissions a specific role is allows. The Administrator then can determine which individuals are assigned that role. Because Administrators can create new roles, the affect of permissions can be limited to a small group or even an individual. For example, if an Administrator wants only a single person or a small number of people to be able to add Solutions to the Knowledge Base, the Administrator could restrict all Agents from adding to the Knowledge Base, then create a new Agent role, assign the appropriate users to the new role, and allow the new role to add Solutions to the Knowledge Base.

Field-level Permissions

As stated earlier, permissions refers to the level of restriction applied to any user, whether it is an Agent, Administrator, or Customer. For example, Agents can be restricted from submitting Solutions to the Knowledge Base; therefore, such Agents would not have "permission" to submit Solutions to the Knowledge Base. Field-level permissions restrict which fields are accessible to users. Field-level permissions, like regular permissions, are defined by role. For example, Issues can sometimes become exceptionally lengthy and cluttered in terms of the number of fields that are displayed, but not all users need to see all fields. Field-level permissions can be used to "clean up" the Issues page.

As another example, field-level permissions can be used to keep some fields hidden until such time as they become relevant, such as fields created for system test being hidden until a certain status is reached.

How Roles and Teams Work Together

Roles and teams are two user elements in FootPrints that work together:

- Team—Users are organized in teams for assignment purposes.
- Role—Users are granted permissions on what they can do within their team and within the FootPrints workspace via a user role.

For example, while the "Level 1 Support Team" may be made up of five users, one of those users might be the team leader and the other four are support technicians. All five users share the same "Level 1 Support Team", but the team leader can be assigned the "Team Leader" role and the other members can be assigned the "Technician" role.

Other Aspects of Roles and Teams

- One Role, Many Teams—While a user can be a member of multiple teams, a user can only have one user role within a Workspace. Therefore, within a Workspace, a user has the same permissions regardless of the team to which he or she belongs.
- Team leaders—Team leaders can be designated for a Team. This makes a convenient method for designating where an email should go when an Issue Escalation occurs.
- Customers—Customers cannot belong to teams because they cannot be assigned to Issues. Customers are organized by "organizational unit". (The organization unit is an optional property of a contact in the Address Book. Examples of an organizational unit include "Department", "Business Unit", or "Company". If an organizational unit is specified, the contacts in the Address Book are grouped by organizational unit.) Customers can, however, be assigned to a customized role in order to create a special set of permissions.
- Same Name for Role and Team—While the ability to configure roles and teams separately gives you more flexibility, you can choose to give all of the users in a team the same permissions. In that case, you might, optionally, give the role and the team the same name.
- Optional—If the functionality provided in roles and teams is not needed by your organization, you do not need to configure these features at all. Users can be assigned individually without teams and can inherit the permissions of the built-in roles.

Customer Self-service

Customers in FootPrints have access to many self–service features. Depending on their permission level, Customers can submit Requests, track the status of their Requests, search the Knowledge Base for Solutions to their problems, etc. This user type is appropriate for both employee Customers and external Customers of your organization.

With respect to security for self-service Customers, FootPrints can authenticate against multiple login methods. This allows, for example, new customers to be validated against the Windows password file, while Agents are validated against the company's master /Active-Directory/LDAP contact book.

Fields

A "field" is a section of a web form that can accept input. Fields generally accept either text or numbers. In addition, fields can accept a mouse click that selects an option from a list or a mouse click that checks or unchecks a box.

Field Types

The following workspace field types are supported:

- Character (single or multiple line)—This type of field can contain any type of data, such as alpha, numeric, or special characters. Single-line character fields accept one line of data, while multiple-line character fields accept an unlimited number of lines of data. There is no effective limit on the amount of text in a field.
- Integer—Accepts integers.
- Real Number—Accepts positive integers or decimal numbers (no negative numbers). If FootPrints is running on MS SQL Server or MySQL, you will be asked to include Precision and Scale for the real number when configuring the field. If an unacceptable value is entered into a real number field, such as a value that includes alphabetical characters, has too many digits after the decimal place, or is too wide for the field as it has been configured, FootPrints generates a warning before you can leave the page.When creating a new real number field, MS SQL versions of FootPrints asks for precision and scale on the field maintenance page. This is necessary since SQL Server real numbers default to four decimal places, which might not be what you want displayed if you are entering currency information.
- Date—Accepts valid dates (format based on system or user preference).
- Date-Time—The user can select both a date and a time for this field type. Can optionally be linked to the Calendar. A default link to the calendar(s) can be changed at the time of Issue creation by the Agent. In addition, the field can be configured as a link to the personal calendar or personal and workspace calendars by default. by clicking the radio button for either linking to the personal calendar or linking to the personal and workspace calendars when the Issue is created.
- Drop-down—Offers a pre-defined drop-down list of choices from which the user chooses one of the options.
- Multi-select—Allows the user to select multiple choices from a pre-defined list.

- **Checkbox**—Offers a checkbox for users to select in the Issue form. In searches, reports and on the Details screen, the values "On" and "Off" are displayed, or alternate values can be defined. Mandatory/optional permissions do not apply to checkboxes; this field can be checked or left unchecked by the user.
- **Web site**—Accepts URL addresses (of the form http://*server.name.com*). Appears as a hypertext link on the Details page of an Issue.
- **FTP**—Accepts fully-qualified FTP addresses (of the form ftp://ftp.*sitename*.com). Appears as a hypertext link on the Details page of an Issue.
- **Email Address**—Accepts Email addresses. Appear as a hypertext link on the Details page of an Issue.
- **Add Tab/Section**—Adds a section header or new tab, depending on whether you are using the expandable/collapsable sections version of **FootPrints** or tabs. When a tab or section is added, it is automatically placed at the end of the set of tabs or sections. The administrator must use the arrow keys to move the tab or section into its appropriate position on the page and must also move the fields to be associated with that tab or section individually.

Built-in Fields

Built-in fields are fields that are included in the **FootPrints** Workspace templates at installation. Some of the built-in fields cannot be removed, but the labels on built-in fields can be changed. For example, "Title" can be changed to "Incident", but the field itself must remain on the Issue form and must be filled out in order for an Issue to be submitted, i.e., accepted by the system.

To see which Workspace templates contain which built-in fields, refer to Chapter 12: Sample Workspace Templates.

Mandatory and Optional Fields

Mandatory fields are fields that must be populated in order for the Issue to be successfully submitted.

Optional fields are fields that may or may not be populated when an Issue is submitted. If all mandatory fields are populated but one or more optional fields are not populated when an Issue is submitted, the submission should be successful.

Field Dependency

"Field dependency" refers to a configuration in which the data entered in one field changes the options in the next field. For example, if you have a drop-down field labeled Problem Type and you select Printer from its drop-down list, the next field would offer options that are specific to printer problems. If, instead of Printer, you had select Network, then the next field only displays options related to network problems. FootPrints has a facility for creating field dependencies, so that users can be lead through a series of fields, each of which contains options that are specific to the choice made in the previous field.

Multiple dependencies can be configured per workspace and multi-level dependency groups can be created to funnel the user to categories and sub-categories.

There are two kinds of field dependencies supported in FootPrints:

- Pop-up window containing dependent fields—For this type of field dependency, a drop-down menu is designated as a "decision field". A different pop-up window is displayed depending on which option is selected in the decision field (drop-down menu). Each of the pop-up windows is configured with your choice of fields. For example, assume that there is a field called Resource. The options for Resource are Hardware and Software. If the user selects Hardware from the menu, a pop-up window is displayed with a drop-down menu field called Asset, a multi-line character field called Description, etc. The drop-down menu might contain a list of hardware assets, such as Printer or Edge router, and the Description field is for describing the problem, and so on. If, however, the user selects Software, a pop-up window is displayed with a drop-down menu field called Application which lists the applications, such as Excel or Visio, and a second field called Server, which lists DNS names.
- Dynamic drop-down dependency groups—A drop-down menu is designated as a decision field for this type of field dependency as well. However, in this case, a pop-up window is not the dependent factor. Instead, there is a set of subsequent drop-down menus on the same page. The choices that are displayed in each of those drop-downs depend on the choice made in the preceding drop-down field. An example of this would be a drop-down menu field called Software that lists software products. The next field is called Release. The user selects a software title in the Software field. The values in the Release drop-down change depending on which software product was selected in the decision field. The next drop-down menu field might be called Known Problems. This contains a list of known problems that are based on the specific software product and release. If a different software product is selected, different release numbers are displayed and, depending on the release selected, different known problems are displayed.

  This type of field dependency is very useful in setting up multi-level groups of dependencies that drill-down and refine the information being submitted.

Workspace Schema

The Workspace Schema is a display of the order of the fields in a workspace. The Workspace Schema is useful when you are attempting to import data to FootPrints or export data from FootPrints. The Workspace Schema can be used to check that the tables of data match up.

InstaCalc Fields

FootPrints allows you to create simple mathematical formulas using Workspace fields. The formulas allow multiplication, division, addition,and subtraction as well as the use of the unary minus and parentheses. Formulas follow the standard order of operations.

Address Book

The **FootPrints** Address Book is a database of contact information for your end users, whether they are employees, remote users, or customers. The contact data can be kept in **FootPrints** or can be dynamically read from an outside source, such as Microsoft Exchange, Active Directory, or other LDAP source. The LDAP option is only available in the demo or if you purchased the **Dynamic Address Book Link** add-on module. When the **Dynamic Address Book Link** is used, individual contacts cannot be added to the **FootPrints** Address Book directly. If you wish to add someone to the Address Book when using the Dynamic Address Book Link, you must add the contact to the LDAP source. Supported contact databases include Microsoft Exchange 5.x/2000, Netscape iPlanet, Lotus Notes, and Novell Directory Services.

NOTE

FootPrints supports Secure LDAP (LDAPS). For additional information on LDAPS support, contact Numara Software Support.

Address Book data can also be imported from an outside source, such as a SQL database.

When an Issue is created in **FootPrints**, it can be linked to a contact, so that the information about the end user is available to technical users looking at the Issue.

A **FootPrints** Address Book is made up of fields, just like an Issue. When a Workspace is built, the fields in the Address Book are dependent on the Workspace template that was selected. Administrators can modify the fields in the Address Book as appropriate.

The Address Book contains two additional properties:

- **Primary Key**—The primary key is a unique identifier for each contact in the Address Book. If the customer self-service feature is used, the primary key is the ID that customers use to log into **FootPrints**, along with a password. This field should be both present and unique to all contacts. "User ID" is the recommended field and also the default for all templates.
- **Organizational Unit**—The organization unit is an optional property used to organize contacts in the Address Book. Examples include "Department", "Business Unit", or "Company". If organizational unit is used, the contacts in the Address Book are grouped by the field.

Contacts

"Contact" is the default name given to a record in the **FootPrints** Address Book. Normally this contains a customer's name, email address, phone number, etc., but a contact can be any record in the Address Book containing any number and variety of fields.

Contact data can be added to the database in a variety of ways. Contacts can be typed in directly, one-by-one, or imported from another source. In addition, FootPrints allows you to dynamically link to any LDAP source and populate the Address Book from that source. This has the advantage of allowing you to maintain only the one LDAP resource. Any changes made to the LDAP resource are reflected dynamically when contact information is accessed in FootPrints.

Master Contact Record

A master contact record allows an Agent to store information common to an organization, such as a company name or department, in a record similar to that of an address book contact. Upon adding or editing a contact who is a member of an organization for which a master contact record exists, the Agent may pre-load the master contact record information into the contact.

For details on using the Master Contact Record, refer to Master Contact Record Actions.

Resolving Issues

Issue resolution can be accomplished in a number of ways. The first and most obvious is by Agents directly working on an Issue. In a normal workflow, an Issue may be created or received as a Request from a Customer, an Agent is assigned when the Issue is created, and the Agent resolves and closes the Issue.

Other ways in which Issues can be resolved outside the normal workflow described above are with:

- The Knowledge Base
- Frequently Asked Questions (FAQ)

Knowledge Base

The Knowledge Base is a place to record, organize and manage important information for a FootPrints Workspace database. This can include, but is not limited to: solutions to common problems, answers to Frequently Asked Questions, patches, and documents. By using the FootPrints Knowledge Base feature, you can turn the past experiences of individual customers and agents into a database of Solutions for all Workspace members. This can assist Agents in finding quicker resolutions to recurring problems and in empowering customers to find the answers to their questions without submitting a request.

Records in the Knowledge Base are called "Solutions". Solutions can be developed specifically for the Knowledge Base or can be Issues that were resolved and contain a solution to a problem. Users may be required to obtain an "approval" before a Solution that they submitted is accepted into the Knowledge Base. Approvals are described in more detail below.

Internal Knowledge Base

Solutions can be designated to go into the internal Knowledge Base. The internal Knowledge Base is only available to internal FootPrints users, i.e., it is not accessible by anyone in a customer role. Internal users can also be configured in roles to restrict access to the Knowledge Base.

Public Knowledge Base

Solutions can be designated to go into the public Knowledge Base. The public Knowledge Base is accessible by all internal users as well as any customer with permissions.

External Resources

In addition to the FootPrints Knowledge Base, which comprises Issues that are designated as Solutions, FootPrints can provide links to external Knowledge Bases. FootPrints comes with links pre-configured for the following external Knowledge Bases:

- Adobe
- Apple
- Google Groups
- Hewlett-Packard
- Microsoft Technet

An additional external Knowledge Base is Knowledge-Paks® Online (from RightAnswers, LLC), which is described below.

Administrators can add external Knowledge Bases to FootPrints.

Knowledge-Paks Online

Knowledge-Paks OnLine, a product of RightAnswers, contain thousands of solutions to common desktop and other IT Issues. Knowledge-Paks OnLine is only available if you have purchased and enabled the Knowledge-Paks add-on module from Numara Software.

Approvals

By default, Agents in FootPrints can submit Solutions to both the public and internal Knowledge Bases. Using role permissions, Administrators can limit designated users from submitting Solutions to the Knowledge Bases, and/or can require designated users to receive approval before their Solutions are published. This allows the Administrator to have better control over which information is published to Customers and to review Solutions before Customers see them.

When Agents are required to receive approval before publishing Solutions, one or more users must be designated as approvers. These users (usually Administrators) receive email when a Solution is submitted for approval and can approve, edit, or reject the Solution.

Once approvals are configured for at least one user role, the approval process is in place automatically.

Frequently Asked Questions

In FootPrints, Frequently Asked Questions (FAQs) are categories that are available to Agents and Customers (who have appropriate permissions) when searching the Knowledge Base. These categories are created and maintained by the Workspace Administrator. The categories are defined by advanced search criteria, such as problem type, platform, software version, etc., and named and saved by the Administrator. Each time a category is accessed, it returns the latest Solutions that match the criteria defined for that category.

The FootPrints idea of a FAQ page is not like other FAQ pages with their question and answer format. Instead, a FootPrints FAQ is more of a pre-defined search category within the Knowledge Base that displays all of the Solutions that were found during the search. It is a time-saving device that helps organize the Solutions in the database for the user. A FootPrints FAQ can also contain hierarchies of categories.

Real-time Resolution Tools

"Real-time resolution tools" refers to the Instant Talk™ and Remote Control tools that are integrated into FootPrints. These are handy tools that can enable Agents to resolve Issues in collaboration with customers in real-time.

Instant Talk

The Instant Talk feature allows customers to chat with Agents, speeding the resolution of Issues. Internal users can also chat to other internal users. No special client software is required; users only need their web browser.

Remote Control

Numara Remote allows you to control a user's desktop remotely for troubleshooting purposes. FootPrints includes an email feature that can be used to send instructions or downloading and installing the Numara Remote Host application to customers.

There are two parts to Numara Remote:

- Host—The Host resides on the customer's machine, i.e., the machine to be controlled.
- Guest—The Guest is used to connect to the customer's machine and display the desktop for that user.

The Host and Guest can reside on different machines, and even on different networks, as long as they can communicate via TCP/IP (dial-up is not supported). The Host and Guest machines can also be on different platforms.

Asset Management

Asset Management is an add-on module of FootPrints. Asset Management enables the auto-discovery of PC assets, network management, and software deployment using any combination of the following:

- Numara Asset Management Platform—Complete, up-to-the-minute PC hardware and software identification.
- FootPrints Integration with Microsoft SMS—Allows help desk Agents to dynamically access PC asset data, acquired with Microsoft SMS, while they're working on an Issue from within FootPrints.

Numara Asset Management Platform

With Numara Asset Management Platform technology, you can track all hardware and software assets. Numara Asset Management Platform allows Agents to dynamically identify which PC assets (including hardware and software) are on the corporate network, where they are, how they are configured, and also record changes made to them. Routers and other network elements are also identified. Asset data is fully integrated with FootPrints Issue management. Agents can get automatic snapshots of users' configurations, including platform, hardware, and software information and save the information as part of the Issue record.

Integration with Microsoft® Systems Management Server (SMS) Inventory

If your organization uses Microsoft® Systems Management Server (SMS) for tracking PC-based inventory, you can take advantage of SMS inventory data from within FootPrints. FootPrints with Microsoft® System Management Server (SMS) integration allows help desk Agents to dynamically access PC asset data for a user directly from within an Issue in FootPrints. This automated process saves time, helps Agents solve users' issues quickly, and ensures data accuracy.

When creating or editing an issue from within FootPrints, you can directly view hardware, software, and network information that's contained in the SMS inventory database for a particular machine or user. The data can then be imported into the FootPrints Issue. This information becomes part of the Issue's history and is searchable from the FootPrints Advanced Search and Reporting tools.

Another Asset Management Tool–FootPrints Deploy powered by Prism Deploy®

FootPrints Software Deployment, powered by Prism Deploy, installs and updates software on any PC, laptop, or server throughout your entire organization. Featuring mature, award-winning software deployment technology, a drag and drop deployment console, and a unique Conflict Checker utility, FootPrints Software Deployment makes software deployment very simple.

Authentication and Different Authentication Methods

Authentication is the process of identifying an individual, usually based on a username and password. In security systems, authentication is distinct from authorization, which is the process of giving individuals access to system objects based on their identity. Authentication merely ensures that the individual is who he or she claims to be, but says nothing about the access rights of the individual.

FootPrints supports several modes of user/password authentication. Administrators have the option of using FootPrints' internal encryption techniques, in which FootPrints maintains its own database of users and passwords, FootPrints can let the web server perform the authentication, or FootPrints can authenticate by interfacing with either an LDAP directory server or the Windows NT user list on Windows, and UNIX/Linux user list on UNIX systems.

FootPrints supports the following methods of password verification:

- FootPrints authentication (default)
- LDAP authentication
- Windows NT/2000 authentication (Windows NT/2000 only)
- UNIX authentication (UNIX only)
- Web server authentication

Searching and Reporting

Searches

When FootPrints conducts a search, it means that the user supplies some criteria (a keyword, an Issue number, a date range, etc.) and FootPrints assembles and displays all of the records that meet the search criteria. Searches can be conducted on specific fields (for example, search the Problem Type field for all records that contain the word "Printer" in that field) or on all fields (for example, the user supplies keywords such as "wireless data" and FootPrints searches all of the fields in all of the records for those words). Searches can also be conducted on a date or range of dates (e.g., all Issues that were opened between April 1, 2007 and April 30, 2007).

FootPrints contains a number of search facilities that allow you to search and locate specific Issues in the database and create custom queues for the Homepage:

- Quick Search—Available from any page in FootPrints. Search by entering a keyword, title, or Issue number.
- Built-in Queues—These are lists on the FootPrints Homepage that, when selected, assemble and display records according to predetermined criteria. For example, the user might click on the My Assignments queue, which would then display all of the Issues assigned to the user.
- Advanced Search—Complex search on all fields and criteria.
- Saved Searches—Save advanced search criteria to create queues available from the FootPrints Homepage.
- Cross-workspace Searching—Search for issues across multiple Workspaces.

NOTE

Search results can be further refined by using Filtering. Refer to topic titled Below the Toolbar for details on Filtering.

Reports

Reports quantify and format information stored in the database. When the user requests a report, it means nothing more than deciding which field data to retrieve and how the output should look. FootPrints then provides the information in the requested format. The key to making Reports that are useful is deciding what sort of information you want to have before you run the Report. For example, if you want to determine how many issues were in an active state (i.e., not yet closed) on a specific date and how many of those particular issues were then closed one month later, you can specify those criteria to FootPrints and request a Report. FootPrints then connects to the database, counts these items for you, and generates a Report that displays the data in the format you requested.

Types of Reports

The following Report types can be obtained from FootPrints:

- Single Issue Report—Create a report on a single Issue.
- Quick Report—Create a report on a set of Issues displayed on the Homepage.

- **Custom Reports**—Create custom reports with custom criteria and formatting options, including graphics and multi-level metrics.
- **Saved Reports**—Access saved custom report templates.
- **Shared Reports**—Access report templates that are shared by different users.
- **Workspace Flashboard**—Display an up-to-the-minute, customizable, graphical representation of help desk and workspace activity.
- Personal Flashboard—Display an up-to-the-minute, customizable, graphical representation of the individual's activity and the activity of Teams to which the Agent belongs for the current Workspace.
- **Metrics**—Generate reports for statistical and historical analysis.
- **Cross-workspace Reporting**—Create custom reports across multiple workspaces.
- **Time-tracking Reports**—Generate time-tracking and billing reports.
- **Report Templates**—Create single-issue report templates for printing out Purchase Orders, Work Orders, RMA's, etc.
- **Configuration Management Reports**—Only available with the Configuration Management Add-on module, provides data about Issues that match the Configuration Management criteria.
- **Change Management Reports**—Only available with the Change Management Add-on module, provides data about Issues that match the Change Management criteria.

Time-tracking

Time-tracking is used to track the time Agents spend working on Issues. Time can be tracked automatically by the system or manually by the Agent. Agents can be assigned hourly billing rates to be used in calculating the monetary amounts spent on Issues in addition to time spent. Time can be tracked for any Agent when creating Issues and when editing Issues. The total time counted over all sessions is accumulated and stored for the Issue. If this feature is not needed, it can be disabled for the Workspace.

This data can be used to create time-tracking reports, which can be used for billing, or to track any time-related information, such as how long one or more users spent on certain kinds of Issues. A **FootPrints** time-tracking report returns totals and averages of all time-tracking data included in the report and individual time-tracking information for each Issue reported. In addition to returning specific data for billing purposes, the time-tracking report can be used to return averages and totals for a specific internal user, Customer, status or priority type, etc.

Numara FootPrints Calendar

The **FootPrints** Calendar is a web-based calendaring system that is fully integrated with **FootPrints** issue tracking and customer problem management. Agents and Administrators can track personal and workspace-wide appointments, schedule meetings, jobs, and more. Calendar appointments can be linked to **FootPrints** issues. Recurring appointments can be created that automatically create new Issues at the next recurrence. Appointments can be synchronized with Microsoft Outlook via email or, if you have the FootPrints Sync add-on module, with a number of supported Personal Information Managers (PIMs). Work schedules can be defined for the Workspace and for individual Agents, including regular work hours, holidays, vacations and sick leave, which can reduce conflicts when scheduling work. Agents can set their FootPrints interface to their local time zone so that all appointments and other times appear in local time rather than the time on the server.

There are three options for the FootPrints calendar system:

- Workspace—The Workspace Calendar can be used to track appointments for all Agents and Teams for a FootPrints workspace. Each Workspace has its own calendar.
- Personal—Each Agent/Administrator in FootPrints has a Personal Calendar. This is a place to add both personal appointments and work-related appointments. The Personal Calendar remains constant throughout all workspaces for a user.
- Availability—Each Agent/Administrator can have an availability schedule defined for them, minimizing conflicts when work appointments are scheduled. Availability can be linked to date/time fields in an issue.

Workspace Work Schedule

A work schedule can be defined for a Workspace and for individual Agents. Regular working hours, days off, and holidays can be defined in the work schedule by the Workspace Administrator. Escalation rules can be configured to follow the Calendar. Holidays and exceptions to the regular schedule are defined in the work schedule. When generating a time-tracking Report, work schedule time can be figured into the Report so that only time during work hours is calculated.

The FootPrints Workspace Work Schedule also allows the administrator to establish a second shift in the work schedule. This provides greater flexibility in work hours and reporting.

Synchronizing Appointments

The FootPrints Sync add-on module can synchronize appointments in the FootPrints calendar with external calendars and vice-versa. This means that, from within FootPrints, you can create an appointment on the FootPrints calendar and have that appointment show up on your external calendar (Outlook, Lotus Notes, etc.) You can also create an appointment in your external calendar and have it show up in your FootPrints calendar. This requires installation of a client.

Automated Workflow

Workflow Functions

"Workflow" refers to tasks and business rules that can be configured by the Workspace Administrator to occur automatically based on many different criteria. "Workflow" functions are the mechanisms that are built into FootPrints for configuring those tasks and business rules to occur automatically.

Escalation

FootPrints escalation enables you to automate business processes throughout the system with no programming, using the same web-based interface used for searches, reports, creating Issues, etc. This feature can perform simple escalations that send email when an Issue has been unresolved for a certain amount of time as well as observe more complex rules based on multiple criteria that enact multiple actions, such as changing status, assignment, etc.

Some of the common uses of the **FootPrints** escalation feature are:

- **Time-based escalation**—Escalate overdue Issues to another user or priority
- **Service Level Agreements**—Alert Agents to the fact that a service level agreement threshold is being reached.
- **Reminders**—Send follow-up reminders to Agents.
- **Automatic Assignment**—Create auto-assignment rules based on a combination of multiple criteria.
- **Custom Email Notifications**—Create custom email notifications to be sent to Agents and Customers at any stage in the workflow.
- **External Programs**—Launch a batch job in another system or application.
- **Multi-workspace workflow**—Automate the escalation of an Issue from one workspace to another.
- **Approvals**—Use in conjunction with statuses and roles to define a custom approval process.

An escalation rule automatically escalates Issues based on your criteria on a workspace-wide basis. Rules can be defined for which Issues should be automatically escalated and for defining what should occur when Issues meet those criteria. For example, your organization may have a rule that states that "all priority 1 Issues must be closed within 24 hours." **FootPrints'** automatic escalation feature can be configured to send an email automatically to alert the Administrator when a priority 1 Issue is still open after 24 hours.

Service Level Management

The Service Level Management feature is designed to help the service desk meet service levels for customers based on their service contracts. Service levels can be defined based on the problem or incident type using a Workspace field, or can be based on who the customer is using an Address Book field. Resolution time, response time (how quickly a response of some kind must be made to an Issue), contract information, and associated escalation rules can be defined for each level, and an unlimited number of service levels can be defined. Due dates and times are automatically generated based on the resolution time. Service Level Metric reports can be generated including percentage of issues that exceeded the resolution time for a particular time period. In sum, the Service Level Management feature can provide the basis for a series of automated workflow rules that ensure the standard of service provided to customers.

Numara FootPrints Change Management

In general, change management is a process developed to ensure that standardized methods and procedures are used for handling all changes. The goal of change management is to minimize the impact of changes on service quality.

The **FootPrints** Change Management add-on module enables organizations to develop their own approval process for Issues with no programming. In **FootPrints** Change Management, approvers are designated for specific workspaces. When an Issue meets approval criteria, the approvers are notified that an Issue awaits approval. The approvers then give or withhold approval. When an Issue meets approval criteria, it is moved to another stage in the process. Note that meeting "approval criteria" may mean that the Issue is rejected rather than approved.

Workspace administrators can designate different approvers for different stages in the approval process. For example, a proposal for a software change may require an approval in principle for the change from product management, then an approval for the design from the development organization, then an approval for the actual software build from software development, then a testing approval from quality assurance, and so on. The Change Management feature allows the Workspace administrator to create an orderly and efficient method for getting those approvals and ensuring that nothing falls through the cracks or waits too long for review.

NOTE

FootPrints Change Management is an add-on module that incurs an additional cost. This add-on module is not available for the FootPrints database version. Approvers must have a FootPrints Agent license (fixed or concurrent).

FootPrints Change Management provides features that include the following:

- Customizable criteria for automatically setting off an approval process (including all built-in and custom fields)
- Customizable rules for meeting an approval (i.e. requiring one, a majority, or all to approve)
- Customizable actions upon approval or disapproval, including the start of another approval phase, change of status, re-assignment, etc.
- Customizable email notifications for various stages of approval
- Change Management Audit Trail
- Customizable Permissions for access to approval information
- Built-in homepage listing "My Approvals"
- Built-in Change Management reports
- Approval via email
- Optional anonymous approvals

Numara FootPrints Service Catalog

Service Catalog is the heart of ITIL v3 and Numara FootPrints Service Catalog meets the requirements of ITIL v3. A Service Catalog is a document that provides a brief overview, in business terms, of all the business and infrastructure services offered by the IT provider, which may also include service charges. Numara FootPrints Service Catalog (SC) enables IT organizations to offer a menu of services customized to their business customers; this allows IT to demonstrate its value to the business, and provide transparency of service costs . Items in the Service Catalog could include new equipment (laptop, Blackberry, etc.), critical business services such as email, or a bundle of services as required for a new hire. An entry in the SC would include a description of service, costs, service level agreement, etc. in a customer-friendly interface.

The Numara Service Catalog builds on existing functionality in FootPrints (configuration management, workspaces, quick issue templates, self-service, and change management) to provider a complete SC solution. Because of its great flexibility, the Numara Service Catalog can be used in any type of organization or department – IT, HR, Pro Services/Training, Facilities, External Customer Support, etc.

Broadcast Message

A broadcast message is a message displayed in a pop-up window to all logged in **FootPrints** internal users (i.e., not customers). Only system administrators can create broadcast messages.

Customer Surveys

When this feature is enabled, a customer satisfaction survey can be automatically emailed to customers when their Issues are closed. The email, with the survey attached, is sent to the customer according to the rules specified under Administration | Workspace | Automated Workflow | Customer Surveys.

FootPrints Web Services

The FootPrints web services feature is a way for users to programmatically access the database over the Internet using web services and perform specific functions. The specific functions are:

The functionality is limited in that the programmatic interface to **FootPrints** cannot alter the database structure. For instance, the user (or program) could not remove a database column.

Numara FootPrints Sync

The Numara FootPrints Sync feature enables **Numara FootPrints** agents to:

- synchronize appointments made in **FootPrints** to their PIM (Personal Information Manager) and synchronize appointments made on their PIM to FootPrints
- make tasks in the PIM from **FootPrints** Issues that are assigned to them and update the status fields of Issues in **FootPrints** based on a field in the PIM
- synchronize their **FootPrints** Address Book to their PIM (i.e., write the contacts in the **FootPrints** Address Book to their PIM).

Numara FootPrints Sync requires installation of a client. Numara FootPrints Sync supports Microsoft Outlook, Lotus Notes, Palm Desktop/Hotsync, Pocket PC (through Outlook), Blackberry/RIM, and Outlook Express. This is an add-on module and must be purchased for use with **Numara FootPrints**.

NOTE

Synchronizing with Blackberry/RIM is a two-step process in which the user either synchronizes **Numara FootPrints** with Outlook on the desktop and then synchronizes Blackberry/RIM with Outlook or synchronizes Blackberry/RIM with Outlook and then synchronizes Outlook with **Numara FootPrints**.

Refer to *Numara FootPrints Sync* for details on installation and configuration of the client.

Chapter 3: The Numara FootPrints Interface

After successful login, the FootPrints Homepage is displayed. The FootPrints Homepage is the starting point of your FootPrints workspace. You can return to the home page at any time by clicking the "Home" button on the toolbar.

The FootPrints home page is displayed in two logical areas divided by the toolbar. **Above the toolbar**, from left to right, are:

- the **Numara logo**
- the **Quick Search** field, for searching for issues
- the **greeting**, which displays the user's name
- the **Sign-out** link, for logging off of FootPrints
- the **Preferences** link, for setting individual user preferences
- the **Help** link, for displaying the full online help documentation
- below the Sign-out, Preferences, and Help links, the **workspace drop-down** for changing the workspace.

Below the FootPrints toolbar are:

- the **dashboard components** for listing items of interest, and, below that
- the **Actions** drop-down for taking actions quickly
- the **Display** drop-downs for displaying issues that meet specified search criteria, and below that
- the list of issues

The **FootPrints toolbar** displays the following options:

- **Home** for displaying the home page
- **New Issue** for opening a new issue
- **Reports** for accessing reporting functions
- **Administration** (only visible to those with administrator privileges) for accessing administration functions
- **More** for additional functions

The New Homepage

Experienced FootPrints agents who have only recently upgraded to a 9.5 or newer release will notice immediately how radically different the homepage looks. All of the existing FootPrints features and functions are still there, but they have been streamlined and the page has become less complicated in order to make it easier for you to navigate. The goal was to make life easer for you, and once you become accustomed to the new interface, it will be. For new agents, the new look of FootPrints will make it easier to adjust to using the software.

Of special note, the term "Project" has been changed throughout FootPrints to "Workspace". Consequently, a cross-project report is now called a "cross-workspace report".

Where Things Went

The home page has been shifted around to emphasize buttons, links, and data that is most important and to mute other information. This results in the eye being drawn to what is most important and limits the clutter caused by superfluous information. Here's a quick description of where everything is now:

- FootPrints Toolbar—The toolbar is no longer a row of buttons down the left side of the page. It is now a band across the upper portion of the page, separating the top of the page from the FootPrints Dashboard components and all the material below the dashboard. By default, the toolbar does not have as many buttons visible, though the administrator can add more buttons to it. The Homepage, New Issue, Reports, and (for those with administrative privileges) Administration buttons are still there. If you click them, you get the main page for those functions. If you mouse over them, a menu is displayed for additional functions relevant to them. There is also a More button now. Mouse over the More button to display additional functions, as follows:
    - Address Book
    - Workspace Calendar
    - Personal Calendar
    - CMDB (if your organization used the Configuration Management Database module)
    - Knowledge Base
    - Instant Talk (optional)
    - Remote Control (optional)
- My Preferences—If you are looking for the My Preferences button, it is now a link at the top right of the page and is called simply "Preferences".
- Quick Issue Templates, Global Issues, and Adding to the Knowledge Base—Quick Issue Templates, Global Issue, and adding to the Knowledge Base are now on the menu under New Issue, and Quick Issues are called "Quick Templates".
- Reports—All Reports, including the Flashboards, are listed under Reports.
- Search—All of the Search functions are at the top of the page where the Quick Search was and remains located. The three radio button options for "Title", "Keyword", and "Number" searching have been replaced with a drop-down that defaults to "Title" searches and also includes a "Keyword" option. Typing a numeric value into the Quick

Search automatically pulls up the corresponding Issue with that number, so the "Number" option has been remove. To perform a string search on a numeric value, you must surround your numeric value with double quotes. Advanced Searches are performed by clicking the Advanced link. Hover over the Advanced link with the mouse for access to Saved Searches and Cross Workspace Searches.

- Calendar—The Calendars (Personal and Workspace) are under the menu for the More button. Visit either calendar or the Create/Edit Issue page for access to the Availability Calendar.
- Help—Help is now a link in the top right corner of the page. This is the button for the main help page. Context-sensitive help remains on all other pages.
- Logout—The log out function was in the FootPrints toolbar in the left frame. It is now called "Sign out" and is a link in the top right section of the page.
- Project drop-down field—The Project drop-down field, used to change projects, is now the "Workspace" drop-down. It is no longer in the upper right corner of the page, put on the upper right side. If you look there you will see the words "You are now in the X workspace", where X is the name of the current workspace. Click on the name of the workspace and the drop-down is displayed.
- List of Issues—The list of issues is in the same place that it was before.Some changes have been made to give you more access to the information you need without having the overhead of loading other pages. You will see the Priority, Title, and column that is sorted highlighted while other information is muted. Alongside the Title is the first few words of the most recent Description to easily see the latest information for your assignments. Clicking [more...] will reveal even more of the most recent Description and reveal links for "Descriptions", "Details", and "Edit". Click the "Descriptions" link to reveal the full list of all Descriptions if you need this level of detail. If more detail is needed, you can click the "Details" link to launch the full Details page. At any time during this process you can click the Title of the Issue to launch the new Quick Edit page to quickly update your Priority, Status, Description, or other selected fields without having to leave the page. If you need to edit more information, access to the full Edit page is available as a link once [more...] is clicked, is available from the Quick Edit, and is also available by clicking the Issue number on the homepage for 1 click access.

  The new Quick Edit feature means that, without leaving the homepage, you can quickly make an update to the Title, Priority, or Description, which are the most common updates that occur. If you work in an environment that requires consistent updating of other fields, your administrator can add other fields to this form. If you work in an environment that requires extensive updating of fields and use of other functions with each update like Time Tracking, the Quick Edit feature may not be for you and your administrator may disable it
- Quick Action Dialog—The Quick Action Dialog checkbox, which was located above the list of issues on the right side of the page is still above the list of issues, but it was moved to the left side of the page for greater visibility.
- Priority—Formerly, all priorities in the priority column of the list of issues were displayed. In the new interface, only important priorities are displayed so as to make them more visible.
- Multi-window mode—You may have noticed that the Incident Details and Edit pages are opening in a new window. In the past this was optional, but is now the standard approach in FootPrints. With the way the new homepage has been designed, you should have to visit these pages less often than before. The separate windows also let's you multitask more efficiently.

Above the Toolbar

Quick Search

The Quick Search is located at the top of a FootPrints page. It is available from any FootPrints screen (in the Address Book, the Quick Search searches the Address Book only).

To use Quick Search, enter the search string in the Quick Search field, select the field to search from the drop-down (using the drop-down arrow), and the click the SEARCH button. A list of all Issues that match your search criteria are displayed. More complex searches are covered in the chapter on Searching and Reporting.

Sign-out

The Sign-out is located at the top of a FootPrints page. Click the Sign-out link to log out of FootPrints.

Preferences

The Preferences option allows Agents, administrators, and customers (if they have been configured with access to preferences) to customize their Homepage and set other personal preferences. Users can change their email addresses, passwords, security options, Homepage list preferences, and more.

NOTE

Customers do not have access to all of the preferences available to Agents and administrators.

To change preferences, click the Preferences link.

Tabs are displayed for:

- Personal Info—Change your display name, email address, default Workspace, password, and more.
- Issue Page—Options for creating and editing Issues.
- Homepage—Define the list of Issues and columns displayed on your FootPrints homepage.
- Dashboard—Define the dashboard components that appear at the top of the main frame on your FootPrints homepage.
- Misc. Preferences—Other personal preferences.

NOTE

Most options apply to FootPrints system-wide, with the exception of Homepage and the security option to Require Password for Issues, which are chosen on a per-Workspace basis. If a user belongs to multiple Workspaces, it is possible to display different list preferences for each Workspace.

Personal Info

These options apply to all Workspaces to which you belong. After configuring options, scroll to the bottom of the page, enter your password, and click SAVE.

- Name—Change your display name (does not affect user ID). Replace the current name in the text box.
- Primary Email address—Change your email address for FootPrints email notification. To change your email address, replace the current address in the text box. The option must be checked to receive email.
- Pager Email Address (optional)—Optionally enter separate email address for notification via pager. Can be used for escalation notification. Check this option to receive regular notification email at this address.
- Wireless Email Address (optional)—Optionally enter separate email address for notification via wireless device. Can be used for escalation notification. Check this option to receive regular notification email at this address.
- Change Password—Change your FootPrints password. Password must be entered twice.
- Default Workspace—If you are a member of more than one Workspace, change the default Workspace that is displayed when logging in to FootPrints. To change the default Workspace, choose from the drop-down box.
- Your Local Time Zone—By default, FootPrints displays all dates and times in the time zone where the FootPrints server resides. If you select a time zone from the drop-down list, all dates and times are displayed adjusted to be accurate for that time zone (does not affect how data is stored).
- Date Format—This option determines how dates are represented throughout FootPrints. The options are:
    - American—MM/DD/YYYY
    - European—DD/MM/YYYY
    - ISO—YYYY/MM/DD
    - Revert to the system default—The default format set by the System Administrator is used.
- Preferred Language—If the current FootPrints installation supports multiple languages, choose a language for display.
- U.S. Government Section 508 Compliance/Visually Impaired Enhancement—This feature enables FootPrints to be better accessed by visually impaired users. If enabled, FootPrints is optimized to be used with the "JAWS" browser and other similar browsers. If you enable or disable this feature, you must refresh the browser.

NOTE

This feature should only be enabled if you are visually impaired and using a browser like JAWS.

- Delete Cookie—If you elected to have FootPrints remember your ID and password (on the Login page), an option to delete the login cookie appears here. Check the box to delete the cookie. Deleting the cookie means that you must enter your user name and password every time you log in to FootPrints.

NOTE

If you just changed your password, your old password is still active until after you apply the changes. Consequently, even though you changed your password on the Preferences page, you must enter the old password to apply the changes. After successfully changing your preferences, your new password becomes active.

Issue Page

These options apply to all Workspaces to which you belong. After configuring options, scroll to the bottom of the page, enter your password, and click SAVE .

- Interface Style—Choose between Tabs and Expand/Collapse
  - Tabs—Selecting Tabs causes sections to be displayed as tabs on Create, Edit, and Details Issue pages. If you select Tabs, you can select which section tab is displayed when each of the three page types (Create Issue, Edit Issue, and Details) is displayed. Choose the tab to display from the drop-down box.
  - Expand/Collapse—Selecting Expand/Collapse causes sections to be displayed as expandable/collapsible sections on Create and Edit Issue pages. Agents can click the plus or minus sign beside the section heading to expand or collapse the section, respectively. If you select Expand/Collapse, you can select which sections are displayed in the expanded mode for each of the three page types (Create Issue, Edit Issue, and Details). Checking the box beside the section name means the section is expanded when you access the selected page.
- Automatic Spell Check—Optionally enable automatic spell check on the Create Issue and Edit Issue pages. The spell check occurs after you submit an Issue or an update to an Issue.
- HTML Description Editor—The Description field can include controls for formatting the text, including font type, size, color, bulleted and numbered lists, and tables. Internet Explorer v5.5 or greater is required for this feature to work. If disabled, a plain text box is used instead.

NOTE

The HTML Description Editor feature may be disabled by the administrator in some Workspaces.

- Flip-Thru Description Viewer—If enabled, when the user views the Issue Description field, only one description is displayed at a time. Arrow buttons allow the user to "flip through" multiple descriptions for the Issue. An additional control above the Description field allows the user to display all of the descriptions at once in a new window.
- Display Complete Description on Edit—If enabled, a display field that cannot be edited is included just before the Description field that allows the Agent to scroll through previously entered descriptions without opening a separate View Current Description window.
- Edit Most Recent Description—If enabled, the last description of an Issue appears on the edit page in a separate box for editing purposes. This option is only available to administrators or other users with the correct role permission.
- Prefill New Issues With My Contact Information—If enabled, the Contact Information section of the Issue is always pre–populated with the Address Book record of the Agent entering Issue data. The Agent must have a corresponding record in the Address Book for this to work. Otherwise, the fields remain empty.
- Open attachments from a new window—If enabled, a new window is opened when you click on a file attachment to download it. The default is "Disable".
- Behavior after issue create/edit—The three options in this drop-down are: Close window and/or refresh homepage, Display issue details, and Display confirmation page only. Close window and/or refresh homepage closes the Issue page window . Display issue details displays the Issue details page in a new window. Display confirmation page only displays a View Issue button and a Close Window button. Clicking the View Issue button displays the Issue details page. On a heavily used system (one with many agents and Issues) the Display confirmation page only option provides the best performance, while the other two options are about equal in terms of their affect on system performance.

- Quick Descriptions/Signatures—If you select the link, a window is displayed that allows you to create pre-defined text with which to populate the Description field in the Create Issue and Edit Issue pages. This can be used to create a personal signature, or to have common answers readily available. To use a quick description when completing a Create Issue or Edit Issue page, select the name of the quick description from a drop-down list located in the Description field title bar. Additional information for creating, editing, and deleting quick descriptions is below.
- Require Password for Issues—Require a password to save changes to an Issue. This is enabled on a per-workspace basis, i.e., to enable this in another workspace, change workspaces, then return to the Preferences page and enable it.

Create a Quick Description/Signature

To create a quick description:

1. Select Preferences and then click the Quick Description/Signatures link in the Issues tab on the Preferences page. A pop-up is displayed.
2. Enter a name for the quick description/signature in the Create section, then enter your password and click GO. A multi-character field is displayed.
3. Enter the content for the quick description/signature into the multi-character field and click GO.
4. The description is saved and the Quick Description pop-up is displayed to allow you to create, edit, or delete additional quick descriptions/signatures.

Once a quick description or signature has been created, a drop-down box appears on the Create Issue and Edit Issue pages in the Description field title bar. The drop-down box contains the name(s) of the quick description(s) in the Workspace. If the Agent selects a name from the drop-down, the Description field is populated with the pre-defined text. The Agent can still enter additional text in the Description field.

Edit a Quick Description/Signature

To edit a quick description:

1. Select Preferences and then click the Quick Description/Signatures link in the Issues section on the Preferences page. A Quick Descriptions pop-up is displayed.
2. Click on the name of the quick description or signature in the Edit section, then enter your password and click GO. A multi-character field is displayed.
3. Make the changes you want to the text in the multi-character field. You can delete, add, or alter text as you see fit. When you are done making changes, click GO.
4. The content is saved and the Quick Description pop-up is displayed to allow you to create, edit, or delete additional quick descriptions/signatures.

Deleting a Quick Description/Signature

To delete a quick description/signature, which removes the quick description or signature from the drop-down box on the Create Issue and Edit Issue pages:

1. Select Preferences and then click the Quick Description/Signatures link in the Issues section on the Preferences page. A Quick Descriptions pop-up is displayed.
2. Click on the name of the quick description/signature in the Edit section, click the Check this box to delete the selected Quick Description/Signature checkbox, then enter your password and click GO.
3. The quick description/signature is deleted and the Quick Description/Signature pop-up is displayed to allow you to create, edit, or delete additional quick descriptions or signatures.

Homepage

This tab is used to define the list of Issues displayed on the FootPrints home page. By default, My Assignments is chosen. The My Assignments selection lists your most recent open assignments and is the recommended choice for most users. It is the fastest to display and allows you to be continuously updated on your assignments. However, the user can choose instead to display any built-in or custom list.

NOTE

The options chosen below are, in effect, on a per-Workspace basis. To change your preferences in another Workspace, change to that Workspace and re-configure the List Preferences.

The options are:

- Lists Available on Homepage—The lists that are displayed in the drop-down in the main window of the Homepage. One or more lists can be highlighted by holding down the CTRL key while clicking on the list. The choices are:
  - My Assignments—The most recent active Issues assigned to you. Shown by default.
  - My Assignments and Requests—Active Issues assigned to you and unassigned Requests from customers.
  - My Team's Assignments—Active Issues for your Team (only displayed if you belong to a Team).
  - My Assignments in All Workspaces—Active Issues assigned to you in all Workspaces (only displayed if you belong to multiple Workspaces).
  - My Active Approvals—Lists all Issues for which the Agent is an approver, the Agent may or may not have yet voted, and voting has not been completed. (Applies to Change Management approvers only.)
  - My Active Approvals and Assignments—Lists all Issues for which the Agent is an approver, the Agent may or may not have yet voted, and voting has not been completed, as well as the Agent’s assignments in the current workspace. (Applies to Change Management approvers only.)
  - My Vote Required—Lists all Issues for which the Agent is an approver, the Agent has not yet voted, and voting has not been completed. (Applies to Change Management approvers only.)
  - My Vote Required and Assignments— Lists all Issues for which the Agent is an approver, the Agent has not yet voted, and voting has not been completed, as well as the Agent’s assignments in the current workspace. (Applies to Change Management approvers only.)
  - All Issues—All Issues in the Workspace database (only available if you have rights to see all Issues in the Workspace).
  - Global Issues—All active Global Issues for the Workspace.
  - Deleted Issues—Deleted Issues (administrators only).
  - Requests—Requests submitted by customers (see below).
  - Saved Searches—Displays personal and shared custom searches.
  - Knowledge Base—Displays Solutions from the Knowledge Base.
- Default List—The default list of issues generated automatically on the FootPrints Homepage when logging into FootPrints is specified here. Choose from one of the items selected in the Lists Available on Homepage.

NOTE

Whichever list you choose as the default, you can always view a different list by choosing another option from the Display drop-down box on the Homepage.

- Homepage Auto-Refresh Interval—Normally, the default Homepage list refreshes each time you click Workspace Home or perform any action that brings you back to the Homepage. Optionally, you can set your preferences to automatically refresh the Homepage list at intervals of 15, 30, or 60 minutes. If you configure FootPrints to refresh every 30 minutes and then go to lunch, when you come back the list is refreshed, with no user intervention required.
- Maximum Issues per Screen—The maximum number of Issues that display at one time on the Homepage.
- Default Sorting—Sort list by a designated field (including Workspace and Address Book fields) and choose a field for secondary sorting (where there is a match in the primary sorting column, the secondary sorting column determines the order in which the Issues are displayed). Choose descending (from lowest to highest) or ascending (highest to lowest) order.
- Homepage columns—Choose which columns to display and in what order. For example, to display the Issue Type field:
  - For Type of Field, choose FootPrints fields.
  - Highlight Issue Type under Available Fields.
  - Click Add Field. Issue Type is displayed in the Displayed Fields box.
  - To change the order of fields to be displayed, highlight a field in the Displayed Fields box and click the up or down arrow to move it.
  - To delete a field, highlight the field in the Displayed Fields box and click Delete.

NOTE

Certain columns are displayed automatically on the Homepage, including Issue number and the Quick Action Checkbox dialog. Title is also mandatory, but the placement can be selected in the Fields Displayed dialog box. In addition, by default, My Vote Required is displayed in the Homepage List for those who are designated as approvers to the Change Management feature. The My Vote Required listing cannot be removed from the list.

Dashboard

FootPrints dashboard components containing lists of specific information. By default, Workspace Totals and Global Issues are displayed. Dashboard components can be displayed in as many as four columns. Users can also make custom components for display on the homepage. The Workspace Totals component displays the number of Issues the workspace contains in different categories. The Global Issues component displays the Title fields of active Global Issues, which are also links to those issues. Buttons that are displayed to the upper right of the components on the homepage allow you to:

- collapse the component (-)
- expand the component (+)
- remove the component (X)

The Dashboard tab of the Preferences page is where you specify which dashboard components are displayed on your homepage in the Workspace. Users can specify different sets of dashboard components for each of their Workspaces. By default, Workspace Totals and Global Issues are displayed. Dashboard components can be displayed in as many as four columns. Users can also make custom components for display on the homepage.

The components that can be added to the dashboard for display on the FootPrints homepage are:

- Chart—When you select this component, you then select which chart to display from a drop-down field. Options are Received vs Closed ands Active Issues. If you select Received vs Closed you must select the time period for which FootPrints will account and whether to display your Issues only or the entire Workspace's Issues. The component then displays the Issues that were received and the Issues that were closed during the designated period for the designated agent(s).
- Currently Logged In Users—Lists the number and IDs of users logged into the current workspace. When specifying this component, you will be asked to set the number of records to display on the first page of the list.
- Custom Defined—Enter custom code to display anything you want in the dashboard component. This can be HTML, javascript, etc.
- Global Issues—Lists the Global Issues. Links in the Global Issues component can be clicked to access the Issue and create a linked Issue. When specifying this component, you will be asked to set the number of records to display on the first page of the list.
- Most Recent Solutions—Displays the most recent solutions in the Knowledge Base. You must designate how much of the solution Title field is displayed.
- My Assignments—Lists the Issue number and Title of the user's active assigned Issues. The list entries are linked to the Issues. Clicking on a list entry displays the Issue. When specifying this component, you will be asked to set the number of records to display on the first page of the list.
- Pending Approvals (if you are a Change Management approver)—Lists Change Management Issues for which you are an approver and which still require a vote. When specifying this component, you will be asked to set the number of records to display on the first page of the list.
- Pending KB Approvals (if you are a Knowledge Base approver)—Lists submitted Knowledge Base solutions for which you are an approver and have not yet been approved. When specifying this component, you will be asked to set the number of records to display on the first page of the list.
- RSS Feed—Lists entries from your selected RSS feed. When specifying this component, you will be asked to set the number of records to display on the first page of the list and the URL for the RSS feed.
- Requests—Lists customer requests.
- Saved Search—Lists saved searches.
- Today's Appointments—Lists your appointments for the day.
- Workspace Totals—Lists the number of Issues broken down by status. Click on the status to display the Issues in the main frame.

Add a FootPrints Dashboard Component

To add a dashboard component to your homepage:

1. In the Available Components field, click the dashboard component to be displayed. Only one component can be selected at a time. Fields are displayed for any additional settings you need to enter.
2. Enter any additional settings.
3. Click the Add Component button. The dashboard component is displayed as an icon in the Current Dashboard area. Mouse over displayed dashboard components to see what is included in the current dashboard.

4. Enter your password in the Apply Changes field at the bottom of the page and click SAVE. If you skip this step, the changes are not made.

Edit a FootPrints Dashboard Component

1. In the Current Dashboard area, click the dashboard component to be edited. Only one component can be selected at a time. The following buttons are displayed:
   - Complete Edit
   - Delete Component
   - Cancel Edit
2. Change settings as needed.
3. Click the Complete Edit button to save the edits or click the Cancel Edit button to leave the dashboard component settings unchanged.
4. Enter your password in the Apply Changes field at the bottom of the page and click SAVE. If you skip this step, the changes are not made.

Delete a FootPrints Dashboard Component

To delete a dashboard component from your homepage, from the Preferences page:

1. In the Current Dashboard area, click the dashboard component to be deleted. Only one component can be selected at a time. The following buttons are displayed:
   - Complete Edit
   - Delete Component
   - Cancel Edit
2. Click the Delete Component button.
3. Enter your password in the Apply Changes field at the bottom of the page and click SAVE. If you skip this step, the changes are not made.

You can delete all of the dashboard components at once by clicking the Delete All button next to the Current Dashboard area. The deletion is not saved until you enter your password in the Apply Changes field at the bottom of page and click the GO button. Finally, you can delete the dashboard component directly from your homepage by clicking the X in the upper right corner of the displayed component. However, if you delete the component using the X, it will be redisplayed the next time you log into FootPrints.

Moving FootPrints Dashboard Components on the Homepage

Dashboard components can be moved around the homepage using drag-and-drop.

Miscellaneous Preferences

The options below are configured for the entire system. After configuring options, enter your password and click GO.

- Sync Settings—Displays a pop-up window for configuring the two-way calendar synchronization feature. Refer to FootPrints Sync for complete details on using the FootPrints two-way synchronization with external calendars feature.
- Error Alerts (administrators only)—Option to receive a pop-up window when system errors occur. The log is still viewable by selecting Administration | System | Logs, regardless of which option selected here.

- Instant Talk Preferences—Choose whether to allow customers to initiate an Instant Talk session with you. If you choose to not allow them to initiate Instant Talk sessions with you, you'll still be able to initiate Instant Talk sessions with them and with other Agents.

NOTE

This option only applies if Instant Talk is enabled.

- "Checkback" Method—Select whether or not to use the Java applet method for checkback. This function runs regularly to check to see if you are available for chats and to check for free concurrent licenses. The default is No Java applet and is recommended for most users. Select the correct method to minimize problems with losing mouse focus while working within FootPrints, or FootPrints "stealing" focus from other active windows on your desktop:
  - Java applet—Recommended for users with older versions of Internet Explorer, and for users with Microsoft Java (often found on Windows 98/2000).
  - JavaScript—Recommended for users with Sun Java on their desktop (often installed on Windows XP/2003 desktops) and with newer versions of Internet Explorer v6. If you encounter problems with page focus when using this checkback method, try using the next selection, JavaScript/HTTP, to solve the problem. "Problems with page focus" refers to a situation where, when checkback causes a page reload, the FootPrints window reacquires the main focus when you are working in some other application. This is a rare problem.
  - JavaScript/HTTP—Should you encounter problems with page focus, as described in the preceding paragraph, use this checkback method. Recommended for users with Sun Java on their desktop (often installed on Windows XP/2003 desktops) and with newer versions of Internet Explorer v6.
- Authentication—This selection is only displayed when the Numara Asset Management Platform is enabled for the system. This selection is used to enter credentials for authenticating the user to the NAMP. Select the Edit button to enter your NAMP user name and password. Select the Clear button to clear the user name and password fields entirely (leaving no credentials for authentication). These values must match your NAMP (not FootPrints) login. If "guest credentials" are defined for agents and an agent has credentials defined in Preferences, only the credentials in Preferences are applied. If authentication through these credentials fails, the system does not apply the guest credentials as an alternative.
- Java Installation—This selection is only displayed when NAMP is enabled for the system. Integration with NAMP requires a local installation of the Java runtime. Typically this is done automatically upon first use of an integrated NAMP feature. If your Java installation should become corrupt or put of date, you can manually correct it by selecting the **Update My Java Installation** button provided here. Contact your NAMP administrator if you need additional clarification.

The Numara FootPrints Toolbar

The FootPrints toolbar has options for:

- Home—Displays the FootPrints home page.
- New Issue—Click to display a New Issue page. Mouse over the button to display other options, as follows:
  - New Global—Create a new global issue.
  - Add to KB—Add an existing issue to the Knowledge Base.

    - Quick Issues—Select a Quick Issue from the list of Quick Issues.
- Reports
    - My Reports—Displays a page for running, editing, or deleting saved custom or metric reports.
    - New Report—Create a detailed report from the database.
    - Metrics—Report on statistical and historical data.
    - Cross Workspace—Report on data from multiple FootPrints workspaces.
    - Time Tracking—Create/view time tracking report.
    - Change Management—Create/view change management report.
    - Workspace Flashboard—The Workspace Flashboard is only available to Workspace and System Administrators and reflects activity for the current Workspace.
    - Personal Flashboard— The Personal Flashboard is available to any Agent and reflects the individual's activity and the activity of Teams to which the Agent belongs for the current Workspace.
- Administration (Administrators only)—A complete list of options can be found in the chapters on Administration in the FootPrints Reference Manual.
- More
    - Tools
        - Address Book—Display this workspace's Address Book (opens in separate window).
        - Workspace Calendar—View appointments and jobs for the whole workspace.
        - Personal Calendar—View your own appointments and jobs.
        - CMDB—View the Configuration Management Database (with appropriate permissions). The CMDB is an add-on module that is purchased separately for FootPrints.
        - Search Assets (optional)—If this option is enabled, access the Asset Management database.
    - Support
        - Knowledge Base—Use this link to browse the Knowledge Base or, with appropriate permissions, create a new Solution to a common problem for the Knowledge Base or (for administrators only) create and edit Frequently Asked Question categories.
        - Instant Talk™—Chat online one-on-one with another user.
        - Numara Remote— Numara Remote is an add-on module that allows you to control a user's desktop remotely for troubleshooting purposes.

The options on the Toolbar may differ, depending on your role. In addition, up to three custom buttons may be configured on the FootPrints toolbar. If you see more buttons on the main toolbar, your administrator may have configured them.

Below the Toolbar

Resorting the Homepage

The list displayed on the homepage can be resorted by column. Note that most column headings on the homepage, or any search results page, are hypertext links. The current column being sorted on is designated by a down arrow. To re-sort the list:

Hover the cursor over the column heading. A down arrow is displayed to the right of the column name.

1. Click the down arrow to the right of the column name. A menu is displayed.
2. Click on Sort Ascending or Sort Descending in the menu to sort the column in ascending (from lowest to highest) or descending (highest to lowest) order.

NOTE

The homepage cannot be sorted by the assignee or title fields. All other fields, including custom fields, can be sorted. To view Issue data that is sorted by assignee, please use the reports feature.

Filtering Columns

Some columns can be filtered to display only the issues that meet the specified filter criteria. For example, the agent can filter the list of issues on the homepage according to the Status field, requesting that only issues with a status of Open or Testing be displayed.

Column Types That Can Be Filtered

The following column types can be filtered:

- Single-line character, web site and FTP file/site, email address fields—Columns populated by strings (text) can be filtered by entering a string. Issues containing the string are displayed in the column.
- Drop-down and multi-select fields—Columns populated by drop-down and multi-select field data can be filtered by selecting field options as criteria. The agent selects from a list of available choices (the choices available in the field are displayed as checkboxes and the agent selects the criteria for filtering by clicking on the checkboxes). There is also an entry for "No data". When the filter is applied, only the issues containing the selected checkbox items in that field are displayed. If "No data" is selected, only issues that contain no data in the field are displayed. Agents can select one, more than one, or all checkboxes as filter criteria. Some additional considerations are:
    - For cross workspace searches, all of the possible entries from all workspaces for the field are displayed.
    - For multi-select fields, if any of the fields being filtered on were selected on a ticket, that ticket will show up on the query results.
    - For Submitted By fields, only agents are displayed, but customers. For example, if the filter criteria were "Smith", only issues with the name "Smith" are displayed, and only if "Smith" is an agent.
- Checkbox fields—Columns populated by checkboxes can be filtered based on two choices. The default options are On and Off, but the filter displays the names given the checkboxes (for example, they may have been named "True" and "False"). Issues where neither was selected are included in the results for Off. The column can be filtered for one or the other option, but not for both.

- Number fields—Filtering on number fields applies to Integer and Real Number field types. The column can be filtered for greater than (>), less than (<), or equals (=).
- Date/Date Time fields—The column can be filtered for dates/date times before, on, or after a specified date/ date time. In other words, the agent can specify a date/date time and display all issues with an earlier date/date time in the field (before), the same date/date time (on), or a later date/date time (after).
- Assignees field—Filtering is similar to filtering for a multi-select field. The list of available options for the Assignees is the same as the list in the "Advanced Search" |"Assigned To" list box plus an extra option for "Not Assigned. The agent can select one or more agents/teams from the list. Some additional rules are:If the agent picks more than one agent/team from the list, the results include issues that have any of those assignees assigned to it.If the option to filter by is a team, the result include only issues that have that team directly listed in its Assignees list box.If the option to filter by is a member, the result include all issues that have that member directly listed in its Assignees list box no matter which team the member belongs to.When selecting to filter by "Not Assigned", the result include all issues not assigned to anybody.

Column Types That Cannot Be Filtered

The following column types cannot be filtered:

- Multi-line Character fields
- Issue Type
- Closed by
- Last Updated (Time Since)
- Popularity
- Time of Last Edit
- Time Submitted
- Composite Title

Filtering Search Results

Filtering can also be applied to search results. For example, if the current search displays only open tickets on the homepage and the agent sets up a filter to show only high priority issues, the ultimate result shall list open tickets of high priority. If the filter criterion contradicts the search criteria, the filter shall still be applied. In these cases the search could result in no matches. For example, if the search is displaying open tickets and the filter is set to display only closed tickets, the result is no matches. If the agent performs a new search, the filtering is cleared.

Filter results cannot be cleared without leaving the homepage. If the agent clicks on the Refresh button, both search and filter results are refreshed, but both the search and filter are still in effect.

Filtering is not persistent. When a different search is run or the agent logs out of FootPrints, the filtering is cleared.

Filtering Multiple Columns

To include multiple columns when filtering, apply them one at a time or save them all at once by setting the filter criteria on each column and then clicking Apply Filter on the last one set. All filter settings are pending until Apply Filter is clicked from a filter menu.

To Filter a Column

To filter a column:

Hover the cursor over the column heading. A down arrow is displayed to the right of the column name.

Click the down arrow to the right of the column name. A menu is displayed.

Click Filter.

Enter the filtering criteria. This may require entering a string, clicking a checkbox or checkboxes, entering a date, etc. Refer to the section of this document titled Column Types That Can Be Filtered (above) for details. Long lists of options can be scrolled up and down.

Click Apply Filter. The column is filtered according to the criteria you specified and only the issues matching the criteria are displayed.

NOTE

The homepage cannot be filtered by the title field.

The Filter Icon

After a filter has been applied, a filter icon () is displayed in the bar above the issue list. Hover the mouse over the icon to display a description of applied filters or to select the Clear Filter option.

Clearing Filters

To clear a filter, either:

- hover the mouse over the Filter icon and then click the Clear Filter option (this clears all filters at once) or
- clear or unselect the filter criteria for each filter individually from each filter menu. This is useful for clearing the values from only some filtered columns.

Persistence

Filtering is not persistent. If the browser window is refreshed, another search is run, or a different page is displayed, the filtering is removed if the original page is displayed again.

Removed Column

If a column is removed from the page, the page is refreshed and the order of the issues in the columns is restored to the default, non-filtered order.

Reordering Columns

You can change the order of columns by dragging and dropping the column heading to the right or left. Column reordering persists if an agent logs off and back on or takes some other action. Reordering is reflected in the Preferences page.

Resizing Columns

You can use the mouse to resize columns. To do so, hover the cursor over the line that separates column headings. When the resize symbol is displayed, hold down the left mouse button and drag the resize symbol to the right or left to change the column size. Resizing a column causes the other columns to be resized proportionally, i.e., the increase or decrease is divided among the other columns equally. For performance reasons, multi-line character fields will not instantly redisplay the homepage list with the resized column. The column resizing will take effect on the next refresh of the homepage. Column resizing persists if an agent logs off and back on or takes some other action.

Resizing Restrictions

The following restrictions apply to resizing columns:

- The Status and Priority columns can be sized to no less than 50 pixels wide unless another field is added.
- The Title column can be sized to no less than 250 pixels wide.
- Other columns can be sized down to fit just the first letter of the field name plus "..." (where "..." indicates that the full field name is not displayed) plus the sorting icon.

Display Drop-Down

Above the home page list is the display drop-down box. This list contains built-in and custom queues and searches. Agents can customize this list via the **Preferences** link on the **FootPrints** . By selecting an option, the homepage list changes to the queue selected automatically. To refresh the current list, click **Refresh**.

The Display drop-down choices include (some of the choices are only displayed if you are an administrator, a member of a team, a member of multiple workspaces, a Change Management approver, etc.):

- **My Assignments**—The most recent active Issues assigned to you. Shown by default.
- **My Assignments in All Workspaces**—Active Issues assigned to you in all workspaces (only displayed if you belong to multiple workspaces).
- **My Assignments and Requests**—Active Issues assigned to you and unassigned requests from Customers.
- **Team Assignments**—Active Issues for your Team (only displayed if you belong to a Team).
- **My Active Approvals**—Lists all Issues for which the Agent is an approver, the Agent may or may not have yet voted, and voting has not been completed. (Applies to Change Management approvers only.)
- **My Active Approvals and Assignments**—Lists all Issues for which the Agent is an approver, the Agent may or may not have yet voted, and voting has not been completed, as well as the Agent's assignments in the current workspace. (Applies to Change Management approvers only.)
- **My Vote Required—Displays Change Management Issues on which the Agent's vote is required.**
- **My Vote Required and Assignments**—Displays Change Management Issues on which the Agent's vote is required as well as Issues to which the Agent is assigned.
- **All Issues**—All Issues in the workspace database (only available if you have rights to see all Issues in the workspace).
- **Global Issues**—All active Global Issues for the workspace.
- **Deleted Issues**—Deleted Issues (Administrators only).
- **Requests**—Requests submitted by Customers (see below).
- **Saved Searches**—Displays the Issues for Personal and Shared custom searches.

- Knowledge Base—Displays Solutions from the Knowledge Base. Select Internal Solutions (available to agents only), Solutions (available to agents and customers), or Solutions in All workspaces, which are solutions available to agents and customers in all Workspaces.

For example, if you choose "Requests", a list of all Customer Requests is displayed. To return to the original view, click "Workspace Home" on the FootPrints Toolbar, or choose "My Assignments" as your view. Both of these have the same effect: They return you to your original Home page.

If the current list has many Issues, Next and Previous buttons appear in the top right hand corner of the frame. Use these to page through the complete list.

Viewing Issues

To view the details of an Issue, click the word "more" in the Subject column of the issue, then click "Full Details". In the same way, you can click "Descriptions" to view only the Descriptions for that Issue, or click "Edit" to view the full Edit page of the Issue.

The Details, Create Issue, and Edit Issue pages can be displayed with expandable/collapsible sections or tabs. The type of display is specified by the user from the Preferences page.

The Details page gives you all of the information on an Issue, including Submit Date, Priority, Status, Description, Contact Information, Issue Information, Assignees, etc. If you don't see all data, use the scroll bar to display the full Issue.

There are also buttons that allow you to work with this Issue. They are:

- Edit—Update the Issue (only available if you have Edit permissions to this Issue).
- Details—Display details of Issue (default).
- Link—Create a static or dynamic link between Issues.
- Take—Take the Issue (only available if you have Taking permissions).
- Copy/Move—This icon will open a second toolbar with options to copy the Issue within the current workspace, or copy or move the Issue to another workspace
- Subtask—This icon will open a second toolbar with options to create a subtask of the Issue, or make this issue a subtask of an existing issue.
- New Global Link—Turn the Issue into a Global Issue or GlobalLink.
- Delete—Delete the Issue from the workspace (only available if you have Delete permissions for the Issue).
- Report—Display a report of this Issue (opens in separate window for printing).
- Add to KB—Create a Solution for the Knowledge Base with the details from this Issue (won't affect original Issue).

These options are discussed in more detail in Working with Issues and subsequent sections.

Quick Action Checkbox Dialog

The Quick Action checkbox dialog, available on the FootPrints Homepage, allows users to perform an action on one or more Issues. This provides a quick means to update or report on an Issue or to make a change that affects many Issues simultaneously. Some of the functions are only available to administrators, while others are available to Agents and administrators.

To perform a Quick Action on Issues from the Homepage:

1. In the main frame, check the box for each of the Issues you wish to change, or check the All box at the top of the column to select all of the Issues displayed on the current page.
2. Select the action from the drop-down list.

3. Click .
4. Different options are available depending on the action selected. See below for more details.

The Following Options are Available to All Internal Users

- **Report**—Display the details of the Issues in a separate window. If custom templates have been created, a drop-down is displayed that lists the available templates (Work Order, RMA, etc.) The Summary report displays all Issues in one window. Custom templates display each Issue in a separate window for printing purposes.
- **Close**—Close the Issues selected. Only Issues to which you have close rights are Closed. When Close is selected:
    1. A special Close Issues page is displayed.
    2. You can enter final notes in the Description box. They are appended to all Issues selected.
    3. Check the boxes to send email to the Assignees, Customer Contacts, and CCs for the selected Issues.
    4. Click **GO**. The Issues are closed and updated and emails are sent.

The Following Options are Available Only to Administrators

- **Delete**—Delete all Issues selected. A confirmation message appears. Click OK to proceed.
- **Status**—Change the status of the Issues selected.
- **Priority**—Change the priority of the Issues selected.
- **Assign**—Re-assign the Issues selected.

When Status, Priority, or Assign is selected:

1. A special Change Issues page is displayed.
2. Select the new priority, status, or assignees for the Issues.
3. If re-assigning an Issue, you can unassign the current assignees of the Issues selected by checking the Remove Previous Assignees checkbox.
4. You can optionally enter notes in the Description box. The notes are appended to all Issues selected.
5. Check the boxes to send email to the Assignees, Customer Contacts, and CCs for the selected Issues.
6. Click **GO**. The Issues are updated and emails are sent.

The Following Option is Only Available If You Have "Taking" Rights

- **Taking**—Take the Issues and assign them to yourself.

When Taking is selected:

1. A special Take Issues page is displayed.
2. You can unassign the current assignees of the Issues selected by checking the Remove Previous Assignees checkbox.
3. You can optionally enter notes in the Description box. The notes are appended to all selected Issues.
4. Check the boxes to send email to the Assignees, Customer Contacts, and CCs for the Issues selected.

5. Click **GO**. You are now assigned to the selected Issues.

The Address Book Homepage

If you selected Address Book from the FootPrints toolbar, the Address Book Homepage is spawned in its own window. The Address Book homepage is the starting point of your Address Book activities.

The Address Book homepage displays the alphabet across the top of the page a summary list of your contacts. For administrators only, Quick Action checkboxes are located down the right side of the main frame. The Quick Action checkboxes allow an administrator to quickly delete one or more contacts from the list.

The Address Book Alphabet Index

Click an alphabet character to display contacts whose last name begins with that character.

The Address Book Summary List of Contacts

The main frame displays a list of the contacts associated with your workspace. The listing includes the contacts' first and last names, email addresses, and user IDs.

In addition to displaying information about each contact, you can view, edit, or perform tasks on each of the contacts listed. You can also create an Issue from a contact's detailed view.

- To view a contact, click the contact's last name link. The Detail View page is displayed, showing the contact's complete contact record.
- To edit a contact, click the contact's last name link and, when the Detail View page is displayed, click the Edit Contact icon above the details.

The Address Book Quick Search

The top of the page contains a quick search facility for searching the Address Book for a contact. To use Quick Search:

1. Choose a search field with the down arrow, which displays a drop-down box.
2. Enter characters in the text box. The search engine will search for those characters in the field you specified in the first step and display all records that contain them in that field.

Address Book Toolbar

The Address Book Toolbar in the left frame of your home page has links to all of your Address Book tasks. It remains on the left of every page of the Address Book interface.

The options in the Toolbar are:

- **Address Home**—Go to your Address Book Homepage.
- **Create Contact**—Create a new contact in the Address Book.

- Contact Search—Perform detailed search of the Address Book based on our choice of first or last name.
- Report—Displays a brief reporting page in the main frame.
- Administration (administrators only)—Displays the Address Book Administration page in the main frame. A complete discussion of Address Book administration can be found in Address Book Administration.
- Help—Access online help for FootPrints.
- Close—Close the Address Book interface.

The options on the Toolbar will be slightly different depending on your user level. This manual discusses all of the Toolbar options.

The Address Book Main Frame

The main frame displays a list of the contacts associated with your workspace. The listing includes the contacts' first and last names, email addresses, and user IDs.

In addition to displaying information about each contact, you can view, edit, or perform tasks on each of the contacts listed. You can also create an Issue from a contact's detailed view.

- To view a contact, click the contact's last name link. The Detail View page is displayed, showing the contact's complete contact record.
- To edit a contact, click the contact's last name link and, when the Detail View page is displayed, click the Edit Contact icon above the details.
- For administrators only, to delete one or more contacts quickly, use the Quick Action Checkbox Dialog.

Chapter 4: Using Numara FootPrints

Login

NOTE
The instructions below assume that FootPrints has already been installed and licensed.

Use your web browser to go to the URL assigned to your FootPrints system. For example, if the name of your web server machine is myserver, then the URL might be http://www.myserver.com/footprints. This brings you to the FootPrints Login page.

To log in, enter the user ID and password assigned to you (or the user ID and password created during installation if you just installed FootPrints), and click LOGIN. If you enter your ID or password incorrectly, you receive an error message. If, after another attempt, you are still unable to log in, please contact your Workspace or System Administrator.

If the login attempt is successful, the FootPrints Homepage is displayed and you are logged in to the Workspace created during installation. If, for example, you named the first Workspace Help Desk, this is listed as the current workspace in the top frame of the screen.

IMPORTANT
FootPrints will not work properly if your browser's pop-up blocker is enabled. To resolve this problem, configure your pop-up blocker to allow pop-ups for just the FootPrints application.

Issues

A FootPrints Workspace comprises a set of related Issues. Issue is the default name given to a FootPrints record. Each Issue is a numbered record in the FootPrints Workspace database around which all help desk and problem tracking activity centers. There are different categories of Issues in FootPrints, including regular Issues, Requests, Quick Issues, Subtasks, and Global Issues.

NOTE
During the initial Workspace Setup Wizard (and per Workspace), the administrator is given the chance to change the default term Issue to another name, such as Entry, Call, or Ticket. For clarity, this manual always refers to FootPrints records as Issues.

A user's ability to access fields is determined by the user's role as configured by the Workspace administrator. You may encounter fields in which you are unable to enter data or which become hidden when their status changes. In addition, some fields may be optional in one status and mandatory in another. If you are unsure about why you cannot access a field at one time or another, contact your Workspace administrator to determine why this is.

This chapter covers the basics of creating and working with Issues in the following topics:

- Working with Issues
- Creating Issues
- Create a Test Issue
- Editing Issues
- Edit Test Issue
- Issue History
- Delete an Issue
- Copying Issues
- Unlinking Issues
- Quick Action Dialog
- Requests
- Email Submission of Issues and Requests

A Note On the Appearance of the Create and Edit Issues Pages

Numara FootPrints allows Agents to choose between expandable/collapsible sections or sections displayed as tabs. Agents select the type of view they wish to use in the Issues section of the **Preferences** page. To choose the view, select **Preferences**, select the Issues Tab, and make your selection. Tabs containing mandatory fields are labeled in red text on the Create and Edit Issue pages to assist in finding incomplete mandatory fields. The tabs remain in red even when the fields have been completed. The best way to determine whether all mandatory fields have been completed is to submit the Issue. If any mandatory fields have not been completed, FootPrints will let you know.

Working with Issues

Many options are available for an Issue from the Details screen for that Issue. They include:

- **Details**—Display details of Issue (default).
- **Edit**—Edit the Issue (only available if you have edit permissions to this Issue).
- **Take**—Take the Issue (only available if you have taking permissions).
- **Copy/Move**—This icon opens a second toolbar with options to copy the Issue within the current Workspace or copy or move the Issue to another Workspace.
- **Link**—Link to another Issue in the Workspace or in another Workspace.
- **Subtask**—This icon opens a second toolbar with options to create a Subtask of the Issue or make this Issue a subtask of an existing Issue.
- **Global**—Turn the Issue into a Global Issue or GlobalLink.
- **Delete**—Delete the Issue from the workspace (only available if you have delete permissions for the Issue).
- **Report**—Display a report of this Issue (opens in separate window for printing).
- **Add to KB**—Create a Solution for the Knowledge Base with the details from this Issue (does not change original Issue).

Creating Issues

To create a new Issue in **FootPrints**, click **New Issue** on the **FootPrints** toolbar.

> NOTE
> The names of many of the fields in **FootPrints** can be changed by the administrator (Title, Priority, Status, Description, etc.), as well as the name of the records (Issue). Custom fields can also be created. This manual always refers to **FootPrints** records as "Issues" and uses the default terms for the other field names.

The Create Issue page will appear different depending on whether you have enabled expandable/collapsible sections or tabs. (Refer to *Issue Preferences* for details on enabling expandable/collapsible sections or tabs.) If you have enabled tabs, the names labeling the tabs that contain mandatory fields are displayed in red. The fields and sections/tabs in the Create New Issue page can include:

- **Title**—The title or subject of the Issue.
- **Priority**—The importance or impact of the Issue (customizable).
- **Status**—The stage or workflow step of the Issue (customizable).
- **Contact Information**—Contact information for the customer who reported the Issue. The fields displayed here are different depending on how the administrator has set up **FootPrints**.
- **Issue Information**—Additional information about the Issue. The fields displayed here are different depending on how the administrator has set up **FootPrints**.
- **Description—**Full description of the Issue; it can include a virtually unlimited amount of text. The Description acts as a journal and can be appended to many times. Each time it is appended, the new material receives a time, date and user stamp automatically. The Description field can also contain a drop-down list of quick descriptions. Quick descriptions are pre-defined text that can be used to populate the Description field. For information on quick descriptions that have been defined by your Workspace administrator, contact your Workspace administrator.
- **Search Knowledge Base**—Search the Knowledge Base for a Solution to the Issue and optionally import that Solution into the Description.
- **CI Links**—If your FootPrints includes the Configuration Management add-on module, you may see a CI Links section for linking the Issue to configuration data. Refer to *Numara Configuration Management* in the **Numara FootPrints Reference Manual** or full on-line help for details on this module.
- **Attachments**—Attach one or more files to the Issue.
- **Assignees**—Assign Agents or Teams to work on this Issue.
- **Email**—Choose whether to send email notification on this Issue and also whether to send a Survey to the customer.
- **Time Spent—**Track the time spent on an Issue. Automatic and manual options are available. Can also be used for billing purposes, with hourly billing rates defined for each Agent.

Create Test Issue

NOTE

The names of many of the fields in **FootPrints** can be changed by the administrator (Title, Priority, Status, Description, etc.), as well as the name of the records (Issue). Custom fields can also be created. These fields may also be in a different order from the order described here, and may contain different choices, depending on how the Workspace is configured. For clarity, this manual always refers to **FootPrints** records as Issues, and uses the default terms for the other field names.

1. Enter a Title—Used as the summary or subject line.

NOTE

Although the Title is intended to be brief, it is important to enter meaningful words since it is used to identify the Issue. For example, a good title would be "MS Word crashes when underlining", but "READ THIS–IMPORTANT!!" would not be as effective. This field can optionally be a drop-down box with a defined set of subjects.

2. Select a Priority—The Priority of the Issue is a number or word that indicates the importance or impact of the Issue. Select the appropriate Priority from the drop-down list.
3. Select a Status—The Status is the indication of the current state of the Issue. The valid statuses depend on how the Workspace is configured. Statuses may include "Open", "Pending", "Testing", "Closed", etc. Choose the appropriate Status from the drop-down list. Since you are creating a new Issue, set the Status to "Open."
4. Fill in Contact Information—This section contains the contact information for the Customer associated with this Issue. The Select Contact feature searches the Address Book for the user.
5. Enter Issue Information—The fields that appear here vary according to Workspace and are defined by the FootPrints Workspace Administrator. For example, you may have a field called Platform that is a drop-down box. Select the user's platform from the list of choices. You may also have a field called Version number with a text field next to it. You would type the version number in this field. Consult your FootPrints Workspace Administrator for more information on the Workspace fields in the current Workspace.

NOTE

The fields in your **FootPrints** installation may be different from those shown here, as they can be customized.

NOTE ON RED FIELDS

All fields displayed in red are mandatory and must be filled out.

6. Description—Enter a full description of the issue in this field. You can type an unlimited amount of text in this box. This field is designed to contain a complete description of the Issue and is usually mandatory when creating a new Issue. If you are using the HTML Description Editor, there are many options available to format the text in the Description.
7. Search Knowledge Base (optional)—Search the Knowledge Base for a Solution to the current issue and then import that Solution into the Description.
8. Attach a File (optional)—You can attach one or more files to this Issue from your local or network drive(s).
9. Assignees—The list on the left contains a list of all FootPrints users in this Workspace. To assign someone to this Issue, highlight the user's name on the left and click the arrow button. The name is displayed in the box on the right. Multiple users can be assigned.

Before assigning Agents, you can check Agent availability by clicking the Check Availability icon to see which Agents can be scheduled to work.

- If Teams are enabled, users are listed under their Team name. Both Teams and users can be assigned:
  a. To view the members of a Team, select the Team name. The Team expands with a list of users.
  b. To assign the Team, select Assign Team and click the arrow button. The Team appears in the assignment box.
  c. To assign a particular user, select the user's name and click the arrow button. The user is listed under the Team name in the assignment box.
  d. Multiple users can be assigned from the Team.
  e. To assign another Team, click the Team name to shrink the list and select another Team.
  f. To assign a user without his or her Team, or who doesn't belong to a Team, select the Individual Users option.

NOTE

If the Auto Assign feature is enabled, Teams and or users appear in the Assignee box automatically based on a choice in one of the drop-down fields. Ask your Workspace Administrator whether this feature is enabled.

10. Email Notification—FootPrints' Email Notification feature can send email notification to users when an Issue is created, updated, and closed and can also send a Survey to the customer.
11. Time Spent—This section allows you to enter the amount of time you have spent on this Issue. This can include the entire time spent on this Issue, not necessarily just the time spent filling out the Issue in FootPrints. Fill in the hours and minutes spent. Additional fields may be displayed in this section depending on the Workspace configuration, including Start Time/Date and End Date/Time and Billing Rate. If the field is mandatory and you must enter a Start and End Date/Time, you cannot enter the same Date/Time for both the Start and End (i.e., you cannot enter zero time). If the field is optional, you can enter the same Start and End Date/Times (i.e., you can enter zero time). Consult the Workspace Administrator for more information.
12. Automated Time Tracking—If this feature is enabled, the auto time clock is displayed in the upper-right corner of the Issue above the Title field. You can pause the clock temporarily to stop the clock. Click the pause button again to restart the clock. When you submit the Issue, elapsed time is recorded.
13. Comment—If the Workspace administrator has enabled time tracking comments, you can enter a comment here. The field is limited to 255 characters. Comments in the time tracking field can be viewed in the Time Spent section of an Issue and can be displayed in a report.
14. Submit Issue—When you are ready to submit the Issue, click SAVE. If FootPrints detects that you have left a mandatory field blank or entered something incorrectly (e.g., entered text in a number field), a message is displayed instructing you to go back and fix the Issue.

Once you have successfully submitted the Issue, FootPrints assigns it an Issue number and displays your FootPrints Homepage. From there, you can select the new Issue to view the Details, click Edit to edit the Issue, or perform any other FootPrints task.

Setting Appointments from a Date/Time Field

Users can set an appointment from a date/time field when creating or editing an Issue. To do so:

1. Select the date from the calendar.
2. Select the time for the appointment.
    a. Click in the date/time field or the  icon beside the field.
    b. Enter a start time for the appointment by clicking the Start Time radio button, then clicking on the time fields beside it (e.g., if the meeting begins at 2:30 in the afternoon, click on the 2, then the 30, and then the PM).
    c. Enter a time for the appointment to end by clicking the End Time radio button and then clicking on the time fields beside it.
3. Select whether to link the appointment to the personal calendar, personal and workspace calendars, or neither by selecting a radio button.
4. Click the **GO** button.

Editing Issues

To edit an Issue, the word More at the end of the issue title on the homepage list, then click Edit. You can also click **Edit** on the Details page of that Issue. Normally, an Agent only has edit permissions for Issues to which that Agent is assigned. Administrators can edit any Issue.

NOTE

If you have a button on the Details page of an Issue labeled Take (rather than Edit), the Workspace Administrator has enabled a feature called "Taking". This allows an unassigned Agent user to take any Issue in the database and edit it. Check with your administrator for more information on this feature.

After clicking the Edit button, the Edit page containing the current data for the Issue is displayed. From here, you can make changes in the same way that you enter information when you first create an Issue.

If your organization is licensed for **Numara FootPrints Configuration Management**, all Agents and Customers with edit permissions can see the CIs linked to an Issue when viewing the Edit Issue page regardless of whether they have a Configuration Management license. However, they cannot edit the CI links nor can they take advantage of any other Configuration Management functions without a license.

Quick Edit

The Quick Edit feature allows agents to make edits quickly without viewing the entire issue page. To use the Quick Edit feature, click the Title of an issue in the homepage list. The Quick Edit page is displayed. The page displays built-in fields as well as up to three fields that are configured by your administrator. Complete the fields and submit the issue as you would with a full issue page. Please note that administrators can define rules for attachments that include making attachments mandatory based on the content of certain fields. However, for Quick Edits, attachment rules only apply based on the Status field and not on any additional fields.

Quick Edit Limitation

Dashboard totals do not refresh after a quick edit is submitted. Only the individual row is updated. For example, if a quick edit changed a status from Open to Assigned, the Workspace Totals dashboard component would still count the issue as an Open issue.

Edit Test Issue

You can edit one or more fields on the Edit page. Just skip over the fields that don't require editing.

NOTE
The names of many of the fields in FootPrints can be changed by the administrator (Title, Priority, Status, Description, etc.), as well as the name of the records (Issue). Custom fields can also be created. For clarity, this manual always refers to FootPrints records as Issues, and uses the default terms for the other field names.

1. Title—If you need to edit the title, replace the old text with new text.
2. Priority—To change the priority, choose the new priority from the drop-down box.
3. Status—To change the status, choose the new status from the drop-down box.
4. Contact Information—To choose a contact from the set of contacts in the Address Book, click Select Contact. To update the information for the current contact, change the data and check the Update Contact checkbox; this updates the information in the current Issue and in the Address Book (this feature is not available if the LDAP feature is enabled). To create a new contact, check the Create Contact checkbox and enter the data. This feature is also not available if the LDAP feature is enabled. Click Select Department to choose the contact based on t the contact's department. Click History to view a list of Issues submitted by that contact previously (the contact information must be entered before the History button can assemble a list of previously submitted Issues).

NOTE
The user's Issue history can be viewed by clicking the History button.

5. Issue Information—Replace the old text with new text (or select a new choice from the drop-down box) for each field that you want to edit.
6. Description—Add new notes for the Issue. The original description is kept intact; you are adding a new description with a time/date/user stamp. To view the current description in read-only format, click the link for View Current Description.

NOTE
If the Workspace Administrator has enabled the Edit most recent description option, an additional text box is displayed that contains the most recent description and which may be edited. Check with your administrator for more information.

7. Search Knowledge Base (optional)—Search the Knowledge Base for a Solution to the current Issue, and then import that Solution into the description. Refer to *Creating Issues* for complete instructions.
8. Attachments—You can attach one or more additional files to the Issue each time you edit it. Administrators can define rules for attachments that include restrictions on size and/or file type as well as making attachments mandatory. Rules can be applied based on fields, such as the Status field, which means an attachment may be made mandatory when the status is Open, for example, but not for other statuses. For Quick Edits, attachment rules are based on the Status field only.

9. **Edit Assignees**—To remove an assignee or Team, highlight the name in the box on the right and click . The name is removed from the assignee box and is displayed in the box on the left. To assign a new user, highlight the user's name in the list on the left and click .
10. **Email Notification**—Select the users to receive email notification for this update. The checkboxes for Agent/Contact/CC default to the settings chosen by the Workspace Administrator for the status and priority chosen.
11. **Time Spent**—Enter the additional time you have spent on this Issue. If auto time tracking is enabled, **FootPrints** automatically tracks the time. There is also a link here to edit existing time tracking data. If time tracking comments are enabled, you can also enter comments of up to 255 characters.
12. **History**—The History section of an Issue is only visible with the correct permissions. You cannot edit the History section of an Issue.
13. **Submit Changes**—When you are ready to submit your changes, click **SAVE**. The Issue is updated and the **FootPrints** Homepage is displayed.

If the Issue has multi-line character field(s) with a timestamp, these fields act the same as the Description field in that you cannot edit the existing data, but you can append data to the field. You can edit the data in multi-line character fields that do not have the timestamp.

Issue History

An audit trail of all actions performed on an Issue can be viewed from the Details page of the Issue in the History section.

There are links at the top of the History section for:

- **Complete History**—All activity of the Issue.
- **Issue History**—Actions performed on the Issue by all users and automatically by the system.
- **Email History**—All email activity for the Issue.

The following information is maintained for each entry in the History:

- **Date**—The date the action was performed.
- **Time**—The time the action was performed.
- **User**—The user who performed the action. If the action was performed by the system automatically, the escalation rule is listed here.
- **Action**—The action performed on the Issue, i.e. "Changed Status", "Changed Priority", "Updated Description", etc. The Action column includes initial settings for all FootPrints Issue fields. The Action column describes any changes made to fields in subsequent history entries.
- **Email type**—For email actions, the type of mail (incoming update or outgoing email notification) is displayed and the user who made the update or received the notification.

Notes on History

- The history cannot be changed; it is created by the system automatically.
- Time and date stamps are based on the **FootPrints** server time.

- While all versions of **FootPrints** keep a history of actions for an Issue, the **FootPrints** database versions do not retain as much detail as is maintained in other supported databases.

Deleting an Issue

To delete an Issue, click **Delete** on the Details page of the Issue. Agents can only delete Issues that they created themselves. Workspace and System Administrators can delete any Issue.

NOTE

Deleting an issue in this way does not remove the Issue from the database; it puts the issue in the special status of Deleted. Issues in the Deleted status do not appear in searches or reports unless specifically requested. Issues designated with a status of Deleted provide an intermediate step to archiving and purging Issues from the Workspace.

Workspace and System Administrators can also undelete an Issue. To undelete an Issue:

1. On the **FootPrints** Homepage, choose Deleted from the Display drop-down box. All deleted Issues are displayed.
2. Click **Edit** for the Issue to be undeleted.
3. Click the **Undelete** icon at the top of the page. A new page is displayed with instructions to change the Issue status.
4. Under Status, change the status and click the **GO** icon.. The Status is changed and the Issue is returned to the Workspace.

Converting Regular Issues to Quick Issues

Quick Issues are templates that contain pre-filled information for frequently reported customer Issues, such as "Password Reset", "Service Request", etc. For example, a Quick Issue template for "Password Reset" would start out pre-filled with a description of the problem, the problem categories pre-filled with Network and Password Reset, and perhaps a status of Closed. The Agent only needs to fill in the user's contact information to submit the Issue. The Workspace Administrator can create an unlimited number of templates, which are available to all Agents from the **FootPrints** Toolbar.

Master Quick Issue templates are Quick Issue templates that have subtask templates associated with them.

As long as one Quick Issue or Master Quick Issue template has been created, a drop-down field is provided above the Title field when creating or editing an Issue that allows the Agent to convert the Issue to a Quick Issue or Master Quick Issue. If the regular Issue is converted to a Master Quick Issue, all of the associated subtasks are created at the same time.

To convert an Issue to a Quick Issue:

1. When you are on either the Create Issue or Edit Issue page, select a Quick Issue template from the Use selected template field. The page refreshes and fields are populated by the pre-defined Quick Issue information.
2. Continue with the Issue as you normally would.

Copying Issues

Copying allows you to copy the information from an existing Issue into a new Issue, which can be linked to the original Issue. This feature is useful in a number of situations, for example:

- A closed Issue needs to be reopened, but for administrative purposes a new Issue must be created.
- A new Issue needs to be created that is very similar to an existing Issue.
- An Issue must be moved or copied to another Workspace.
- A new Issue needs to be linked to an existing Issue.

To copy or move an Issue, access the Details page of the Issue and click **Copy/Move**. You have the following choices:

- Copy Issue in this Workspace
- Cross-Workspace Copy
- Move to Another Workspace

There are a number of Copy Restrictions that should be reviewed before copying or moving issues.

Copy Issue to the Same Workspace

1. On the Details page of the Issue, click **Copy/Move**.
2. Choose **Copy in this workspace** and click **GO**.
3. A Create Issue page is displayed, The new page is pre-filled with information from the matching Issue.
4. Click the checkbox to link the new Issue to the matching Issue, if needed (this checkbox is checked by default).
5. Edit the new Issue as needed (editing does not affect the original Issue).
6. Click the **SAVE** button to register the new Issue.
7. If the link checkbox was checked, the link to the original Issue appears in the new Issue. This link is only viewable by internal users, so customers cannot follow the link to an Issue that they don't have permission to view.

Cross-workspace Copy/Move

Issues can be copied or moved between Workspaces. In a multi-Workspace environment, this enables you to escalate Issues between Workspaces. For example, you could have two Workspaces: Help Desk and Development. If an Issue in the Help Desk Workspace must be passed to the Development team, the help desk agent can copy the Issue to the Development Workspace, assigning it to one or more developers.

Copy an Issue to Another Workspace

To copy an Issue between Workspaces:

1. Access the Details page of the Issue.
2. Click **Copy/Move**. A different toolbar is displayed.
3. Select **Cross-Workspace Copy**. A new page is displayed.

4. Choose a destination Workspace from the list. The list contains all active Workspaces in **FootPrints**.
5. As an optional feature, to link the Issues, click in the box next to Create Dynamic Link between new and original Issues.
6. Click **GO**. The Copy Issue to Another Workspace page is displayed.
7. Select the Agent to whom you wish to assign the Issue in the new Workspace. You can also CC: yourself.
8. Click **GO**. A new page is displayed.
9. Workspace fields in the current Workspace that do not match the fields in the destination Workspace are displayed. To append the data from those fields to the description, click the Append radio button. To ignore the data, choose Discard. Field data in the original Issue is not affected.
10. Click **GO** to complete the cross-Workspace copy.

Issues that are linked across Workspaces via a manual copy or a cross-workspace escalation update the other when one is updated. When the new Issue is updated, common fields in the originating Issue, like Description, Title, Priority, etc., are also updated. The same changes are made to the new Issue when the originating Issue is updated. The rules for this workflow are customizable by the Workspace Administrator.

Move an Issue to Another Workspace

1. On the **FootPrints** Homepage, click the number of the Issue to access the Details page of that Issue.
2. On the Details page, click **Copy/Move**. To move the Issue to the destination Workspace and close the Issue in the current workspace, choose **Move to Another Workspace**. A new page is displayed.
3. Choose a destination Workspace from the list. The list contains all active Workspaces in **FootPrints**.
4. Click **GO**. The Move Issue to Another Workspace page is displayed.
5. A list of Workspaces members for the destination Workspace is displayed. Choose one or more assignees by highlighting the names and pressing the CTRL key, then click **GO**. The users selected are assigned to the Issue in the new Workspace. The assignees of the Issue in the originating workspace are not affected. You can also choose to be copied via email on changes to the new Issue.
6. Click **GO**. A new page is displayed.
7. Any Workspace fields in the current Workspace that do not match the fields in the destination Workspace are displayed. To append the data from those fields to the description, click the Append radio button. To ignore the data, choose Discard.
8. Click **GO**. The move is completed.

NOTE

CCs that have been set up for email notification are lost when an Issue is copied or move across workspaces.

Copy Restrictions

FootPrints supports advanced Issue types. These Issue types have special properties and rules associated with them, and therefore have special restrictions:

- For restrictions relating to Global Issues, refer to *Restrictions of Global Issues*.
- For restrictions relating to Master Issues/Subtasks, refer to *Restrictions of Master Issues and Subtasks*.

Linking Issues

In addition to linking Issues by either copying an Issue, creating a Master Issue/Subtask relationship, or via GlobalLinks, Issues can be linked directly to one another. This can be done with a static link, in which changes to one Issue do not affect the data within the other Issue, or with a dynamic link, in which changes to one Issue's status are reflected in the other Issue. Issues can be linked within a Workspace or across Workspaces.

NOTE

The Workspace's Issue workflow rules dictate the fields that get updated for a dynamic link.

To link Issues:

1. Before creating the link, obtain the Issue number of the second Issue you want to link.
2. Go to the Details page of the first Issue you are linking.
3. Click the Link icon at the top of the page. A Make link to Existing Issue/Solution window is displayed.
4. Select the Workspace where the second Issue resides using the Workspace drop-down field.
5. Enter the Issue number of the second Issue to which you want to create a link.
6. Select a Link Type (Static or Dynamic) using the radio buttons.
7. Click **GO**. The link is created.

Unlinking Issues

Issues that are linked can be "unlinked" if you no longer wish the two Issues to be associated with each other. Issues that are linked together can only be unlinked from the Details view of the Issue.

To unlink an Issue from another issue:

1. Open the Issue in the Details view.
2. Select the **Unlink** button:

- **For Copied Issues**—Next to Linked To, select the **Unlink** button. The current Issue is no longer linked to the previously linked issue. The Details view refreshes without the Linked To information.
- **For Master/Subtasks**—In the Related Issues section in the Details view of the Master or the Subtask, select the **Unlink** button. The Issue is no longer linked. If a Master Issue only has

one Subtask, unlinking the two issues removes special properties from both Issues; they revert to regular Issues.

- **For Global Issues and GlobalLinks**—In the Related Issues section in the Details view of the Global or the GlobalLink, select the **Unlink** button. The Issue is no longer linked.

Requests

Viewing Requests

There are a few ways to find out if there are new Requests in the Workspace:

- From the Workspace Totals dashboard component, click the Requests link to display the list.
- Choose Requests from the Display drop-down box on the Homepage.
- The administrator may have configured **FootPrints** email notification to send email to one or more people each time a customer submits a new Request.

Taking Requests

If you have been assigned to a Request, it appears on your assignment list. To take a new Request:

1. Access the Details page of the request to see what it is about.
2. To take the Request, access the Edit page.
3. The status defaults to Open, which turns the Request into an Issue. To choose a different status, select from the list of statuses.
4. Edit the priority, Issue information, append a new description, etc., as necessary.
5. Your name is automatically added as the assignee for this Issue. To change this, move your name back to the Workspace Members box and choose a different Assignee.
6. To send an email update to the customer, make sure that the Contact checkbox is checked in the Email section. The box might already be checked by default based on the rules set by the Workspace Administrator.
7. When you are finished, click **SAVE** to submit the changes.

The Request now becomes an Issue (or Ticket, Entry, etc., depending on the name chosen for your system) and appears on your list of assignments.

Email Submission of Issues and Requests

FootPrints' Incoming Email feature allows users to submit and update Issues via email without logging into **FootPrints**. Check with your **FootPrints** administrator to find out the email account designated for incoming submissions to **FootPrints**.

Searching and Reporting

FootPrints contains a number of options for querying the database. From simple keyword searches to multi-level metrics with color charts, virtually any data can be reported on in FootPrints to analyze activity, trends and statistics with no programming from the FootPrints web interface. Assess how your team's resources are being allocated, review activity and capacity levels, and produce time tracking and billing information for charge-backs and billing. Use report data to justify staff changes, manage the types of problems assigned to each member, and use staff resources in the most effective manner.

Topics in this chapter include:

- Searching
  - **About Searching**—Introduction to search topics.
  - **Quick Search**—Available from anywhere in **FootPrints** from the top frame. Search by keyword or Issue number.
  - **Built-in Queues**—Homepage queues available in **FootPrints**.
  - **Advanced Search**—Complex search on all fields and criteria.
  - **Saved Searches**—Save advanced search criteria to create queues available from the **FootPrints** Homepage.
  - **Cross Workspace Searching**—Search for issues that match criteria for multiple Workspaces
- Reports
  - **About Reporting**—Introduction to reporting topics.
  - **Single Issue Report**—Available from the Details page of an Issue. Displays a printable page.
  - **Quick Report**—Create a report of Issues displayed on the Homepage using the Quick Action dialog.
  - **Custom Reports**—Create custom reports with custom criteria and formatting options, including graphics and multi-level metrics.
  - **Saving and Printing Report Data**—Information on saving and printing report data from the browser.
  - **Saved Reports**—Access saved custom report templates.
  - **Shared Reports**—Report templates that are shared by different users.
  - **Flashboard**—Displays up-to-the-minute graphical representation of help desk and Workspace activity.
  - **Cross-Workspace Reporting**—Custom reports across multiple workspaces.
  - **Time Tracking Reports**—Generate time tracking and billing reports.
  - **Metric Reports**—Generate statistical data and metrics about the Workspace.
  - **Report Templates**—Create single-issue report templates for printing out Purchase Orders, Work Orders, RMA's, etc.
  - **Auto-Run Reports**—Schedule custom reports to be generated and emailed automatically on certain days/times. This can only be done by an administrator.

About Searching

FootPrints contains a number of search facilities that allow you to search and locate specific Issues in the database and create custom queues for the Homepage.

- Quick Search—Available from anywhere in FootPrints from the top frame. Search by keyword, title, or Issue number.
- Built-in Queues—Homepage queues available in FootPrints.
- Advanced Search—Complex search on all fields and criteria.
- Saved Searches—Save advanced search criteria to create queues available from the FootPrints Homepage.
- Cross Workspace Searching—Search for issues across multiple Workspaces.\

NOTE

Search results can be further refined by using Filtering. Refer to topic titled Below the Toolbar for details on Filtering.

Quick Search

The Quick Search is located at the top of a FootPrints page. It is available from any FootPrints screen (in the Address Book, the Quick Search searches the Address Book only).

To use Quick Search, enter the search string in the Quick Search field, select the field to search from the drop-down (using the drop-down arrow), and the click the SEARCH button. A list of all Issues that match your search criteria are displayed.

Keyword Search Fields

The keyword search queries the Title field, Description field, Workspace (Issue) and Address Book fields for all FootPrints database versions (SQL Server, Access, MSDE, Oracle, and MySQL) except for the FootPrints database. The FootPrints database version only searches the Title and Description fields. This keyword search for the FootPrints database can potentially be slow, so an alternative to search only Title is available.

Built-in Queues

The Display drop-down field on the Homepage contains a number of built-in queues. When selected, the Homepage list is updated with the results. To refresh the current list, click Refresh.

NOTE

Under Preferences on the FootPrints Toolbar, the Agent can customize which lists are displayed in the drop-down in the main window of the Homepage.

Built-in queues:

- My Assignments—The most recent active Issues assigned to you. Shown by default.
- Team Assignments—Active Issues for your Team (only displayed if you belong to a Team).
- My Assignments and Requests—Active Issues assigned to you and unassigned Requests from customers.
- My Active Approvals—Lists all Issues for which the Agent is an approver, the Agent may or may not have yet voted, and voting has not been completed. (Applies to Change Management approvers only.)

- My Active Approvals and Assignments—Lists all Issues for which the Agent is an approver, the Agent may or may not have yet voted, and voting has not been completed, as well as the Agent's assignments in the current workspace. (Applies to Change Management approvers only.)
- My Vote Required—Lists all Issues for which the Agent is an approver, the Agent has not yet voted, and voting has not been completed. (Applies to Change Management approvers only.)
- My Vote Required and Assignments— Lists all Issues for which the Agent is an approver, the Agent has not yet voted, and voting has not been completed, as well as the Agent's assignments in the current workspace. (Applies to Change Management approvers only.)
- My Assignments in All Workspaces—Active Issues assigned to you in all Workspaces (only displayed if you belong to multiple Workspaces).
- All Issues—All Issues in the Workspace database (only available if you have rights to see all Issues in the Workspace; otherwise, it displays only Issues you have rights to see).
- Global Issues—All active Global Issues for the Workspace.
- Deleted Issues—Deleted Issues (administrators only).
- Requests—Requests submitted by Customers (see below).
- Knowledge Base—Displays Solutions from the Knowledge Base.
  - Internal Solutions—All internal (more technical) Solutions.
  - Public Solutions—All public (end-user) Solutions.
  - Public Solutions in all Workspaces—All Public Solutions from all Workspaces to which you belong.
  - Internal Pending Solutions—Internal Solutions pending approval before they are published (only displays if you are an approver or you have a pending solution waiting for approval).
  - Public Pending Solutions—Public Solutions pending approval before they are published (only displays if you are an approver or you have a pending solution waiting for approval).

Advanced Search

The Advanced Search feature allows you to search the Workspace database on any combination of fields and advanced criteria. FootPrints automatically generates the Advanced Search form for each workspace, with all of the custom and built-in fields for that Workspace included. For example, if a new field is added by the Workspace Administrator, the field is included automatically on the Advanced Search form. In the same way, if a field is deleted from the workspace, it is removed from the Advanced Search page.

To perform an Advanced Search, click Advanced below the Quick Search dialog. This form contains a combination of text fields, drop-down boxes, multi-select dialogs, and radio buttons which allow you to search on any combination of criteria. Each field acts as a filter. Only fill in or choose the criteria you want to search on. Any field that you do not want to perform a search on should remain untouched. Some Boolean operators can be used within in text fields.

Topics in this section:

- Advanced Search Criteria
- Sample Advanced Search

Advanced Search Criteria

The following options are available in the Advanced Search form, as well as the forms for Custom Reports, Time Tracking Reports, and Escalation and Business Rules (with minor differences):

NOTE
The names of many of the fields in FootPrints can be changed by the administrator (Title, Priority, Status, Description, etc.), as well as the name of the records (Issue). Custom fields can also be created. For clarity, this manual always refers to FootPrints records as "Issues," and uses the default terms for the other field names.

1. Issue Tab-General Information

    - Title—Enter a word or phrase to for which to search. Boolean operators AND, OR, and NODATA are supported. Boolean Operators
    - Description—If a word or phrase is entered (or multiple words using Boolean Operators), only Issues containing that word/phrase in the Description are returned.
    - Keyword—If a word or phrase is entered, any Issues containing that word/phrase in any field are returned, including Title, Description, Workspace fields, and Address Book fields, as long as the full text search conforms to full text keyword search behavior.
        - Fields Included: The Keyword search queries the Title field, Description field, Workspace (Issue), and Address Book fields for all FootPrints database versions (SQL Server, Access, MSDE, Oracle, and MySQL) except for the FootPrints database. The FootPrints database version only searches the Title and Description.
    - File Attachments—Search for file attachments by name (not by content). Available in all versions except the FootPrints database.
    - Assigned to—Highlight one or more users to returns Issues assigned to the user(s) selected, holding down the CTRL key to select multiple users. If you do not want to limit the search to any particular assignees, do not highlight any users. Advanced Controls are also available for this field.

NOTE ON PERMISSIONS
Access to Issues is based on a user's Role. Assignment options may be restricted based on your role. Please consult your FootPrints administrator for more information.

    - Submitted by—If a user is selected, the search returns only Issues created by that user.
    - Priority—Returns only Issues of the specified priority or priorities. Highlight the priorities to be included; hold down the CTRL key to highlight multiple priorities. To return all priorities, no priorities need to be selected (this has the same result as selecting all priorities).
    - Status—Returns only Issues of the specified status(es). By default, Open and any custom statuses are highlighted in the status dialog. To select multiple statuses, hold down the CTRL key. To return all statuses, no statuses need to be selected (this has the same result as selecting all statuses).

2. Issue Tab-Issue Information—The fields in this section differ depending on the fields in the current Workspace. Search on as many fields as desired. Search methods vary with the field data types:

- **Character field**—Displays a text box. Enter the word or phrase to search on (or multiple words using Boolean Operators).
- **Number field**—Displays a text box. Enter the number or part of a number for which to search.
- **Drop-down and Multi-select field**—Displays a multi-select dialog box. Highlight one or more values to search on. To search for Issues that contain no data for the field, select No data. If you do not want to restrict the search based on choices in a field, do not highlight any values.
- **Date fields**—Search on a date or date range.

NOTE

Date/time fields can only be searched by date, not time.

- **Other field types**—Email, URL, and FTP fields display a text box. Enter the word or phrase to search on (including partial addresses).

3. **Contact Tab**
4. **Advanced Criteria Tab**

- **Issue Types to Include**—Specify whether Advanced Issue types, including Subtasks and Global Issues, are returned. Options include:
  - **All Issue Types**—All Issue types are returned.
  - **Regular Issues**—Regular (non-Global or Master/Subtask) Issues are returned.
  - **Include Master Issues**—Master Issues that contain subtasks are returned.
  - **Include Subtasks**—Subtasks of Master Issues are returned.
  - **Include Global Issues**—Global Issues are returned.
  - **Include GlobalLinks**—All users' Issues linked to a Global Issue are returned.
  - **Group Master Issues with Subtasks/Global Issues with Global Links**—Available for Reports only. These options override the sort order selected in the report.
- **Date**—If dates are specified, the search returns only Issues from the time period specified.

NOTE

It is important to understand the meaning of relative periods and aging in order to obtain accurate information, especially as the searching and reporting functions of **FootPrints** rely on the same types of criteria. If a search is requested on Issues for "the previous three months," and the date is the 15th of May, then the period searched or reported on will be from February 15th through May 14th, inclusive. That is, the report or search will exclude the current date and give the three month period prior to the current date. This is to ensure that reports and searches yield consistent results. If reports and searches included the current date, then the results might differ depending on the time of day at which the search or report was performed.

- **Time**—Specify the time in which the Issues were created or last edited based on the 24 hour clock. Available for Reports only.
- **Age**—Returns Issues created in the time specified. Number of days and hours can be specified. Modifiers are also provided, including “Greater Than”, “Less Than”, “Equal to”, “Greater than or Equal to”, “Less than or Equal to”, and “Not Equal to”. As an example, to return Issues greater than 1 day old, choose “Greater than” and fill in “1” for “Days”.

NOTE

Age is always 24/7 and does not use the Workspace Work Calendar.

- **Include only Issue Numbers**—Restricts the search to a defined range of Issue numbers.
- **Advanced Date/Time Controls**—The following "Pending Clock" options apply to the "Time to Close" and "Age" calculations (available for Reports only):
  - **Don't include time outside of the Workspace Work Calendar**—If this is checked, the calculations do not include after-hours time based on the work calendar for the workspace.
  - **Don't include time Issues spent in the following Statuses**—Select one more statuses (Pending, Waiting for Customer, etc.) to exclude time spent for the "Time to Close" and "Age" calculations.

NOTE

These time calculations are always based on the time zone in which the server resides.

- **Order Search Results by**—Order the Issues returned by the specified field, descending (most recent or highest first) or ascending (oldest or lowest first). By default, Issues returned are ordered by Issue number descending. This overrides your preferences.
- **Make title, description, etc. case sensitive** (FootPrints database version only)—Check this box to make the search case sensitive. By default, the search is case insensitive. In the SQL/Access versions of FootPrints, searches are always case-insensitive.
- **Use Regular Expressions** (FootPrints database version only)—Optionally use regular expression matching to search all text fields, including Title, Description, and any custom character fields. Click the link for instructions on using regular expressions. This feature is not available in the SQL/Access versions (which instead support Boolean operators).
- **And/Or**—If “And” is chosen, Issues must match all criteria chosen above (this is the default). If “Or” is chosen, only one criterion must be met.

5. **Save/Run Tab**—Save the search criteria as a queue. Choose “Personal” to save search for yourself. Choose “Shared/Internal” to share your search with other internal FootPrints users. “Shared/Public” is available for reports only to allow all users (including Customers) to access the report (the report will only contain data user is allowed to see). Saved search queues appear in the Display Drop-down on the homepage.

For all text fields, regardless of section, entering just the % symbol finds all Issues with any data in that field.

When you are finished filling out the form, use the Save/Run tab to submit search. The Homepage is displayed with a list of matches. If a name was entered for the search, it appears as a queue in the Display drop-down.

Sample Advanced Search

The following search returns all Active Issues assigned to the user Jill Smith that are priority Urgent or High.

1. Click Advanced under the Search heading on the **FootPrints** Toolbar.
2. For Assigned to, choose Jill Smith.
3. For Priority, select Urgent and High (hold down the CTRL key).
4. For Status, highlight Open, Need More Info, and Pending.
5. To save this search, enter a name for the search, e.g., My High Priority Issues.
6. Click **GO**.

FootPrints returns a list of the Issues that match the above criteria.

Saved Searches

The Saved Searches feature can be used to save and name search criteria that are used frequently to create queues or "hot lists". Each time the saved search is run, it returns the latest data from the current Workspace. Saved searches are available from the Display drop–down box on the Homepage and from the **FootPrints** Toolbar. More information on creating saved searches can be found in the preceding topic on Advanced Search.

There are two kinds of saved searches:

- **Personal Searches**—Personal saved searches are viewable only by you and are accessed via the Display drop-down on the home page or by mousing over the Advanced search link. You can create personal queues for your own assignments of different types, overdue Issues, assignments with a due date for the next week, a follow-up date of today, etc. All Agents have access to create and save personal searches.
- **Shared Searches**—Shared searches appear in the Display drop–down box for all Agent/administrator users in the current Workspace. This is useful for creating shared queues for different groups, departments, locations, problem types, etc. Shared searches can only be viewed, edited, or deleted by users with the proper permissions.

Using Saved Searches

You can run, edit, or delete a saved search by mousing over the Advanced search link and then clicking Saved Searches on the menu.

To run a previously saved search:

1. Mouse over the Advanced search link and click Saved Searches on the menu that is displayed.
2. Choose the search you want to run from either the Personal or Shared Searches drop-down.
3. Click the radio button for Run (this is the default).
4. Click GO. The results of the search are displayed in the main frame of the browser window.

To edit a previously saved search:

1. Mouse over the Advanced search link and click Saved Searches on the menu that is displayed.
2. Choose the search you want to edit from either the Personal or Shared Searches drop-down.
3. Click the radio button for Edit.
4. Click GO. The Advanced Search page is displayed. The form is pre–filled with the search criteria from the saved search.
5. Make any changes necessary.
6. To save the new search criteria with the same name as the original, leave the name in the Save this Search As text box as–is. To save it as a new search, enter a different name.
7. When you are finished, click **GO**. The results of the edited search are displayed in the browser window.

To delete a previously saved search:

1. Mouse over the Advanced search link and click Saved Searches on the menu that is displayed.
2. Choose the search you want to delete from either the Personal or Shared Searches drop-down.
3. Click the radio button for Delete.
4. Click **GO**. The saved search is deleted.

Cross Workspace Searching

Each **FootPrints** Workspace is contained in a separate sub-database. Each Workspace has its own fields, users, and other options. You may be a member of one Workspace or you could have membership in several Workspaces. If you are a member of two or more Workspaces, and your Role allows it, it is possible to display Issues that match search criteria from multiple Workspaces.

NOTE

Cross-workspace searches do not work for a person who is an Agent in one Workspace and a customer in another. If an Agent performs a Cross-workspace search, the results do not contain Issues from the Workspace in which the Agent is a customer.

Some characteristics of cross Workspace searches include:

- You can only search on fields that exist in all selected Workspaces.
- You can only sort on fields that exist in all selected Workspaces.
- You can select any field from any Workspace as long as it does not exist in multiple Workspaces with conflicting types.
- The Quick Action Checkbox dialog is not shown.
- The Workspace Totals scoreboard and Global Issues list is hidden.
- Issues from your default Workspace are always listed first; subsequent issues are ordered by ascending Workspace number.
- Filters can be applied to the columns in your cross workspace search results.
- If you choose to view the details of an Issue from a different Workspace, that Workspace is displayed.
- Cross Workspace searches may be saved as personal or shared.
- You can only see shared searches that include Workspaces to which you belong. Therefore, there may be two shared searches that have the same name that are saved by different Agents. **Footprints** adds a number 2 next to one of the searches to help distinguish between them for Agents who have access to all the included Workspaces.
- Cross Workspace searches do not work for a person who is an Agent in one workspace and a customer in another. If an Agent performs a cross Workspace search, the results do not contain Issues from the Workspace in which the Agent is a customer.

Create a Cross Workspace Search

1. Mouse over the Advanced search link and click Cross Workspace on the menu that is displayed.
2. **Included Workspaces**—Highlight the Workspaces to be included in the search. Hold down the CTRL key to select multiple Workspaces. Click **GO** when you are finished. The Search Criteria page is displayed.
3. **Criteria**—Cross-Workspace searches can include built-in fields like Title, Description, Status, Priority, etc. For additional information on specifying search criteria, refer to *Advanced Search Criteria*.
4. Optionally save your search for later personal use or as a shared search to share with other Agents in the workspace.
5. When you are finished entering the search criteria, click **GO**.
6. The results of the search are displayed in the main frame, with issues grouped by Workspace under the Workspace name. You can click on the row that contains the workspace name to collapse/expand the issues listed for that workspace.

NOTE ON PERMISSIONS

Searches can be restricted based on a user's Role. Cross-Workspace Searches may not be available if your role does not allow access. Please consult your **FootPrints** administrator for more information. Also, cross-workspace searches are not available to customers.

About Reporting

FootPrints contains a number of reporting options. From simple keyword searches to multi-level metrics with color charts, virtually any data can be reported on in **FootPrints** to analyze activity, trends, and statistics with no programming from the **FootPrints** web interface. Report data can help you assess how your team's resources are being allocated, review activity and capacity levels, and produce time tracking and billing information for charge-backs and billing. Use report data to justify staff changes, manage the types of problems assigned to each member, and use staff resources in the most effective manner.

Single Issue Report

This option appears on the Details page for an Issue. Click **Report** on the Details page to display a printable report of the Issue. Only the fields that contain data appear in the report. This report is useful when you need to quickly print the details of an Issue. To display a single issue report, click the Report button on the Details page of the issue, select a report format from the drop-down, and then click the GO button.

Other features:

- Master Issue reports contain a list of all Subtasks. Global Issues contain a list of all GlobalLinks.
- If one or more report templates are configured, an option to format the report using one of the templates is available.
- The Single Issue report can be printed from the browser or saved as an HTML file.

Quick Report

This feature allows you to quickly report on one or more Issues. It can be done from the Homepage or from the results of a search. This is useful when you want a report of one or more issues displayed on the Homepage without creating a custom report.

To create a Quick Report:

1. On the **FootPrints** Homepage, select the Issues to be included in the report using the Quick Action Checkbox dialog.
2. To select all Issues on the Homepage, click the All checkbox.
3. Choose Report from the drop-down box above the checkboxes.
4. Select a report format from the drop-down,
5. Click **GO**.
   - A new browser window opens containing the report results. It can be printed or saved directly from the browser.
5. If one or more report templates are configured, an option to format the Issues using one of the templates is available. If a custom Report Template is used, each Issue selected is displayed in a separate window for printing purposes. If Summary is selected, all Issues are contained in one window.

Custom Reports

The Custom Reports feature allows you to create report templates based on any combination of criteria, with many formatting options. Formatting options include headings, columns, sorting, and color graphs. Single and two-level metrics based on any fields can be included. Report output can be exported to another application (such as Excel) and can be scheduled to be run on a regular basis.

Report Options

NOTE
The names of many of the fields in **FootPrints** can be changed by the administrator (Title, Priority, Status, Description, etc.), as well as the name of the records (Issue). Custom fields can also be created. For clarity, this manual always refers to **FootPrints** records as "Issues" and uses the default terms for the other field names.

To create a custom report, select Reports | New Report from the **FootPrints** Toolbar. The Custom Report Wizard is displayed:

1. **Step 1: Style**—Select the output style of the report. Choices are:
   - **Columns**—Issue data is displayed in fixed columns. One Issue is displayed per row. Columns can be selected from any available fields.
   - **Wrapped**—Each Issue returned is displayed in its own mini-table. Line breaks can be used to wrap data to multiple rows, for example, to place the Description in its own row. This style is useful for printing reports that contain many fields.
   - **Metrics and Graphics**—Create custom metrics and graphs of counts, averages and sums on any field. Single and two-level metrics are supported. Output options include table, bar, and pie charts.
   - **Export**—Export data to a text file that can be saved to your local desktop. Use this format to import **FootPrints** data into a spreadsheet or other programs

- **Include metrics...**—Column and Wrapped reports can also contain metric charts and graphs. Check this box to include metrics in a Column or Wrapped report (not available for Export option).

2. Click **GO** to display the rest of the report options. The steps on the next page depend on the report style selected in Step 1.
3. **Step 2: Heading**—Define what is included in the heading at the top of the report output. Available for all styles except Export. Options include:

- **Title**—This is displayed at the top of the report.
- **Date**—The date the report is run (updates each time the report template is re-run).
- **Time**—The time the report is run (updates each time the report template is re-run).
- **Workspace name**—The name of the Workspace.
- **Logo graphic**—The logo image displayed in the current Workspace.

4. **There are two possible steps 3.** One is for column and wrapped reports and the other is for metric reports and combo reports.

   a. **Step 3: Formatting**—Select the columns to display in the report. All fields are available. This option is available for all styles except Metrics. For example, to display Title:

      - For Type of Field, choose FootPrints Fields.
      - Highlight Title under Fields.
      - Click Add Field. Title now is added to the Selected Fields box.
      - **Email History**—The Email History field is a special field that includes the email history in the report. This provides an audit trail in reporting. Because this type of report searches every record included in the report for every email notification, using this field can cause a slowdown in the reporting.
      - **History**—The History field is a special field that includes the Issue history in the report. This provides an audit trail in reporting. Because this type of report searches every record of every change to the Issues that are being reported, using this field can cause a slowdown in the reporting.
      - **Re-order**—To change the order of fields to be displayed, highlight a field in the Selected Fields box and click the up or down arrow to move it.
      - **Line Break**—Insert a line break (Wrapped style only).
      - **Description**—Choose which descriptions to include in the report and when to wrap the data (only applies if Description is included in the Selected Fields box). You can include the original, newest, two most recent, or three most recent descriptions in your report.

NOTE

An Original Description option is not available for the **FootPrints** database.

- **Assignees**—If Assignees is selected, the full names of the assignees are displayed in the report (e.g., Bob Smith). This is not suitable for importing the report output into another Workspace, as user ID's must be specified in a data import file. To create a file that includes assignees user IDs (e.g., Bob Smith), use the System Administration Export Workspace Data option.
- **Sort Order**—Define how Issues are sorted in the report output. This option is available for all styles except Metrics. The default is by Issue number in ascending order (from lowest to highest). Optionally sort on up to any three fields, ascending or descending. Issues are sub-sorted within each field based on the sort order.

Clicking the Heading box separates Issues into groups with the field name as header. For example, if sorting by Status with Heading checked, all Open Issues are grouped under the heading Open, Closed Issues are grouped under the heading Closed, etc.

b. Step 3: Metrics— Create custom metrics and graphs of counts, averages, and sums on any field. The option is available for Metric style and for Column and Wrapped style if the Combo checkbox is checked.

1. Type—Each metric can represent one of the following types:
    - Count—A count on field data. Applies to virtually any field, including Status, Priority, and most Issue Information and Contact Information fields. Does not apply to Title, Description, and multi-line text fields, as these usually contain unique data. For example, a count on the Status field would return the number of Issues in each status.
    - Average—An average on the sum of all field data for the Issues returned. Only applies to built-in statistics and custom number fields. The built-in statistics available are:
        - Age of Issue—The elapsed time since the Issue was created (should only be applied to reports that report on active Issues).
        - Time to Close—The elapsed time from when the Issue was created until the Issue was closed (should only be applied to reports that report on closed Issues).
        - Total Billing—Total amount billed for the Issue based on time tracking data and users' hourly billing rates.
        - Total Time—Total work time spent on the Issue based on time tracking data.

NOTE

The Total Billing and Total Time statistics are based on the total life of the issue, regardless of date ranges or users selected in the report criteria. For time tracking data for specific users and date ranges, please use the time tracking reports.

- Sum—The sum of all field data for the Issues returned for the field specified. Only applies to built-in statistics mentioned above and custom number fields.

2. Field—Select the field for which to create a metric. The fields available depend on the fields in the current Workspace and the metric type (see above).
3. Subtotal By—A two-level metric can be reported by selecting a second field here. For example, if Average Age of Issue was selected as the first field and Assignee is selected here as the subtotal, the average age of Issues is broken down by Agent assigned. This feature is optional.
    - If, in the Subtotal By field, the user selects a date or date/time field, a dependency drop-down is displayed so that the user can specify that the subtotal be broken down by day, week, month, year, quarter, day of week, day and hour, or hour.
4. Format—Select the output style for the metric. Options are:
    - Table—Displays data in a text-based table.
    - Chart—Displays data in a color graphical chart (see below).
    - Table and Chart—Both tables and charts are displayed (default).
5. Chart Type—If Chart or Table and Chart are selected, select a chart type. Options are:
    - Bar—Color bar graph, with one bar for each value. For two-level metrics, one long bar chart or multiple charts can be created.

- o **Pie**—Displays data in a color pie chart. For two-level metrics, a series of pie charts are displayed.

6. **Sort**—Select how the data is sorted in the output:
    - o **By Field/Subtotal data**—Data is sorted by alphabetical or logical field data order.
    - o **By metric values**—Data is sorted by frequency or amount descending. If the metric is a count by Status, then the statuses are displayed in the chart from highest to lowest: Open-34, Pending-22, Waiting for Approval-4, etc.
    - o For two-level metrics, the second field is sorted within each group of the first field.
7. **Display Position**—Choose to place metrics before or after detailed Issue data (Combo reports only).
8. Click **Add** to add the metric to the report. The metric is added to the dialog box to the right.
9. Continue to create additional metrics following the steps above.

NOTE

The options above are for selecting the metrics to be reported on. The results are affected by the criteria selected for the report in the Report Criteria section. For example, if a metric of count on Status is selected, the number of Issues per Status returned is different if the criteria limits the report to only high priority Issues, as opposed to all priorities. The criteria must be selected carefully to ensure meaningful metrics.

This section only determines which fields to display; it does not determine the selection criteria for the report. The criteria are chosen later in the report.

5. **Step 4: Select Criteria**—Choose the criteria, using issue fields, for the report. Only select the criteria you want to search on.
6. **Step 5: Contact Criteria**— Choose any additional criteria, using address book fields, for the report. Only select the criteria you want to search on.
7. **Step 6: Advanced Criteria**— The **FootPrints** Advanced Reporting criteria section uses the same mechanism as the Advanced Search. Refer to section above on *Advanced Search* for detailed explanation of criteria.

NOTE

It is important to understand the meaning of relative periods and aging in order to obtain accurate information, especially as the searching and reporting functions of **FootPrints** rely on the same types of criteria. If a search is requested on Issues for "the previous three months," and the date is the 15th of May, then the period searched or reported on will be from February 15th through May 14th, inclusive. That is, the report or search will exclude the current date and give the three month period prior to the current date. This is to ensure that reports and searches yield consistent results. If reports and searches included the current date, then the results might differ depending on the time of day at which the search or report was performed.

8. **Step 7: Run Report**—Click **GO** to run the report. To save the report, enter a name before you run it. Choose Personal to save the report for yourself. Choose Shared/Internal to share your report template with other internal **FootPrints** users. Shared/Public reports are available to all users including customers (the report only contains data the user is allowed to see). Shared/Public reports appear on the customer Pre-Defined Reports page. Each time a saved report template is run, it returns the latest matching data.

NOTE

Saving the report here only saves the report formatting options and criteria chosen in this form, not the results of the report. This feature can be used to run the same report in the future, for example, once a week. Each time the report is run, it returns the latest data from the current Workspace. Saving report output is covered in the topic on *Saving and Printing Report Data*.

After clicking **GO**, the report is displayed in a separate browser window. Large reports sometimes take a few minutes to run. To view the details of an Issue, click the Issue number (or whatever field is in the first column) in the report. This displays the Details page for that Issue in the main **FootPrints** frame.

The report can be saved or printed from the browser window. If the Export style was selected, a Save As dialog box is displayed. Save and name the report to your local hard drive.

NOTE ON PERMISSIONS

Reports can be restricted based on a user's Role. Custom Reports may not be available or some options may not appear if your role does not allow access. Please consult your **FootPrints** administrator for more information.

Saving and Printing Report Data

Report data can be saved, printed, and distributed in a number of ways:

- **HTML**—After the report is displayed, it can be saved as an HTML file right from the browser window.

  To save report data in:

  - **Internet Explorer**:
    1. Choose File | Save As in the browser.
    2. Enter a name under which to save file.
    3. Choose the type of file to save report as (e.g., HTML) for Save as type.
    4. Browse in the Save In dialog to choose where on the local machine to save the file.
    5. Click the Save button.
  - **FireFox**:
    1. Choose File | Save Page As.
    2. Choose "**All Files**" for "**Save as type**".
    3. Enter a name to save file as in "**File name**", and include the .html extension in the name. For example, to save the report as "**My Report**", the name should be "**My Report.html**".
    4. Use "**Save In**" to choose where to save the file.
    5. Click the "**Save**" button.
- **Text File**—If Export is chosen for report style, report data is saved to your local machine. After clicking **GO**, a Save As dialog box is displayed. Choose where on your local machine or network to save the file and click Save.
- **Printing**—Reports can be printed right from the browser. Choose File | Print to display the browser's Print dialog box. If the report is wider than the screen, choose Landscape orientation. There are certain functions of the browser that **FootPrints** cannot override. For example, page breaks cannot be controlled when printing directly from the browser

(this is a function of HTML). In addition, for very wide reports, some text on the right may be cut off by the printer, even when printing in Landscape mode. To compensate, if the Description or other multi-line text field is included in the report, use the Description Wrapping feature to force the text to wrap more narrowly. For example, instead of wrapping at 70 characters (the default), try 50 characters. If text is still being cut off, we recommend trying the Wrapped report and inserting line breaks, or using the Export option.

- **Auto Run Reports**—Saved report templates can be scheduled by an administrator to run automatically, with the output emailed to a defined set of users and saved to the server. Please refer to *Auto Run Reports* in the **Numara FootPrints Reference Manual** for more information.

Saved Reports

Custom report templates can be saved and run at any time. Each time a saved report is run, it returns the latest data from the current Workspace. Reports can be saved for personal use and for other Workspace members. Access to saved reports is defined by a user's Role.

Instructions on creating and saving report templates can be found in the section titled *Custom Reports*.

Shared Reports

Report templates can be shared with other **FootPrints** users:

- **Shared/Internal Reports** appear on the Saved Reports page for Agents in the Workspace who have access to Shared Reports. An Agent whose role restricts him or her to seeing only his own Issues or his Team's Issues only sees those Issues that match the criteria of the report and that he is allowed to see.
- **Shared/Public Reports** are also available to customers, but such reports only contain data the customer is allowed to see (either his or her own Issues or those of the Organizational Unit).

Instructions on creating and saving report templates can be found in the section titled *Custom Reports*. Each time a saved report template is run, it returns the latest matching data.

Run a Saved Personal or Shared Report

1. Select Reports | My Reports from the **FootPrints** Toolbar.
2. Choose the report you want to run from the Personal Reports, Shared Reports, or Metric Reports drop-down.
3. Select Run(this is the default).
4. Click **GO**. The report results are displayed in a separate browser window. If the report template is of Export style, the Save As Windows dialog is displayed instead.

Edit a Saved or Shared Report

1. Select Reports | My Reports from the **FootPrints** Toolbar.
2. Choose the report you want to edit from the Personal Reports, Shared Reports, or Metric Reports drop-down.
3. Select Edit above the corresponding drop-down.
4. Click **GO**. The Custom Report page is displayed, pre-filled with the report criteria and formatting options.

5. Make your changes.
6. To save the edited report with the same name as the original, leave the name in the Save this Report As text box as-is. To save it as a new report, enter a different name.
7. When you are finished, click GO. The report results are displayed in a separate browser window. If the report template is of Export style, the Save As Windows dialog is displayed instead.

Delete a Saved or Shared Report

1. Select Reports | My Reports from the FootPrints Toolbar..
2. Choose the report you want to delete from the Personal Reports, Shared Reports, or Metric Reports drop-down.
3. Select Delete above the corresponding drop-down.
4. Click GO. The saved report template is deleted.
5. Deleting a Shared Report deletes the report for all users.

NOTE ON PERMISSIONS

Shared reports are available to run, edit, and delete based on a user's role. If your role does not allowed access, some of the options described above may not be displayed or otherwise available to you. Please consult your FootPrints administrator for more information.

Metric Reports

Metric reports return statistical data and metrics about the Workspace, rather than returning specific Issue data. Output options include HTML Text, Graphical, and Text File Export. The information returned by these reports can help you measure how well your organization performs and where improvement is needed.

The following reports can be run from the Reports | Metrics reporting menu:

- Current Performance by Team/Agent—Report on Issues currently active in the Workspace, grouped by assignee(s).
- Issue Statistics—Provide quick statistical information on specific groups of Issues.
- First Call Resolution—Determine the percentage of Issues that were created with a status of Closed versus the number of issues that were received for a specific time period.
- Resolution Rate—Determine the rate at which Issues are resolved for specific criteria.
- Received vs. Closed Reports—List how many Issues were received and how many were closed, based on specific criteria.
- Turn-around Time—Measure how long issues have remained in a particular status or how long it takes to get from one status to another.
- Service-level Agreements—The service-level agreements reporting option returns the number and percent of Issues achieved, breached, resolved and unresolved per service-level agreement. This type of report cannot be saved and auto run.
- Historical—Return historical data on Issues in the current Workspace, including past statuses, priorities, and elapsed time. This type of report cannot be saved and auto run.
- Query Statistics—Return statistics on searches of the database, which can be categorized by whether they were performed by Customers or Agents. This type of report cannot be saved and auto run.

NOTE ON TEAMS

In all reports broken down by assignee, the bar/slice/row for a team only lists Issues assigned to that team and none of its members. If a ticket is assigned to multiple teams, it counts for each team, just the way a ticket assigned to multiple Agents counts for each Agent. If a ticket is assigned to Team A, Team B, and a member of Team B, it counts for Team A and the member of Team B. If a ticket is assigned to Team A, Team B, and an Agent who is a member of both teams, it only counts for the Agent.

NOTE ON COUNTS BY ASSIGNEE

Counts broken down by assignee may not add up to the total number of Issues in a report if Issues are assigned to multiple people.

Current Agent/Team Performance

Current Performance by Team/Agent provides reports on Issues currently active in the Workspace, grouped by assignee(s). The report shows the average age of active Issues by assignee, allowing you to extrapolate meaning for the data in terms of "performance". Assignees can be individuals or teams.

If no teams are defined for your Workspace, you are only offered the choice to report by Agent.

The options for report output are:

- **HTML**—Display report as HTML in a browser window.
- **Graphical**—Create chart images (JPEG files) that can be printed or saved to disk and imported into another program.
- **Export**—Create a text file which can be read by spreadsheets and other programs.

If you have grouped your Agents into teams, you are offered all of the following choices:

- **Team and Agent**—Break down active Issues by teams and Agents. Agents who belong to teams are listed under their team.

NOTE

When the report includes totals for both teams and Agents, the totals for the team row do not include Issues that are assigned to individuals within the Team.

- **Team**—Break down active Issues by teams only.

NOTE

Each team total also includes Issues assigned to individual Agents within the team.

- **Agent**—Break down active Issues by Agents only.

NOTE

Issues assigned to multiple Agents are included in the totals for each Agent. This means that the total number of Issues as reported here may exceed the total number of Issues you see elsewhere. The reason for this is that a single Issue with multiple assignees is counted for each of the assignees; if you have three Agents assigned to an Issue, it is counted three times.

Issue Statistics

Issue Statistics reports provide quick information on specific groups of Issues. Exact and relative time (e.g., before or after date *x*) periods are available. To include all Issues, select After and a date before the first Issue was created or use Before and select tomorrow's date.

The options for report output are:

- **HTML**—Display report as HTML in a browser window.
- **Graphical**—Create chart images (JPEG files) that can be printed or saved to disk and imported into another program.
- **Export**—Create a text file which can be read by spreadsheets and other programs.

The following Issue Statistic reports are available:

- **Open Issues by Priority**—Number of Issues with Open status by priority, with the average time the Issues have been open.
- **Closed Issues by Priority**—Number of Issues with Closed status by priority, with the average time the Issues took to close.
- **Active Issues by Priority**—Number of active Issues (includes Open, Requests, and any custom statuses) by priority, with the average time the Issues have been open.
- **Active Issues by Status**—Number of active Issues (includes Open, Requests, and any custom statuses) by status and the average time the Issues have been open.
- **All Issues by Status**—Number of all Issues by status and the average time the Issue has existed since it was opened. This includes time that an Issue may have been in the Closed status.
- **Active Issues by Assignee**—Number of current active Issues (includes Open, Requests, and any status except Closed) by assignee and the average time the Issues have been open.
- **Closed Issues by Assignee**—Number of closed Issues in the workspace by assignee and the average time each assignee took to close the Issues.

NOTE

When viewing report data by assignee, remember that an Issue can be assigned to more than one individual or team at a time. When an Issue is assigned to more than one individual and/or team, it is counted in the report for each assignee, that is, an Issue assigned to three people and one team would be counted for each of the individuals and the one team. This means that, if you count up the total number of active Issues in the report, they can exceed the total given for the number of active Issues that you see displayed on the Homepage.

Received vs Closed

Received vs. Closed reports list how many issues were received, and how many were closed, based on specific criteria.

The options for report output are:

- **HTML** - Display report as HTML in a browser window.
- **Graphical** - Create chart images (JPEG files) that can be printed or saved to disk and imported into another program.
- **Export** - Create a text file which can be read by spreadsheets and other programs.

The options for creating Received vs. Closed reports when you select the sub-categories of either By Priority or By Assignee are:

- **Report by**—Specify the time period by which to group issues.
- **Time Period**—Define the date range for searching.
  - **Exact**—Specify exact dates to search on in the period specified. Enter the date or dates to search on. Click to display a searchable calendar.

  - **On**—Specify a particular date (leave second date blank).

NOTE
When "on" a single date is chosen, and you are reporting by month, the report contains Issues for the month that date is in. If "on" a single date is chosen, and you are reporting by week, the report contains Issues for the week the date is in.

  - **Before**—Issues that were created/last edited before the specified date are returned (leave second date blank).
  - **After**—Issues that were created/edited after the specified date are returned (leave second date blank).
  - **Between**—Returns Issues created/last edited between the dates specified (use both date fields).
- **Relative**—Searches by relative date, allowing you to create a search or report that for example, returns Issues for the last month. Select a number from the first drop-down (1-31), and select the period from the second drop-down (Day, Week, Month, or Year).
- **Range**—Select this to search by a particular time period, e.g., yesterday, last Sunday, etc.

Additional **Received vs. Closed** reports can be generated which bypass the reporting step that requires you to fill in the options defined above. Those reports are:

- Received vs. Closed Today by Hour
- Received vs. Closed Yesterday by Hour
- Received vs. Closed This Week by Day
- Received vs. Closed Last Week by Day
- Received vs. Closed This Month by Week
- Received vs. Closed Last Month by Week
- Received vs. Closed This Year by Month
- Received vs. Closed Last Year by Month

Service Level Reporting

Management reports can be generated to gauge how well service levels are being met.

NOTE
Service Level Reporting is affected by the pending statuses specified when creating the service level. Events that occur and time spent in a pending status is excluded from service level reports. For detains on specifying pending statuses, refer to Creating the Service Level Field. To display the list of pending statuses, select Administration | Workspace from the FootPrints Toolbar and then select Service Level Management from the Automated Workflow section of the main frame. Next, click the Edit button of the Pending Statuses List in the main frame of the Service Level Management Administration page. The Pending Statuses page is displayed. All of the statuses defined as "pending" are displayed in the Selected Statuses field.

To run a Service Level report:

1. Select Reports | Metrics from the **FootPrints** Toolbar and choose the Service Level Agreements metric report in Step 1, then click **GO**. If this option is not available, you may not have permission to run this report type or service levels are not enabled in this workspace.

2. Select the output type under Report Formatting:
   - **HTML**—Display report as HTML in a browser window.
   - **Export**—If you chose to output the report to a text file, select a file format in which to output the report. Format choices are MS Excel (i.e., comma separated file), tab delimited file, or a custom separator of your choice in a text file.
3. On the next page, in the first part of Step 3, select the date range on which to report in the Report on Issues Submitted fields.
   - **Exact**—Specify exact dates to search on in the period specified. Enter the date or dates to search on. Click to display a searchable calendar.
     - **On**—Specify a particular date (leave second date blank).

NOTE

When "on" a single date is chosen, and you are reporting by month, the report contains Issues for the month that date is in. If "on" a single date is chosen, and you are reporting by week, the report contains Issues for the week the date is in.

   -
     - **Before**—Issues that were created/last edited before the date entered are returned (leave second date blank).
     - **After**—Issues that were created/edited after the date entered are returned (leave second date blank).
     - **Between**—Returns Issues created/last edited between the dates specified (use both date fields).
   - **Relative**—Searches by relative date, allowing you to create a search or report that returns Issues, for example, for the last month. Select a number from the first drop-down (1-31) and select the period from the second drop-down (Day, Week, Month, or Year).
   - **Range**—Select this to search by a particular time period, e.g., yesterday, last Sunday, etc.
4. For Select SLA Time to report on, choose between whether to report on Issues according to SLA Due Date (the resolution time defined for this service level) or SLA Response Time (the amount of time allowed for Issue response for a service level).
5. Select the earliest status accepted for Issues to be considered as having met the service level. For example, if your organization considers Issues to have met their service level only when the Issue is closed, select Closed. But if your organization considers Issues to have met their service level if they have been responded to within the resolution time frame, and you have a status of Responded, select that status instead.
6. Select fields, which will be used to break down the Issues in the list further according to the selected fields.
7. Click **GO**. The report output is displayed in a separate window.

The report includes the following statistics for each service level:

- **Achieved**—The number of Issues and the percentage of the total that met the service level resolution time.
- **Breached**—The number of Issues and the percentage of the total that did not meet the service level resolution time.

  Breached is broken down into two additional categories:
  - **Resolved**—The number of Issues and the percentage of the total that were eventually resolved.

   - **Unresolved**—The number of Issues and the percentage of the total that were never resolved.
- **Neither**—The number of Issues and the percentage of the total that have neither achieved nor breached their service targets, as they have not yet reached their due date/time.
- **Total**—The total number of Issues for that service level in the time period specified.

First Call Resolution

First Call Resolution reports determine the percentage of issues that were created with a status of Closed versus the number of issues that were received during a specified time period.

NOTE
This excludes Issues that were first created by customers directly as Requests and then put in the Closed status by an Agent.

The options for report output are:

- **HTML**—Display report as HTML in a browser window.
- **Graphical**—Create chart images (JPEG files) that can be printed or saved to disk and imported into another program.
- **Export**—Create a text file which can be read by spreadsheets and other programs.

The following options are available:

- **Report by**—Specify the time period by which to group Issues. Options include Month, Week, and Day received.
- **Time Period**—Define the date range for searching.
   - **Exact**—Specify exact dates to search on in the period specified. Enter the date or dates to search on. Click  to display a searchable calendar.
      - **On**—Specify a particular date (leave second date blank).

NOTE
When "on" a single date is chosen, and you are reporting by month, the report contains Issues for the month that date is in. If "on" a single date is chosen, and you are reporting by week, the report contains Issues for the week the date is in.

      - **Before**—Issues that were created/last edited before the date entered are returned (leave second date blank).
      - **After**—Issues that were created/edited after the date entered are returned (leave second date blank).
      - **Between**—Returns Issues created/last edited between the dates specified (use both date fields).
   - **Relative**—Searches by relative date, allowing you to create a search or report that returns Issues, for example, for the last month. Select a number from the first drop-down (1-31) and select the period from the second drop-down (Day, Week, Month, or Year).
   - **Range**—Select this to search by a particular time period, e.g., yesterday, last Sunday, etc.
- **Show First Call Resolution Rate out of**

- **Issues Received**—The percentage of calls resolved immediately based on the total number of calls received for the time period
  or
- **Issues Received and now Resolved**—The percentage of calls resolved immediately based on the total number of calls received and resolved.

Resolution Rate

Resolution Rate reports determine the rate at which Issues are resolved based on specific criteria.

The options for report output are:

- **HTML**—Display report as HTML in a browser window.
- **Graphical**—Create chart images (JPEG files) that can be printed or saved to disk and imported into another program.
- **Export**—Create a text file which can be read by spreadsheets and other programs.

The options for creating Resolution Rate reports are:

- **Report by**—Specify either the time period by which to group issues, or report by Assignees
- **Time Period**—Define the date range for searching
  - **Exact**—Specify exact dates to search on in the period specified. Enter the date or dates to search on. Click  to display a searchable calendar.
    - **On**—Specify a particular date (leave second date blank).

NOTE

When "on" a single date is chosen, and you are reporting by month, the report contains Issues for the month that date is in. If "on" a single date is chosen, and you are reporting by week, the report contains Issues for the week the date is in.

    - **Before**—Issues that were created/last edited before the specified date are returned (leave second date blank).
    - **After**—Issues that were created/edited after the specified date are returned (leave second date blank).
    - **Between**—Returns Issues created/last edited between the dates specified (use both date fields).
  - **Relative**—Searches by relative date, allowing you to create a search or report that returns Issues, for example, for the last month. Select a number from the first drop-down (1-31), and select the period from the second drop-down (Day, Week, Month, or Year).
  - **Range**—Select this to search by a particular time period, e.g., yesterday, last Sunday, etc.
- **Cycle Time**
  - **30-60-90 Day**—Break down Issues resolved in less than 30 days, 30-60 days, 60–90 days, etc.
  - **7-Day Cycle Time**—Break down Issues resolved in less than 1 day, 1-7 days, 8-14 days, etc.
  - **Hourly/Daily**—Break down Issues resolved by hour.
  - **Hourly/Daily (Work Calendar)**—If a Workspace Work Calendar is defined, break down Issues resolved by hour within working hours.

Turn-around Time

Turn-around Time reports allow you to measure how long Issues have remained in a particular status or how long it takes to get from one status to another.

The options for report output are:

- **HTML**—Display report as HTML in a browser window.
- **Graphical**—Create chart images (JPEG files) that can be printed or saved to disk and imported into another program.
- **Export**—Create a text file which can be read by spreadsheets and other programs.

The reports available are:

- **Average Time Spent in a Particular Status**
- **Average Time to from Status A to Status B**
- **Average Time Spent in Each Status**

For each Turn-around Time report, you can chose to report by:

- **Agent**
- **Team**—Note that this option appears only if teams have been defined for your Workspace.
- **Time Period**

After you have selected one of the Turn-around Time reports and specified which information to gather, click **GO**.

Different options are available for these reports. The options are explained below for each type of Turn-around Time report.

Average Time Spent in a Particular Status

- **Status**—Select the status to report on.
- **Use Work Schedule in Time Calculations**—Check this box if you want to include only time spent during regular work hours, as defined in the Workspace Work Schedule.
- **Include Issues**—Define the date range for searching:
  - **Created or Edited**—Specify exact dates to search on in the specified period. Enter the date or dates to search on. Click  to display a searchable calendar.
    - **On**—Specify a particular date (leave second date blank).

NOTE

When "on" a single date is chosen, and you are reporting by month, the report contains Issues for the month that date is in. If "on" a single date is chosen, and you are reporting by week, the report contains Issues for the week the date is in.

    - **Before**—Issues that were created/last edited before the specified date are returned (leave second date blank).
    - **After**—Issues that were created/edited after the specified date are returned (leave second date blank).
    - **Between**—Returns Issues created/last edited between the specified dates (use both date fields).
  - **Relative**—Select this to search by relative date, allowing you to create a search or report, for example, that returns Issues for the last month. Select a number from the

first drop-down (1-31) and select the period from the second drop-down (Day, Week, Month, or Year).

- Range—Select this to search by a particular time period, e.g., yesterday, last Sunday, etc.

Average Time to go from Status A to Status B

- Starting Status—Select the starting status.
- Ending Status—Select the ending status.
- Use Work Schedule in Time Calculations—Check this box if you want to include only time spent during regular work hours, as defined in the Workspace Work Schedule.
- Include Issues—Define the date range for searching:
  - Created or Edited—Specify exact dates to search on in the period specified:
    - On—Specify a particular date (leave second date blank).

NOTE

When "on" a single date is chosen, and you are reporting by month, the report contains Issues for the month that date is in. If "on" a single date is chosen, and you are reporting by week, the report contains Issues for the week the date is in.

- Before—Issues that were created/last edited before the specified date are returned (leave second date blank).
- After—Issues that were created/edited after the specified date are returned (leave second date blank).
- Between—Returns Issues created/last edited between the specified dates (use both date fields).

- Dates—Enter the date or dates to search on. Click  to display a searchable calendar.
- Relative—Select this to search by relative date, allowing you to create a search or report, for example, that returns Issues for the last month. Select a number from the first drop-down (1-31) and select the period from the second drop-down (Day, Week, Month, or Year).

Average Time Spent in Each Status

- Use Work Schedule in Time Calculations—Check this box if you want to include only time spent during regular work hours, as defined in the Workspace Work Schedule.
- Include Issues—Define the date range for searching:
  - Created or Edited—Specify exact dates to search on in the period specified:
    - On—Specify a particular date (leave second date blank).

NOTE

When "on" a single date is chosen, and you are reporting by month, the report contains Issues for the month that date is in. If "on" a single date is chosen, and you are reporting by week, the report contains Issues for the week the date is in.

- Before—Issues that were created/last edited before the specified date are returned (leave second date blank).
- After—Issues that were created/edited after the specified date are returned (leave second date blank).

  - o **Between**—Returns Issues created/last edited between the specified dates (use both date fields).
- **Dates**—Enter the date or dates to search on. Click to display a searchable calendar.
- **Relative**—Select this to search by relative date, allowing you to create a search or report, for example, that returns Issues for the last month. Select a number from the first drop-down (1-31) and select the period from the second drop-down (Day, Week, Month, or Year).

Historical Reports and Snapshot

The historical reporting option returns historical data on Issues in the current Workspace, including past statuses, priorities, and elapsed time. For example, a report can return the average and total elapsed time it took a particular help desk technician to close Issues assigned to that technician in the month of May. The report includes a breakdown of all matching Issues and the total and average times for all Issues.

To use the historical report tool, select Reports | Metrics | Historical from the **FootPrints** Toolbar.

The options available in this report are:

- **Report Type**
  - **Historical Report**—Returns all Issues from a specified time period that also match the selected assignment, status, and priority criteria.
  - **Snapshot**—Returns a snapshot of all Issues created on a specified date that also match the selected assignment and priority criteria.
- **Report formatting**
  - **Output style**—Select whether to display the report in a browser window or output the data to a text file.
  - **File format**—If you chose to output the report to a text file, select a file format in which to output the report. Format choices are MS Excel (i.e., comma separated file), tab separated file, or a custom separator of your choice in a text file.
- **Report title**—Define what is included in the heading at the top of the report output. These options do not apply to the Text File style. Options include:
  - **Title**—Displayed at the top of the report. Enter the text you want included.
  - **Date**—The date the report is run (updates each time the report template is re-run).
  - **Time**—The time the report is run (updates each time the report template is re-run).
  - **Workspace name**—Name of the Workspace.
  - **Logo graphic**—The logo image displayed in the current Workspace.
- **Time Period**—Define the date range to search on.
  - **Exact**—Specify exact dates to search on in the period specified:
    - o **On**—Specify a particular date (leave second date blank).
    - o **Before**—Issues that were created/last edited before the specified date are returned (leave second date blank).
    - o **After**—Issues that were created/edited after the specified date are returned (leave second date blank).
    - o **Between**—Returns Issues created/last edited between the specified dates (use both date fields).

- **Dates** - Enter the date or dates to search on. Click to display a searchable calendar.
- **Relative**—Select this to search by relative date, allowing you to create a search or report, for example, that returns Issues for the last month. Select a number from the first drop-down (1-31) and select the period from the second drop-down (Day, Week, Month, or Year).

- **Starting status in this time period**—Choose the starting status that the Issue should have in the date range specified.
- **Ending status in this time period**—Choose the ending status that the Issue should have in the date range specified.
- **Use Work Calendar in computing Time Elapsed between Starting Status and Ending Status**—When this box is checked, don't include time outside of the workspace work schedule when calculating the time in which an Issue was between its starting and ending statuses.
- **Assignees**—Select the user(s) to search on. Hold down the CTRL key to highlight multiple users.
- **Additional FootPrints IDs**—Additional user IDs of users who do not appear in the Assignees list can be entered, each separated by a space. This is useful for searching on users who no longer belong to the Workspace.
- **Priority**—Choose the priority Issues should have in the date range specified.

After choosing the report criteria, click **GO**. A second window displays the report results. If the text file option is chosen, a Windows Save As dialog box is displayed. Matching Issues, including Issue number, starting and ending dates and times, elapsed time, status and priority are displayed. At the end of the report, the total number of records returned, total elapsed time, and average elapsed time are displayed.

NOTE ON PERMISSIONS
Reports can be restricted based on a user's Role. Historical reports may not be available if your role does not allow access. Please consult your **FootPrints** administrator for more information.

Query Statistics

The query logging feature records queries that have been placed in the Simple Search field, the date and time at which each query was made, and whether the query came from a customer or an Agent. The query statistics report performs counts on those queries based on specified criteria. To access the query statistics reports, select Reports | Metrics, then select Query statistics from the Step1: Choose Report Type drop-down in the main frame. A Query Statistics report cannot be saved or autorun. Click the **GO** button when you are ready. This displays the criteria options.

Options for the query statistics reports are as follows:

- **Date Selection Section**—Define the date range for searching. The current date's data is never available in the report. This is because the data is not entered until the day is over.
  - **Exact**—Specify exact dates to search on in the period specified. Enter the date or dates to search on. Click to display a searchable calendar.

On—Specify a particular date (leave second date blank).

NOTE
When "on" a single date is chosen, and you are reporting by month, the report contains Issues for the month that date is in. If "on" a single date is chosen, and you are reporting by week, the report contains Issues for the week the date is in.

  - o **Before**—Issues that were created/last edited before the date entered are returned (leave second date blank).
  - o **After**—Issues that were created/edited after the date entered are returned (leave second date blank).
  - o **Between**—Returns Issues created/last edited between the dates specified (use both date fields).
- ▪ **Relative**—Searches by relative date, allowing you to create a search or report that returns Issues, for example, for the last month. Select a number from the first drop-down (1-31) and select the period from the second drop-down (Day, Week, Month, or Year).
- ▪ **Range**—Select this to search by a particular time period, e.g., yesterday, last Sunday, etc.

- **Other options**—Define other reporting criteria.
  - ▪ **Queries by**—Process queries from customers, Agents, or both customers and Agents.
  - ▪ **Sort and Count by**—Sort and count the queries according to keywords occurrences or according to the entire line of the Simple Searches.
  - ▪ **Ignore words shorter than 4 characters for keyword sort**—If you chose to count and sort by keyword, choose Yes to leave words shorter than 4 characters in length out of the sort or No to include words shorter than 4 characters in the count.
  - ▪ **Exclusion List**—The exclusion list is a list of words that you can exclude from the report.
    - o Ignore words in the exclusion list—Select Yes to leave words in the exclusion list out of the report. If you select No, the words in the exclusion list are included in the report.
    - o **Review/Edit Exclusion List**—This link enables you to enter words in the exclusion list or to review the list. Administrators can edit the list. Users without administrator privileges cannot edit the list. To edit the list, click the link, type the word in the box with just one word permitted per line, and then click the **GO** button.

When you finish selecting options, click there **GO** button to generate the report.

Understanding the Query Report

Query statistics are intended to demonstrate which queries are repeated frequently and, therefore, can be used as a basis for product design. If a question keeps coming up time and again, the query statistics will show that repetition and, therefore, provide a pointer to a solution.

For example, if the query logs show that customers frequently want to know the meaning of an acronym that is used as a label on the GUI, you may want to use the full name in the GUI or use a more meaningful name to eliminate the questions. Questions that show Agents do not understand some function or other may require a change to Agent training.

When you read the report, you should be aware that the totals will differ depending on whether you count and sort by keyword or by entire line. If you count and sort by the entire line, then the number of queries processed will equal the number of instances found. If you count and sort by keyword, the number of queries processed will not necessarily match the number of word instances found in those queries.

Saved Metric Reports

Saved metric reports are available to individual users based on their role privileges. Saved metric reports can be Auto Run.

Flashboard

The **FootPrints** Flashboard feature displays customizable, up-to-the-minute graphical reports of help desk and Workspace activity. There are two types of Flashboard. The Workspace Flashboard is only available to Workspace and System Administrators and reflects activity for the current Workspace. The Personal Flashboard is available to any Agent and reflects the individual's activity and the activity of Teams to which the Agent belongs for the current Workspace.

Personal Flashboard

The **FootPrints** Flashboard feature displays customizable, up-to-the-minute graphical reports of help desk and Workspace activity. There are two types of Flashboard. The Workspace Flashboard is only available to Workspace and System Administrators and reflects activity for the current Workspace. The Personal Flashboard is available to any Agent and reflects the individual's activity and the activity of Teams to which the Agent belongs for the current Workspace.

To access the Personal Flashboard, select More | Personal Flashboard from the **FootPrints** Toolbar. The first time the Personal Flashboard window opens, it displays a bar chart of Issues Received vs. Closed last 12 hours and basic statistics about the total number of calls received that day and the calls that are still active as pertain to that Agent. You can optionally choose other statistics and charts.

There are several options from the main Flashboard window:

- **Customize**—You can include additional reports and statistics in the Personal Flashboard window and change the format of some of the graphs from bar charts to pie charts. Refer to *Customizing the Flashboard* for detailed information.
- **Refresh**—Although the Personal Flashboard window refreshes every five minutes, you can refresh the window at any time by selecting this option.
- **Print**—The contents of the Personal Flashboard window are printed.
- **Help**—Calls the online help.
- **Close**—Close the Personal Flashboard.

Customizing the Flashboard

The Personal Flashboard can be customized to include specific charts or metrics. To customize the Personal Flashboard, select **Customize** in the Personal Flashboard window. A new window opens with a list of metrics that can be included or excluded by selecting the corresponding checkboxes. The Received vs. Closed charts are displayed as bar charts; the Active Issue charts allow you to choose between bar or pie chart format. In addition, you can display charts for up to four custom Workspace fields that have been defined as drop-down display fields.

Defining Statistical Flashboard Information

Statistical Flashboard information is displayed in scoreboards. The following statistics can be displayed in the Flashboard:

- **Received Today Statistics for Me and My Teams**—Check the box in the Show column next to the statistics you want to include from the following list:
  - **Total Issues**—Total number of Issues received today. Checked by default.
  - **Active Issues**—Of the Issues received today, the number that are still active. Checked by default.

- **1st Call Resolution**—Of the Issues created by the Agent or the Agent's Team today (i.e. received via phone), the percentage that were resolved on first contact (i.e. created in the "Closed" status).

NOTE

This statistic does not include Issues submitted by customers via web or email, as by definition those Issues cannot be created as closed.

- **Average Time to Close**—Of the Issues that were received and closed by the Agent or the Agent's Team today, the average elapsed time it took for them to close.
- **Average Time Spent**—Of the Issues received by the Agent or the Agent's Team today, the average time spent on them by Agents (using the Time Tracking feature).

Defining Graphical Flashboard Information

Received vs. Closed graphical information is displayed as bar charts. To include the charts in the Flashboard, select from one or more of the following by clicking the box in the Show column:

- **Received vs Closed last 12 hours**—A bar chart of Issues received vs. Issues closed over the last 12 hours broken down by hour.
- **Received vs Closed last 24 hours**—A bar chart of Issues received vs. Issues closed over the last 24 hours broken down by hour.
- **Received vs Closed this week**—A bar chart of Issues received vs. Issues closed over the last week broken down by day.
- **Received vs Closed last week**—A bar chart of Issues received vs. Issues closed during the previous week broken down by day.
- **Received vs Closed this month by week**—A bar chart of Issues received vs. Issues closed over the last week broken down by week.
- **Received vs Closed last month by week**—A bar chart of Issues received vs. Issues closed during the previous month broken down by week.

Active Issue information can be displayed as either bar or pie charts by selecting either pie or bar from the drop-down selection box in the Style column. Choose one or more of the following to display in the Flashboard by clicking the box in the Show column:

- **Active Issues by Status**—A bar or pie chart that shows number of active Issues in the Workspace broken down by status.
- **Active Issues by Team (My Teams)**—A bar or pie chart that shows number of active Issues broken down by the Agent's Teams.
- **Active Issues by Custom Field**—A bar or pie chart that shows number of active Issues broken down by any drop-down field (Problem Type, Department, etc.) Up to four fields can be selected.
- **Save Current Window Size**—If checked, the current size of the Flashboard window is saved for the future.

When you have finished customizing your Flashboard, you can save the changes just for this Flashboard display or as your default settings:

- **Apply**—Apply these settings for this time only.
- **Save**—Save these settings as your default.

Cross Workspace Reporting

Each **FootPrints** Workspace is contained in a separate sub-database. Each Workspace has its own fields, users, and other options. You may be a member of one Workspace or you could have membership in several Workspaces. If you are a member of two or more Workspaces, and your Role allows it, it is possible to create a report that includes data from multiple Workspaces.

Create a Cross Workspace Report

1. Select Report | Cross Workspace from the FootPrints Toolbar.
2. Included Workspaces—Highlight the Workspaces to be included in the report. Hold down the CTRL key to select multiple Workspaces. Click GO.
3. Refer to the section on Custom Reports (earlier in this document) for details on completing the remaining tabs.
4. When you are finished customizing the report, click GO .
5. The results of the report are displayed in a new browser window, specifying the Workspace for each Issue.

NOTE ON PERMISSIONS

Reports can be restricted based on a user's Role. Cross-Workspace reports may not be available if your role does not allow access. Please consult your **FootPrints** administrator for more information.

NOTE

Cross-workspace reports do not work for a person who is an Agent in one Workspace and a customer in another. If an Agent creates a Cross-workspace report, the results do not contain Issues from the Workspace in which the Agent is a customer.

Time Tracking Reports

FootPrints can track the time spent by internal users working on Issues. Only data from Issues that contain Time Tracking data are included in the report. Reports can be used to assess how your team's resources are being allocated, to justify staff changes, and to produce time tracking and billing information for charge-backs and customer billing. To generate meaningful Time Tracking and billing rates options should be configured by the Workspace Administrator.

Other topics in this section:

- Create a Time Tracking Report
- Saved Time Tracking Reports

Create a Time Tracking Report

1. Select Reports | Time Tracking from the FootPrints Toolbar.
2. Complete the tabs as described earlier in this document under Custom Reports. There are, however, some items that are specific to the Time Tracking Report, such as the Time Tracking tab.
   a. Formatting—Time Tracking reports contain built-in data, including Issue Number, Title, Time Spent, Billing Amount, etc. Additional fields can also be included. These fields are displayed one to a line in the order selected. The History field is a special field that includes the Issue history in the report. This provides an audit trail in reporting. Also select the format for text file output. This only applies to Text File style. Choices are comma-delimited file (.csv), tab delimited (.tsv), or your custom delimited (.txt).

b. Time Tracking Tab

- Users—Select users and teams whose Time Tracking data goes into the report. Hold down the CTRL key to highlight multiple users or teams. Select the Flat radio button to display a flat list of the names of Agents. Select the Group By Team radio button to list the teams. Click the plus sign to expand a team list and display individual team member names.
- Time Tracked— Restrict report to a certain date range. If this is left blank, all time-tracking data for the current Workspace is included.

3. On the Save/Run tab, enter a name for the report to save it. Each time a saved report template is run, it returns the latest matching data. Click GO to run the report.

NOTE

Saving the report here only saves the report formatting options and criteria chosen in this form, not the results of the report. This feature can be used to run the same report in the future. For example, you could set the report to be run once a week. Each time the report is run, it returns the latest data from the current Workspace. Saving report output is covered in *Saving and Printing Report Data*.

NOTE ON PERMISSIONS

Reports can be restricted based on a user's Role. Time Tracking reports may not be available, or some options may not appear, if your role does not allow access. Please consult your **FootPrints** administrator for more information.

FootPrints' Time Tracking report returns totals and averages of all time tracking data included in the report and individual time-tracking information for each Issue on which it reports. In addition to returning specific data for billing purposes, the Time Tracking report can return averages and totals for a specific internal user, customer, status or priority type, etc.

NOTE

Average times on Time Tracking reports are in decimal hours, not hours and minutes. For example, an average of "1.25" means 1 hour and 15 minutes.

In addition, if time tracking comments are enabled in this Workspace, they are automatically included in the Time Tracking report.

Saved Time Tracking Reports

Time Tracking reports can be saved as templates. Each time a saved report template is run, it returns the latest matching data. These reports can be run from the web interface or scheduled to be run and emailed automatically. Administrators can refer to *Auto Run Reports* in the **Numara FootPrints Reference Manual** for more information on how to run and email reports automatically.

Access a Saved Time Tracking Report

1. Select Reports | My Reports from the **FootPrints** Toolbar. Saved Time Tracking Reports are listed in a drop-down.
2. Select the report from the drop-down.
3. Click the Run radio button to run the report (this is the default), the Edit radio button to edit the report, or the Delete radio button to delete the report.
4. Click the GO button.
5. If you selected Edit, change values as needed, then save and run the report. If you selected Run, the report is run and displayed. If you selected Delete, the report is deleted. Deleting a Time Tracking report deletes the report for all users.

NOTE

Saving the report here only saves the report formatting options and criteria chosen in this form, not the results of the report. This feature can be used to run the same report in the future. For example, you could set the report to be run once a week. Each time the report is run, it returns the latest data from the current Workspace. Saving report output is covered in *Saving and Printing Report Data*.

Change Management Reports

Change management reports return data about Issues that match the Change Management criteria. Change management reports are available to you with appropriate permissions. Only Issues that are part of a Change Management workflow are included in the Change Management Reports. The report can include:

- Any or all fields from the Issues
- Voting history, including individual votes and final decisions for the Issue
- The Change Management criteria, i.e., the criteria used to place an Issue into the Change Management process
- Links to the Issues
- Other data that you choose when configuring the report.

The information returned by these reports can help you determine how well your Change Management process is performing, whether approvers are voting on Issues in a timely manner, which approvers are not responding in a timely manner or at all, and so on.

Obviously, to generate meaningful Change Management reports, you must have the Change Management add-on module installed and Change Management processes and phases configured.

Users should be aware that they cannot necessarily see Change Management Issues that they have approved or that are awaiting their approval unless they are also assigned to the Issue. This is because what is seen in a Change Management report is governed by one set of role permissions, but permission to run the reports may be governed by a different role permission.

Creating a Change Management Report

To create a Change Management Report:

1. Select Reports | Change Management from the FootPrints Toolbar.
2. Heading—Define what is included in the heading at the top of the report output. They do not apply to the Text File style. Options include:
   - Title—This is displayed at the top of the report.
   - Date—The date the report is run (updates each time the report template is re-run).
   - Time—The time the report is run (updates each time the report template is re-run).
   - Workspace name—Name of the Workspace.
   - Logo graphic—Logo image displayed in the current Workspace.
3. Formatting—Change Management reports contain built-in data, including Issue Number, Title, etc. Additional fields can also be included. These fields are displayed one to a line in the order selected. The History field is a special field that includes the Issue history in the report. This provides an audit trail in reporting.

- **Fields Displayed**—Change management reports can contain any field data from change management Issues. These fields are displayed one to a line in the order selected.
  - **Select fields to display**—Use the radio buttons to select which field types to display: choose from FootPrints, Issue Information, or Contact Information fields. From each set of fields, select the fields to be displayed in the report by clicking on the field name in the list on the left and then clicking the Add Field button. The History field is a special field that includes the Issue history in the report. This provides an audit trail in reporting.
  - **Descriptions included**—If the Description field data is to be included, the report may become too large due to the size of the Description data. You can use the radio button to determine whether all of the Descriptions for each Issue are included, or only the original, newest, two most recent, or three most recent Description entries are included in the report.
  - **Description and multi-line field wrapping**—Choose whether the Description entries are not wrapped (Don't Wrap) or set the length of the lines for wrapping.
  - **Display complete voting history in report**—Check this box to display the complete voting history of every Issue. This includes the names of the voters and which way they voted.
  - **Sort Results by**—Order the Issues returned by the specified field, descending (most recent or highest first) or ascending (oldest or lowest first). By default, Issues returned are ordered by Issue number descending. Select a primary and secondary sorting order. In instances where the primary sorting fields are identical, results are sorted on the secondary field.

4. **Change Management Criteria**—Select the criteria to be used to determine whether an Issue is included in the report.
   - **Issue must have been in one of the below phases**—Highlight the phases to be included in the report. Only Issues that are or have been in the selected phases are included.
   - **Phase is currently in one of the below approval states**—Highlight the statuses to be included in the report. Only Issues that are in the selected statuses are included.
   - **Last voted (or started if no votes)**—Enter a date. Only Issues that were either last voted on. or were created but not yet voted on, during the specified period are included.
   - **Include only Issues with votes (on the selected phases) by any of the below users**—Highlight the user names. Only Issues voted on by the specified users are included. Select the appropriate radio button to determine whether results are for individuals (Flat) or grouped by team (Team).
5. **Select Report Criteria**—Specify the criteria for including Issues in the change management report. Only Issues matching the characteristics specified here are included. Built-in fields and Issue-specific fields are included on this page.
   - **Title**—Enter a word or phrase to for which to search. Boolean operators AND, OR, and NODATA are supported. Boolean Operators
   - **Description**—If a word or phrase is entered (or multiple words using Boolean Operators), only Issues containing that word/phrase in the Description are returned.
   - **Keyword**—If a word or phrase is entered, any Issues containing that word/phrase in any field are returned, including Title, Description, Workspace fields, and Address Book fields, as long as the full text search conforms to full text keyword search behavior.

- **File Attachments**—Search for file attachments by name (not by content). Available in all versions except the **FootPrints** database.
- **Assigned to**—Highlight one or more users to returns Issues assigned to the user(s) selected, holding down the CTRL key to select multiple users. If you do not want to limit the search to any particular assignees, do not highlight any users. Advanced controls are also available for this field.

NOTE ON PERMISSIONS

Access to Issues is based on a user's role. Assignment options may be restricted based on your role. Please consult your **FootPrints** administrator for more information.

- **Submitted by**—If a user is selected, the search returns only Issues created by that user.
- **Priority**—Returns only Issues of the specified priority or priorities. Highlight the priorities to be included; hold down the CTRL key to highlight multiple priorities. To return all priorities, no priorities need to be selected (this has the same result as selecting all priorities).
- **Status**—Returns only Issues of the specified status(es). By default, Open and any custom statuses are highlighted in the status dialog. To select multiple statuses, hold down the CTRL key.
- **Issue Information**—The fields in this section differ depending on the fields in the current Workspace. Search on as many fields as desired. Search methods vary with the field data types:
    - **Character field**—Displays a text box. Enter the word or phrase to search on (or multiple words using Boolean Operators).
    - **Number field**—Displays a text box. Enter the number or part of a number for which to search.
    - **Drop-down and Multi-select field**—Displays a multi-select dialog box. Highlight one or more values to search on. To search for Issues that contain no data for the field, select No data. If you do not want to restrict the search based on choices in a field, do not highlight any values.
    - **Date fields**—Search on a date or date range.

NOTE

Date/time fields can only be searched by date, not time.

    - **Other field types**—Email, URL, and FTP fields display a text box. Enter the word or phrase to search on (including partial addresses).

6. **Contact Criteria**—Search by users' contact information. The fields in this section differ depending on the fields in current Address Book. Search methods are the same as those for Issue Information fields (see above).
7. **Advanced Criteria**—Various criteria for determining which Issues are searched and other criteria.
    - **Issue Types to Include**—Specify whether Advanced Issue types, including Subtasks and Global Issues, are returned. Options include:
        - **All Issue Types**—All Issue types are returned.
        - **Regular Issues**—Regular (non-Global or Master/Subtask) Issues are returned.
        - **Include Master Issue**s—Master Issues that contain subtasks are returned.
        - **Include Subtasks**—Subtasks of Master Issues are returned.
        - **Include Global Issues**—Global Issues are returned.

  - **Include GlobalLinks**—All users' Issues linked to a Global Issue are returned.
- **Date**—If dates are specified, the search returns only Issues from the time period specified.
- **Age**—Returns Issues created in the time specified. Number of days and hours can be specified. Modifiers are also provided, including "Greater Than", "Less Than", "Equal to", "Greater than or Equal to", "Less than or Equal to", and "Not Equal to". As an example, to return Issues greater than 1 day old, choose "Greater than" and fill in "1" for "Days".

NOTE

Age is always 24/7 and does not use the Workspace Work Calendar.

- **Include only Issue Numbers**—Restricts the report to a defined range of Issue numbers.
- **Advanced Date/Time Controls**—The following "Pending Clock" options apply to the "Time to Close" and "Age" calculations (available for Reports only):
  - **Don't include time outside of the Workspace Work Calendar**—If this is checked, the calculations do not include after-hours time based on the work calendar for the workspace.
  - **Don't include time Issues spent in the following Statuses**—Select one more statuses (Pending, Waiting for Customer, etc.) to exclude time spent for the "Time to Close" and "Age" calculations.

NOTE

These time calculations are always based on the time zone in which the server resides.

8. **Save/Run Report**— Save the report criteria as a queue. Note that this does not save the report results when you run the report, but just the criteria used. The report criteria can then be re-used to run reports at various times or to auto-run reports. Saved report queues appear in the Display Drop-down on the homepage. Click **GO** to run the report.

Saved Change Management Reports

Change management reports can be saved as templates. Each time a saved report template is run, it returns the latest matching data. These reports can be run from the web interface or scheduled to be run and emailed automatically. Administrators can refer to *Auto Run Reports* in the **Numara FootPrints Reference Manual** for more information on how to run and email reports automatically.

Access a Saved Change Management Report

1. Select Reports **|** My Reports from the **FootPrints** Toolbar. Saved Change Management Reports are listed in a drop-down.
2. Select the report from the drop-down.
3. Click the Run radio button to run the report (this is the default), the Edit radio button to edit the report, or the Delete radio button to delete the report.
4. Click the GO button.
5. If you selected Edit, change values as needed, then save and run the report. If you selected Run, the report is run and displayed. If you selected Delete, the report is deleted. Deleting a Time Tracking report deletes the report for all users.

NOTE

Saving the report here only saves the report formatting options and criteria chosen in this form, not the results of the report. This feature can be used to run the same report in the future. For example, you could set the report to be run once a week. Each time the report is run, it returns the latest data from the current Workspace. Saving report output is covered in *Saving and Printing Report Data*.

Report Templates

The Workspace Administrator can create Single Issue report templates for printing out Purchase Orders, Work Orders, Return Merchandise Authorization forms (RMA), etc. These templates are available when reporting on issues from the homepage and from the Details page of an issue. Please refer to the **Numara FootPrints Reference Manual** for more information.

Knowledge Base Reports

Knowledge Base reports provide data and statistics on Knowledge Base usage. These are built-in reports for which you select criteria. Knowledge Base reports return data on internal and public solutions.

Statistics Reports

There are three types of Statistics report:

- **Activity Reports**—Activity reports return customer and agent votes on the usefulness and accuracy of Knowledge Base solutions. Results are show responses to the question fo whether the solution was useful. Responses are Yes, Yes, but Inaccurate, and No.
- **Outcome**—Outcome reports show the creators of solutions, how often the solutions were edited by them or others, and the number of times the solutions were used by them or others. This gives you an idea of how often solutions need to be updated or corrected once they have been created and how much they are being used.
- **Trends**—Trend reports show the number of solutions created by agent and by team, the number of solutions created by agent and by team, and the votes on accuracy of solutions by agent and by team.

Running a Statistics Report

To run a Statistics Report:

1. Select Reports | Knowledge Base from the **FootPrints** Toolbar.
2. Select Statistics from the drop-down field, then click GO.
3. Select the type of output for the report.
   - **HTML**—The results will be displayed in a browser window after they have been generated.
   - **Export**—Results will be displayed in a file that can be saved. If you select Export, the next step will require that you specify the type of file into which the data is to be exported. Options are MS Excel (a comma-separated file with a .csv extension), Tab delimited (a file with tabs separating the fields and a .tsv extension), or Custom (you must select your own field separator and the file will be saved with a .txt extension).
4. Click GO after you've made your selection (or selections, if you chose Export).
5. Choose from the following options:

- **Choose a Report**—Pick the type of report to return: Activity, Outcome, or Trends.
  - **Activity Reports**—Activity reports return customer and agent votes on the usefulness and accuracy of Knowledge Base solutions. Results are show responses to the question of whether the solution was useful. Responses are "Yes", "Yes, but Inaccurate", and "No".
  - **Outcome**—Outcome reports show the creators of solutions, how often the solutions were edited by them or others, and the number of times the solutions were used by them or others. This gives you an idea of how often solutions need to be updated or corrected once they have been created and how much they are being used.
  - **Trends**—Trend reports show the number of solutions created by agent and by team, the number of solutions created by agent and by team, and the votes on accuracy of solutions by agent and by team.
- **Include all Solutions**—Define the date range for searching.
  - **Exact**—Specify exact dates to search on in the period specified. Enter the date or dates to search on. Click to display a searchable calendar.
    - **created**—Solutions that were created on, before, after or between (depending on the drop-down selection you make next) the specified date(s) are returned (leave second date blank for all but "between").
    - **last edited**—Solutions that were last edited on, before, after or between (depending on the drop-down selection you make next) the specified date(s) are returned (leave second date blank for all but "between").
    - **used**— Solutions that were used on, before, after or between (depending on the drop-down selection you make next) the specified date(s) are returned (leave second date blank for all but "between").

NOTE

When "on" a single date is chosen, and you are reporting by month, the report contains Solutions for the month that date is in. If "on" a single date is chosen, and you are reporting by week, the report contains Issues for the week the date is in.

  - **Relative**—Searches by relative date, allowing you to create a search or report that for example, returns Solutions for the last month. Select a number from the first drop-down (1-31), and select the period from the second drop-down (Day, Week, Month, or Year).
  - **Range**—Select this to search by a particular time period, e.g., yesterday, last Sunday, etc.

6. Click GO. The report is returned. If you elected to Export the file, you will be asked if you want to open or save the file.

Lifecycle Reports

Lifecycle reports return the amount of time a solution spent in a particular part of its lifecycle following creations. Types of lifecycle reports are:

- **Time Spent in a Particular Status**—The amount of time that the solution spent in a particular status. For example, the status might be "Pending", i.e., waiting for approval to be entered into the Knowledge Base.
- **Time to Go from Status A to Status B**—The amount of time a solution spent going from one status to another. For example, if your organization had several intermediate steps in the approval process but you wanted to know how long it took for solutions to be placed in the Knowledge Base after they were submitted to that process, this would tell you.

Status A, for example, might be "Submitted for KB" and Status B might be "Closed", but statuses "Pending Approval" and "Verified by Test" might be intermediary steps between "Submitted for KB" and "Closed".

- Time Spent in Each Status—Time Spent in a Particular Status returns the amount of time that solutions spent in a specified status. Time Spent in Each Status returns the amount of time that solutions spent in each of the statuses, so that all statuses are returned with data.

Running a Lifecyle Report

To run a Lifecycle Report:

1. Select Reports | Knowledge Base from the FootPrints Toolbar.
2. Select Lifecycle from the drop-down field, then click GO.
3. Select the type of output for the report.
   - HTML—The results will be displayed in a browser window after they have been generated.
   - Export—Results will be displayed in a file that can be saved. If you select Export, the next step will require that you specify the type of file into which the data is to be exported. Options are MS Excel (a comma-separated file with a .csv extension), Tab delimited (a file with tabs separating the fields and a .tsv extension), or Custom (you must select your own field separator and the file will be saved with a .txt extension).
4. Choose a report:
   - Time Spent in a Particular Status—The amount of time that the solution spent in a particular status. For example, the status might be "Pending", i.e., waiting for approval to be entered into the Knowledge Base.
   - Time to Go from Status A to Status B—The amount of time a solution spent going from one status to another. For example, if your organization had several intermediate steps in the approval process but you wanted to know how long it took for solutions to be placed in the Knowledge Base after they were submitted to that process, this would tell you. Status A, for example, might be "Submitted for KB" and Status B might be "Closed", but statuses "Pending Approval" and "Verified by Test" might be intermediary steps between "Submitted for KB" and "Closed".
   - Time Spent in Each Status—Time Spent in a Particular Status returns the amount of time that solutions spent in a specified status. Time Spent in Each Status returns the amount of time that solutions spent in each of the statuses, so that all statuses are returned with data.
5. Report by:
   - Average for Team—Averages the report data by team.
   - Average for Agent—Averages the report data by agent.
   - Average for Time Period—Averages the report data by the time period you specify.
6. Click GO.
7. The next page requires different information depending on which type of report you chose:
   - Time Spent in a Particular Status
     - Status—The status for which you want data.
     - Include Issues

- **Exact**—Specify exact dates to search on in the period specified. Enter the date or dates to search on. Click to display a searchable calendar.
  - **created**—Solutions that were created on, before, after or between (depending on the drop-down selection you make next) the specified date(s) are returned (leave second date blank for all but "between").
  - **last edited**—Solutions that were last edited on, before, after or between (depending on the drop-down selection you make next) the specified date(s) are returned (leave second date blank for all but "between").

NOTE

When "on" a single date is chosen, and you are reporting by month, the report contains Solutions for the month that date is in. If "on" a single date is chosen, and you are reporting by week, the report contains Issues for the week the date is in.

- **Relative**—Searches by relative date, allowing you to create a search or report that for example, returns Solutions for the last month. Select a number from the first drop-down (1-31), and select the period from the second drop-down (Day, Week, Month, or Year).
- Range—Select this to search by a particular time period, e.g., yesterday, last Sunday, etc.

- **Time to Go from Status A to Status B**
  - **Starting Status/Ending Status**—The starting status for which you want data. The data will be returned for solutions based on the time it took to go from the starting status to the ending status.
  - **Only Include Issues that Still Remain in the Ending Status**—Check this box if you only want data for solutions that are still in the ending status. Leave this box unchecked if you want to include all solutions that meet the criteria regardless of their current status.
  - **Include Issues**
    - **Exact**—Specify exact dates to search on in the period specified. Enter the date or dates to search on. Click to display a searchable calendar.
      - **created**—Solutions that were created on, before, after or between (depending on the drop-down selection you make next) the specified date(s) are returned (leave second date blank for all but "between").
      - **last edited**—Solutions that were last edited on, before, after or between (depending on the drop-down selection you make next) the specified date(s) are returned (leave second date blank for all but "between").

NOTE

When "on" a single date is chosen, and you are reporting by month, the report contains Solutions for the month that date is in. If "on" a single date is chosen, and you are reporting by week, the report contains Issues for the week the date is in.

- **Relative**—Searches by relative date, allowing you to create a search or report that for example, returns Solutions for the last month. Select a number from the first drop-down (1-31), and select the period from the second drop-down (Day, Week, Month, or Year).
- Range—Select this to search by a particular time period, e.g., yesterday, last Sunday, etc.

- **Time Spent in Each Status**—Data is returned for all solutions for all statuses.

- **Include Issues**
  - **Exact**—Specify exact dates to search on in the period specified. Enter the date or dates to search on. Click to display a searchable calendar.
    - **created**—Solutions that were created on, before, after or between (depending on the drop-down selection you make next) the specified date(s) are returned (leave second date blank for all but "between").
    - **last edited**—Solutions that were last edited on, before, after or between (depending on the drop-down selection you make next) the specified date(s) are returned (leave second date blank for all but "between").

NOTE

When "on" a single date is chosen, and you are reporting by month, the report contains Solutions for the month that date is in. If "on" a single date is chosen, and you are reporting by week, the report contains Issues for the week the date is in.

- **Relative**—Searches by relative date, allowing you to create a search or report that for example, returns Solutions for the last month. Select a number from the first drop-down (1-31), and select the period from the second drop-down (Day, Week, Month, or Year).
- **Range**—Select this to search by a particular time period, e.g., yesterday, last Sunday, etc.

Auto Run Reports

Saved reports can be scheduled to run automatically and to be sent automatically via email on specified days/times. This is a Workspace Administrator function. Please refer to the **Numara FootPrints Reference Manual** for more information.

Address Book

The Address Book is used for maintaining employee and/or external customer contact and other information. This information should be relatively permanent for your end users. For example, data kept in the Address Book may include Department, Name, User ID, Email address, Phone number, Service Level, etc. This feature allows Agents to quickly view the latest user contact data and look up the data right from the Issue form, saving time and keystrokes.

Topics in this chapter:

- Address Book Homepage
- Create a New Contact
- Working with Contacts
- Create a New Issue from the Address Book
- Address Book Searches and Reports
- Address Book Administration

Address Book Homepage

To view the Address Book, select **Address Book** from the **FootPrints** Toolbar→More menu. The Address Book is displayed in a separate browser window.

Address Book Toolbar

The Address Book (AB) has its own toolbar in the left frame, with the following buttons:

- **Home**—Displays the Address Book Homepage.
- **Create Contact**—Create a new contact.
- **Reports**—Report on contact data.
- **Administration**—Configure the Address Book (administrators only).

NOTE

You may see additional toolbar buttons if, for example, your FootPrints administrator has configured FootPrints to use the Master Contact Record feature. In that instance, you might see buttons for Company Home and Company Search. The list above is for the basic buttons on the toolbar.

Above the Address Book Toolbar

Several functions are located above the Address Book toolbar:

- Address Book Quick Search—To use Quick Search, enter the search string in the Quick Search field, select the field to search from the drop-down (using the drop-down arrow), and the click the SEARCH button. A list of all Issues that match your search criteria are displayed.
- Link to Advanced Search—The Advanced Search feature allows you to search the Address Book database on any combination of fields and advanced criteria. FootPrints automatically generates the Advanced Search form for each Address Book, with all of the custom and built-in fields for that Address Book included. For example, if a new field is added by the Address Book Administrator, the field is included automatically on the Advanced Search form. In the same way, if a field is deleted from the Address Book, it is removed from the Advanced Search page. To perform an Advanced Search, click Advanced below the Quick Search dialog. This form contains a combination of text fields, drop-down boxes, multi-select dialogs, and radio buttons which allow you to search on any combination of criteria. Each field acts as a filter. Only fill in or choose the criteria you want to search on. Any field that you do not want to perform a search on should remain untouched. Some Boolean operators can be used within in text fields.
- Close—Close the Address Book browser.
- Help—Open the complete online help.

Below the Address Book Toolbar

Immediately below the Address Book toolbar is an alphabetical index. Click on a letter to display all contacts whose search field (by default, this is Last Name) begins with that letter.

The Address Book contacts are listed below the toolbar.

- The contacts are sorted alphabetically on the first field. By default, this is Last Name,but any field can be set as the first field, such as Company, Department, User ID, etc.
- Clicking the hypertext link for a letter (A, B, C, etc.) brings you to the contacts for that letter.
- If the Address Book is either LDAP or Dynamic SQL-based, the Address Book Homepage contains a search window.

Create a New Address Book Contact

1. Click Create Contact on the Address Book Toolbar.
2. Fill in the fields (these can differ depending on how your administrator has customized FootPrints).
3. Click Save to submit the new contact information.

The new contact is included, in alphabetical order, in the Address Book. Contacts can also be created from the create Issue screen.

NOTE

When a new Address Book contact is created, the system checks for duplicate contacts by comparing the first two fields and/or the primary key. If a duplicate is found, the user is given the option to create the new contact or to go back and fix the data.

Working with Address Book Contacts

Selecting a contact in the Address Book (by clicking the hypertext link) displays the details of that contact. You also get a new set of buttons for that contact.

Contact Options

- **Edit Contact**—Edit the Address Book contact (if you have permission).
- **Copy Contact**—Create a copy of the contact.
- **Delete**—Delete contact from Address Book (if you have permission).
- **Create Issue**—Create a new Issue from an existing Address Book contact, with all of the contact's information pre-filled.
- **History**—Lists all Issues for that contact.
- **Report**—Reports all Issues (with details) for that contact in a separate browser window.

Organizational Unit

If contacts are grouped by an Organizational Unit, such as Department or Company, two fields have hypertext links. If the Organizational Unit field is selected for a contact, the Master Contact record is displayed. Options include:

- **History**—Lists all Issues for that contact.
- **Report**—Reports all Issues (with details) for that contact in a separate browser window.
- **List Contacts**—List all contacts for the Organization.

NOTE

The name of the contact records and Issue records can be changed by the **FootPrints** administrator. For clarity, this manual always refers to **FootPrints** contact records as "contacts", and to Issue records as "Issues".

Create a New Issue from the Address Book

You can create an Issue directly from the Address Book, with the contact's information pre-filled, in addition to creating one from the **FootPrints** Toolbar.

To create a new Issue from the Address Book:

1. Use the A-Z hypertext letters at the top of the Address Book screen to search for the contact's Last Name or other first field. You can also use the Quick or Advanced Search options to search on other fields.
2. Once you have found the contact, click the hypertext link for that contact display the details.
3. Click Create Issue on the menu above the Contact Detail View.
4. The New Issue page is displayed in the main **FootPrints** window and the contact's information is pre-filled in the Contact Information. The Address Book window remains active, but in the background.
5. Fill out the rest of the Issue as described in *Create Test Issue* and click **SAVE**. The new Issue is registered and given a number.

Address Book Search and Report Options

The search options for the Address Book are:

- **A-Z links**—Click a link to list the contacts for that letter or number. The field it refers to is the first field in the Address Book. By default, this is Last Name, but it could be any field, such as Company, Department, etc.
- **Quick Search**—The quick search option appears in the top frame of the Address Book. Search for a name in the first or second Address Book field. This search is always anchored to the beginning of the field. For example, if the string smi is entered and Last Name is selected to search on, Smith and Smithe might be returned, but Goldsmith is not returned.
- **Advanced Search**—Available by clicking the Advanced link below the Quick Search. Search on any combination of Address Book fields.
- **Reports**—Reports can be generated on contact information from the Address Book.
- **Saved Searches and Reports**—Create saved searches and report templates of contacts.

Address Book Contact Search

The Advanced Search is available by selecting the Advanced link below the Quick Search field. A search can be done on any combination of Address Book fields.

After selecting Advanced, you can run, edit, or delete personal or shared searches. These options work the same as with Issue searches. In the same way, you complete search criteria to create a new search.

The following options are available in the Address Book Advanced Search form:

1. **Contact Information**—The fields in this section differ depending on the fields in the current Address Book. Search on as many fields as desired. Search methods vary with the field data types:
   - **Character field**—Displays a text box. Enter the word or phrase for which to search.
   - **Number field**—Displays a text box. Enter the number or part of a number for which to search.
   - **Drop-down and Multi-select field**—Displays a multi-select dialog box. Highlight one or more values for which to search. To search for Issues that contain no data for the field, select No data. If you do not want to restrict the search based on choices in a field, do not highlight any values.
   - **Date fields**—Search on a date or date range. Date Field Search Options.

NOTE
Date/time fields can only be searched by date, not time.

   - **Other field types**—Email, URL, and FTP fields display a text box. Enter the word or phrase for which to search (including partial addresses).
2. **Order search results by**—Select a field to use in ordering the output. All output is displayed in alphanumeric order (numbers first, then alphabet characters). For example, if you select "Last Name", the output is displayed in alphabetical order according to the Last Name field.
3. **And/Or**—If And is chosen, contacts must match all criteria chosen above (this is the default). If Or is chosen, only one criterion must be met.
4. **Anchoring**—By default, searches in the Address Book are anchored on the first letter for each field. If you would rather not anchor searches (such as when looking for a value that

might appear in the middle of an address book field), you may do so by selecting Non-anchored.

5. Data encoding—Select the type of data encoding to use in displaying the output. Options are:

   - Server default—The default encoding that is in use for the FootPrints server. Leave this as the selection if you are unsure about which choice to make.
   - UTF-8—UTF-8 is very universal and handles pretty much all scripts. If you have any problems with garbled characters in the output and are not exporting the output to an application such as Microsoft Excel, then use UTF-8. Otherwise, if there are no problems with the output, leave this field at the "server default" option.
   - UTF 8 with Signature (MS Excel Compatible)— UTF-8 with Signature (MS Excel Compatible) prints a UTF-8 Signature at the beginning of the file, which allows certain applications, such as Microsoft Excel, to identify the text as UTF-8. Without this signature, those applications interpret the data with the server's local encoding and some characters may be garbled.

6. Run Search—Click GO to run the search.
7. To save the search as a template, enter a name. Choose Personal to save the search for yourself. Choose Shared/Internal to share your search with other internal FootPrints users. Each time a saved search is run, it returns the latest matching data.
8. The search results are displayed in the Address Book Homepage.

Address Book Reports

Reports can be generated on contact information from the Address Book. The results are not related to Issue information, but strictly on contact information from the Address Book. To access Address Book reporting functions, click the Reports button on the Address Book toolbar.

NOTE

The names of many of the fields in FootPrints can be changed by the administrator, including the name of the records in the Address Book. For clarity, this manual always refers to Address Book records as "Contacts".

Shared and Personal Address Book Reports

For details on how to run, edit, or delete a saved Address Book report, refer to *Run a Saved Personal or Shared Report*, *Edit a Saved or Shared Report*, or *Delete a Saved or Shared Report* elsewhere in this document. Those sections refer to running a report on issues, but the principles are the same for Address Book reports.

Create an Address Book Report

1. To create a contact report, select **Report** from the Address Book toolbar.
2. **Specify the Format of the Report**—Options include:
   - **Title**—This is displayed at the top of the report.
   - **Date**—The date the report is run (updates each time the report template is re-run).
   - **Time**—The time the report is run (updates each time the report template is re-run).
   - **Address Book name**—The name of the Address Book.
   - **Logo graphic**—The logo image displayed in the current Address Book.
3. **Sort Order**— Select a field to use in ordering the output. All output is displayed in alphanumeric order (numbers first, then alphabet characters). For example, if you select "Last Name", the output is displayed in alphabetical order according to the Last Name field.
4. **Select Report Criteria**—Choose the criteria for the report. Only fill in or choose the criteria for which to search. The Address Book Reporting criteria section uses the same mechanism as the Advanced Search. Refer to section above on *Advanced Search* for a detailed explanation of criteria.
5. **And/Or**—If And is chosen, contacts must match all criteria chosen above (this is the default). If Or is chosen, only one criterion must be met.
6. **Anchoring**—By default, searches in the Address Book are anchored on the first letter for each field. If you would rather not anchor searches (such as when looking for a value that might appear in the middle of an address book field), you may do so by selecting Non-anchored.
7. **Data encoding**—Select the type of data encoding to use in displaying the output. Options are:
   - **Server default**—The default encoding that is in use for the FootPrints server. Leave this as the selection if you are unsure about which choice to make.
   - **UTF-8**—UTF-8 is very universal and handles pretty much all scripts. If you have any problems with garbled characters in the output and are not exporting the output to an application such as Microsoft Excel, then use UTF-8. Otherwise, if there are no problems with the output, leave this field at the "server default" option.
   - **UTF 8 with Signature (MS Excel Compatible)**— UTF-8 with Signature (MS Excel Compatible) prints a UTF-8 Signature at the beginning of the file, which allows certain applications, such as Microsoft Excel, to identify the text as UTF-8. Without this signature, those applications interpret the data with the server's local encoding and some characters may be garbled.
8. **Create Report**—Click **GO** to run the report.

To save the report as a template, enter a name. Choose Personal to save the report for yourself. Choose Shared/Internal to share your report template with other internal FootPrints users. Each time a saved report template is run, it returns the latest matching data.

NOTE

Saving the report here only saves the report formatting options and criteria chosen in this form, not the results of the report. This feature can be used to run the same report in the future. For example, you could set the report to be run once a week. Each time the report is run, it returns the latest data from the current Workspace. Saving report output is covered in *Saving and Printing Report Data*.

After clicking **GO**, the report is displayed in a separate browser window. Large reports sometimes take a few minutes to run. The report can be saved or printed from the browser window.

NOTE

Saving the report here only saves the report formatting options and criteria chosen in this form, not the results of the report. This feature can be used to run the same report in the future. For example, you could set the report to be run once a week. Each time the report is run, it returns the latest data from the current Workspace. Saving report output is covered in *Saving and Printing Report Data*.

Master Contact Records

Master Contact Record Actions

If the Master Contact Record feature is configured, if you move your mouse over the Home button on the Address Book toolbar, a menu is displayed for the Master Contact Record Home. Note that the name used for this is not "Master Contact Record Home", but the name of the field used for Master Contact Records. If the field used is "Company", the menu selection will say "Company Home". If you select the Master Contact Record Home, records are displayed in alphanumeric order based on the field used for the Master Contact Record. For example, if the records are organized according to a field called Company Name, the first column listing contact records will be based on that field.

The Master Contact Record feature enables the user to take the following actions on the Address Book homepage:

- Create a Master Contact Record
- Search for Master Contact Records
- View details of Master Contact Records

From the Details page of a Master Contact Record, a user can:

- Edit the record
- Copy the record
- Delete the record
- Create a new issue
- View a history search
- Generate a report on the history
- List associated contacts

In addition, the label "Master Contact Record" can be changed as a system preference or as a Workspace preference. The term "Contact" is used as a default and may be changed prior to configuring the Master Contact Record feature. If that is the case and the term was changed previously to something like "Customer", this would be displayed as "Master Customer Record".

NOTE

The Master Contact Record is only available for FootPrints Address Book users.

Creating a Master Contact Record

Creating a Master Contact Record is simpler than creating a new contact. To create a Master Contact Record, use the following procedure::

1. Select Address Book from the FootPrints Toolbar. The Address Book Homepage is displayed.
2. Select **Create Master Contact Record** from the Create Contact menu. The Create New Master Contact Record page is displayed. Note that the name used for this is not "Create Master Contact Record", but the name of the field used for Master Contact Records. If the field used is "Company", the menu selection will say "Create Company".
3. Enter the data in the appropriate fields. For example, if you are using a field named "Company" for lookup, enter the name of the company in the Company field.
4. To update all records that have a matching Master Contact Key, check the Update Contacts checkbox. This updates all of the records that have the same value in the Master Contact Key with the same data in the contact fields.
5. Click the GO button. The Master Contact Record has been created.

NOTE

The Master Contact Record is only available for FootPrints Address Book users.

Searching for Master Contact Records

To search for Master Contact Records, from either the Address Book home or Master Contact Record home, you can use the Quick Search field and select the Master Contact Record field from the drop-down, then search for records that have the specified string in the Master Contact Record field. For example, if the Master Contact Record field is "Company" and you are looking for all records for the International Widget Company, you could enter the string "Internat" in the Quick Search field, select "Company" from the drop-down, and then start the search. Because Quick Searches are anchored searches, the string you enter must start with the first letters that would appear in the Master Contact Record field. In the above example, searching for "Widget" would not work.

To perform non-anchored or more complex searches, you must use the Advanced search feature.

To search for a Master Contact Record:

1. Click the Advanced link below the Quick Search field on either the Address Book home or Master Contact Record home.
2. Enter the search data and select from the options to search for the Master Contact Record or Records. For a Master Contact Record search, be sure to enter data in the Master Contact Record field. The records you find will be further filtered by any other fields in which you enter data. For example, if your Master Contact Record field is "Company", you must enter characters in the Company field. To find all the records for that one entity, only use the Master Contact Record field and do not enter data in any other fields.

   Other options on this page are:

   - Order search results by—Select the order in which matching records are displayed by choosing a field from the drop-down list. The drop-down contains all of the Master Contact Record fields. Records will be displayed in alphabetical order based on the field you select here. For example, if you have two Master Contact Record fields named Company and Service Level and you choose to order the search results according to the Service Level, then "Bronze" is displayed in the results before "Gold".
   - And/Or—Display only those records that match all fields by selecting And or display records that match any fields by selecting Or.

- **Anchored/Non-anchored**—When you select the Anchored option, **FootPrints** searches for matching records starting with the first letter of the Master Contact Record fields. If you select Non-anchored, **FootPrints** searches for any records that match the field data you provided regardless of where that string appears in the field. For example, if you perform a non-anchored search with "idge" entered in the Company field, **FootPrints** would display Master Contact Records for companies with names like "Widget" and "North Ridge".
- **Data Encoding**—Select server default, UTF-8, or UTF-8 with Signature from the drop-down list.
  - **Server default**—The default encoding that is in use for the FootPrints server. Leave this as the selection if you are unsure about which choice to make.
  - **UTF-8**—UTF-8 is very universal and handles pretty much all scripts. If you have any problems with garbled characters in the output and are not exporting the output to an application such as Microsoft Excel, then use UTF-8. Otherwise, if there are no problems with the output, leave this field at the “server default” option.
  - **UTF 8 with Signature (MS Excel Compatible)**— UTF-8 with Signature (MS Excel Compatible) prints a UTF-8 Signature at the beginning of the file, which allows certain applications, such as Microsoft Excel, to identify the text as UTF-8. Without this signature, those applications interpret the data with the server's local encoding and some characters may be garbled.

3. After you have entered your criteria, select **GO**. **FootPrints** displays all of the Master Contact Records that match your criteria.

Viewing Details of Master Contact Records

You can edit, copy, or delete a Master Contact Record from the Master Contact Record Details page. You can also create a new issue, view the Issue history, generate a history report, and list associated contacts from this page.

To view the Details page of the Master Contact Records, click on the first column of one of the records in the list. The Master Contact Record Detail View page is displayed.

Editing the Master Contact Record from the Details Page

You can edit a Master Contact Record from the Master Contact Record Details page.

To edit a Master Contact Record:

1. Display the record on either the Address Book or Master Contact Record home page.
2. Click on the first column of the record you want to edit. The Master Contact Record Detail View page is displayed.
3. Select the Edit link from the options above the detail view of the record. The Edit page is displayed.
4. Edit the fields as appropriate.
5. To update all records that have a matching Master Contact Key, check the Update Contacts checkbox. This updates all of the records that have the same value in the Master Contact Key with the same data in the contact fields.
6. Click the **GO** button at the bottom of the page to save the changes.

Copying the Master Contact Record from the Details Page

You can copy a Master Contact Record from the Master Contact Record Details page.

To copy a Master Contact Record:

1. Display the record on either the Address Book or Master Contact Record home page.
2. Click on the first column of the record you want to copy. The Master Contact Record Detail View page is displayed.
3. Select the Copy link from the options above the detail view of the record. The Copy page is displayed.
4. Enter a new company name and edit other fields as needed.
5. To update all records that have a matching Master Contact Key, check the Update Contacts checkbox. This updates all of the records that have the same value in the Master Contact Key with the same data in the contact fields.
6. Click the **GO** button at the bottom of the page to create the new record with copied data. The record that you copied from is unchanged.

Deleting the Master Contact Record from the Details Page

You can delete a Master Contact Record from the Master Contact Record Details page.

To delete a Master Contact Record:

1. Display the record on either the Address Book or Master Contact Record home page.
2. Click on the first column of the record you want to delete. The Master Contact Record Detail View page is displayed.
3. Click the **Delete** link from the toolbar above the detail view of the record. A confirmation pop-up is displayed.
4. If you choose to delete the record, click OK on the pop-up. Otherwise, click Cancel. If you click on OK, a password page is displayed. An administrator password is required to delete a Master Company Contact Record.
5. Enter your administrator password and click **GO** to complete deletion of this record.

Creating a New Issue from the Master Contact Record Details Page

You can create a new issue from the Master Contact Record Details page.

To create a new issue from the Master Contact Record Details page:

1. Select Address Book from the **FootPrints** toolbar, select Master Contact Record Home from the Home button, and then click the first column of the record for which you want to create an issue. The Master Contact Record details page is displayed.
2. Select the **Create Issue** link from the toolbar above the detail view of the record. The **FootPrints** New Issue page is displayed, with the contact information populated with data from the Master Contact Record.
3. Complete the rest of the information for the new Issue as normal. When the Master Contact Record feature is enabled, it places a new button in the Contact Information section of the New Issue page.

Generating a History Report from the Master Contact Record Details Page

You can generate a History Report from the Master Contact Record Details page.

To generate a History Report from the Master Contact Record Details page:

1. View the Details of the Master Contact Record (refer to Viewing Details of Master Contact Records).
2. Select the **Report** link from the toolbar above the detail view of the record. The **FootPrints** Select Report Format page is displayed.
3. Select the type of report you wish to view from the drop-down, then click **GO**. The report is generated and displayed.

Calendar and Scheduling

The **FootPrints** Calendar is a web-based calendaring system fully integrated with **FootPrints** issue tracking and customer problem management. Agents and administrators can track personal and Workspace-wide appointments, schedule meetings, jobs, and more. Calendar appointments can be linked to **FootPrints** issues. Recurring appointments can be created that automatically create new Issues when the next recurrence occurs. Appointments can be synchronized with an external calendar via email and appointments made in the external calendar can also be synchronized in the **FootPrints** calendar. Work schedules can be defined for the Workspace and for individual Agents, including regular work hours, holidays, vacations, and sick leave, reducing conflicts when scheduling work.

There are three options for the **FootPrints** calendar system:

- **Workspace**—The Workspace Calendar can be used to track appointments for all Agents and Teams for a **FootPrints** Workspace. Each Workspace has its own calendar.
- **Personal**—Each Agent/administrator in **FootPrints** has a personal Calendar. This is a place to add both personal appointments and work-related appointments. The personal Calendar remains constant throughout all Workspaces for a user.
- **Availability**—Each Agent/administrator can have an availability schedule defined for them, minimizing conflicts when work appointments are scheduled. Availability can be linked to date/time fields in an issue.

NOTE

Two-way synchronization of appointments requires the Numara FootPrints Sync add-on module. Refer to *Numara FootPrints Sync* for details on how to administer this feature.

The following topics cover the different aspects of the Calendar:

- Calendar Basics
- Viewing Appointments
- Creating Appointments
- Editing Appointments
- Syncing Appointments
- Linking Appointments to Issues
- Creating Recurring Issues from the Calendar

- Calendar Preferences

The following topics cover the different aspects of Availability Scheduling:

- Viewing Schedules
- Checking Availability from the Calendar
- Checking Availability for an Issue

Calendar Basics

There are two types of Calendar in **FootPrints**:

- **Workspace**—The Workspace Calendar can be used to track appointments for all Agents and Teams for a **FootPrints** Workspace. Each Workspace has its own Calendar.
- **Personal**—Each Agent/administrator in **FootPrints** has a personal Calendar. This is a place to add both personal appointments and work-related appointments. The personal Calendar remains constant throughout all Workspaces for a user.

To view a Calendar, select Calendar from the **FootPrints** Toolbar's More menu. Select Personal to view your own Calendar, or select Workspace to see the Calendar for the current Workspace.

The Calendar consists of the following parts:

- **Main Frame**
  - **Day View**—A representation of the current day, with each hour represented. All of the day's appointments are listed in this area by hour. To see the details of an appointment, click the Title. To edit an appointment, click the **Edit** icon on the detailed view. The **Edit** icon is only visible if you have editing permission for the Calendar. To delete an appointment, click the **Delete** icon. To view a different day:
    - Use the Next and Previous arrows at the top of the screen to advance or go back one day at a time, and/or
    - Select a day from the current month on the left side of the screen. Use the small arrows to change months.
    - Use the "Go to Date" option to enter a specific date. That is, enter a date in the fields at the bottom left of the main Calendar frame and then click the  icon.
  - **Refresh**—Refresh the current view.
  - **Print**—Print the current view.
  - **Close**—Close the Calendar.
- **Left Frame**
  - **Current Month**—A small representation of the current month is displayed on the left side of the screen. Navigation options include:
    - Select a day to show the Day View for that day.
    - Select a Week (W1, W2, etc.) to switch to Week View for that week.
    - Use the small Next and Previous arrows to switch months.
  - **Create Appointment**—Select this to create an appointment for the current day (see topic on Creating Appointments for complete instructions).

- Go To Date—Enter a specific date and click the GO button to bring up that date in the Day View.

- Other Views—The Calendar can be viewed in multiple formats:
  - Year View—A representation of the current year. No appointments are displayed. Use the Next and Previous arrows to change the year. Select a day, week, or month to display that view.
  - Month View—Displays the current month. Appointments are listed for each day. Use the Next and Previous arrows to change the month displayed. Select a day to go to its Day View. Select an appointment to view the details for that appointment in a pop-up window.
  - Week View—Representation of a week. Appointments are listed for each day. Use the Next and Previous arrows to change the week displayed. Select a day to go to its Day View. Select an appointment to view the details for that appointment in a pop-up window.
  - Day View—The default view for the Calendar (see above).
- Preferences—The user can set various options for his or her own personal Calendar. The Workspace Administrator can set options for the current Workspace Calendar.

Viewing Appointments

Appointments can be viewed on the Calendar in multiple ways:

- Day View—All appointments for that day are listed on the Day View. To view the details, click the Title of the appointment. The details are displayed in a pop-up window.
- Week View—In the Week View, appointments are listed for each day in the box for that day. If your preferences are set to only show a certain number of appointments on the Week view, click the More link to view all appointments for that day. Click the Title of an appointment to view the details for that appointment in a pop-up window.
- Month/Year Views—Because of space limitations, these views do not show individual appointments. Select a day from these views and the Day View is displayed. Click the Title of an appointment to view the details.

Navigation options for the Calendar can be found in Calendar Basics.

Both personal and workspace Calendar appointments can be created by Date/Time fields in Issues. If a Calendar appointment was created by an Issue's Date/Time field, then:

- the date and time from the Issue Date/Time field are set as the date and time of the appointment
- the Assignees on the Issue are listed as the Invitees on the appointment
- the Issue Description field is entered as the appointment Description
- a dynamic link is set between the appointment and the Issue.

With respect to edits made on the Issue or the Calendar appointment:

- if the date or time are updated on the Issue, the Calendar is also updated
- if the Description is updated in the Issue, the original Description is unchanged in the appointment

- if the date and/or time of the appointment are updated in the Calendar, they are updated in the Issue
- if any other details of the appointment are edited in the Calendar, those edits are not changed in the Issue.

Creating Appointments

Appointments can be created in the Calendar using one of the following methods:

- Click the Create Appointment button on the left side of the page when in Day View.
- Select an hour in Day View.

If the Workspace contains at least one Date/Time field, appointments can also be created from the Create Issue page (described in Linking Appointments to Issues).

To create an appointment from either the Workspace or personal Calendar:

1. Click the Create Appointment button or select an hour in the Day View. A pop-up window is displayed with the Create Appointment dialog.
2. Title—Enter a Title for the appointment. This is the subject of the appointment, such as Quarterly Meeting. If it is important for other users to know who is involved in the appointment at a glance, you may want to include the names of the people involved in the Title, e.g., Bob S. to work on Server.
3. Start Time—Select a time for the appointment to start. If a time was selected from the Day View, it is pre-filled here. Hours are listed in one drop-down (1-12 or 0-23 depending on your preferences), with minutes available in 5-minute increments (from 0-55) in a second drop-down. If the 12 hour clock is used, a third drop-down is available to select AM or PM. If an appointment lasts all day, select None for Start and End times. These appointments are displayed at the top of the Day View with no time associated.
4. End Time—Select a time for the appointment to end. If a time was selected from the Day View, this will default to 1 hour after the Start Time. If the 12-hour clock is used, remember to select the correct option for AM or PM. If None is selected for Start Time, it should also be selected for End Time.
5. General Info tab
   - Location—Optionally enter a location for the meeting or Appointment, e.g., Board Room or Customer Site.
   - Link to Issue—If the current Workspace contains at least one Date/Time field, you can optionally link the appointment to an Issue. When creating the appointment from the Calendar, this automatically creates a new Issue with data from the appointment. Select the Date/Time field to populate with the appointment Start Time from the drop-down. Select No Link if you do not want to create and link to an Issue. Refer to Linking Appointments to Issues on page Error! Bookmark not defined. for complete information on this feature.
   - Calendar—This option only appears when creating an appointment in a personal Calendar. If Personal is selected, the appointment is displayed in the user's personal Calendar as well as any invitees' personal Calendars. If Personal & Workspace is selected, the appointment is also displayed in the Workspace Calendar for all users to see. When an appointment is created in the Workspace Calendar, this option is not displayed. These appointments are automatically displayed in the Workspace Calendar and in the personal Calendars of all invitees.

- **Description**—The Description can be used to include any notes or details of the appointment.

6. **Invitees tab**

- **Check Availability**—Before inviting Agents to an appointment, you can check Agent schedules to determine the best time for scheduling the appointment.
- **Invitees**—One or more members of the current Workspace can be invited to the appointment. Examples of invitees would be members of a Team who attend a Team meeting or a technician who is scheduled to work at a customer's site. To invite a user, select the user's name on the left and click the right arrow button. Select **Check Availability** to see who is available for the appointment. To invite an entire Team at one time, click the team name, then select **Assign Team**, then click the right arrow button. The appointment is propagated to the Availability calendar for all the individual members of the team. The ability to invite a Team is only supported in the Day View.

NOTE ON USE OF CALENDAR

Customers, members of other Workspaces, and non–users of **FootPrints** are not available to be Invitees. The **FootPrints** Calendar is intended for use by **FootPrints** Agent/administrator users. If non–Workspace Members must be notified of an appointment, the email notification you receive can be forwarded to them (see below). Users can also be copied on any Issue linked to an appointment.

7. **Email Confirmation tab**—**FootPrints** can send users email confirmation about an appointment. This is in addition to any email notification the users receive regarding **FootPrints** Issues (including linked Issues). Email notifications include all of the information about an appointment as well as an optional link to synchronize the appointment with the Microsoft Outlook Calendar (the link is for those not using the FootPrints Sync add-on module). The options are:

- **Email me**—If this is checked, you receive an email notification about this appointment (regardless of whether you are invited to the appointment).
- **Email Invitees**—If this is checked, all users invited receive an email notification for the appointment.
- **Sync w/Outlook**—If this is checked, email notifications include an attachment that synchronizes the appointment with the user's Microsoft Outlook Calendar (refer to *Syncing Appointments* on page **Error! Bookmark not defined.**–this is not for FootPrints Sync users).
- **Set reminder**—If a reminder is set, users receive a second email notification before the appointment starts. The reminder is sent before the appointment as specified by the person who created the appointment. Time period available before the appointment starts are: 5, 10, 15, or 30 minutes, 1-5 hours, 1 day, 2 days, and 1 week.

NOTE

The time specified for the email notification to be sent is based on the internal clock of the **FootPrints** server. If an appointment is set to begin at 1:00 PM, Monday, December 2, 2005, and the reminder is set for 30 minutes, the email is sent at 12:30 PM of that day based on the time on the server where **FootPrints** is installed.

8. **Recurrence tab**—Appointments can optionally be set to recur at regular intervals. The appointment is displayed on the Calendar for each day that it recurs. For Recurrence, select the Recurrence tab, and then click the Activate Recurrence checkbox. The recurrence controls are activated. Select the type of recurrence you want from the drop-down box.

Options are Daily, Weekly, Monthly, and Yearly. The options for the type of recurrence change depending on the type you select.

- **Daily**—Options are Every X days (where X is a number you specify) or Every weekday (i.e., Monday through Friday)
- **Weekly**—Specify that the appointment recurs every X weeks (where X is a number you specify) and the day of the week on which the appointment recurs.
- **Monthly**—Specify either that the appointment recurs on a date (the 1st, 2nd, 3rd, 4th, etc.) every X many months (e.g., the appointment recurs on the 3rd day every two months) or that the appointment recurs on a day of the week (e.g., the third Tuesday) every X months.
- **Yearly**—Specify either that the appointment recurs on a specific date every year (e.g., August 14) or that the appointment recurs on a day of the week of a specific month (e.g., the third Tuesday every August).
- Next, either select "No end date" or an "End by" date, in which case you must fill out the date by which the recurring appointment ends. For example, you might choose to set up an appointment that occurs on every Monday of every week and then select a date three months later for the appointment to stop recurring on the calendar..

9. Click SAVE to create the appointment. The appointment is added to the Calendar and email notifications are sent to users (if selected). The appointment is displayed in the Day, Week, and Month view of the Calendar.

NOTE

If you want the appointment to appear on the Availability Matrix, it must have a Start Time and End Time. If you select None, the appointment does not appear on the Availability Matrix. To schedule a full day appointment, select Start and End Times of your work day, e.g., 9 AM for the Start Time and 5 PM for the End Time.

Editing Appointments

Appointments can be edited in the Calendar using one of the following methods:

- Click the **Edit** icon for an appointment in the Day View.
- Click the **Edit** button on the Detail View of an appointment (pop-up).

Editing an Appointment

To edit an appointment from either the Workspace or personal Calendar:

1. Click the **Edit** icon for an appointment in the Day or Detail View. A pop-up window appears with an Edit Appointment dialog.
2. Make any changes to the appointment data, such as the Title, Invitees, etc. Refer to *Creating Appointments* for more details on these fields.

NOTE

There is only one description per appointment (unlike the unlimited appends allowed for Issue descriptions). To add additional notes, type them at the end or beginning of the Description field. You may want to manually add a date/time stamp or signature.

3. Click **SAVE** to complete the edit. The changes are made to the appointment and email notifications are sent to users (if selected), including any new invitees.

4. To Cancel the edit, click **Cancel**.

Deleting an Appointment

To delete an appointment, click the **Delete** button on the Day View or Detail View for that appointment. A dialog is displayed confirming that you want to delete the appointment; click OK to delete the appointment, or **Cancel** to cancel the deletion.

NOTE

Depending on your permissions, Agents may not be able to edit or delete appointments on the Workspace Calendar. Agents can always edit and delete appointments on their personal Calendars. If you are viewing one of your appointments on the Workspace Calendar and you want to edit or delete it, you must switch to your personal Calendar and edit/delete it from there.

Syncing Appointments

While the **FootPrints** Calendar has many advantages (it's web-based, integrated with **FootPrints** Issues, etc.), most people use it in addition to their usual personal or desktop calendar for tracking their appointments. In light of this need, **FootPrints** Calendar appointments can be synchronized to Microsoft Outlook via email and the Vcal standard.

NOTE

Synchronizing appointments with Outlook as described here is separate from the FootPrints Sync add-on module. This function is part of the base product and is not used if you are using FootPrints Sync.

VCal is a standard used by software programs to allow users to exchange calendar appointments between different calendar applications. **FootPrints** Calendar email notifications can include VCal attachments that allow users to place **FootPrints** Calendar appointments in their Outlook calendar with a mouse click.

To synchronize an appointment with your desktop Outlook calendar:

1. Create an appointment in the **FootPrints** Calendar.
2. Check the box for Sync w/Outlook. For invitees of the appointment to synchronize with their Outlook calendar, the Email Invitees checkbox must also be selected. If you would like to synchronize the appointment and you are not an invitee, only the creator, check the box for Email me as well.
3. An email notification is sent to your Outlook Inbox. Double-click the email to view the details.
4. The email contains an attachment. Double-click the attachment.
5. A Microsoft Outlook dialog box is displayed. The dialog asks if you would like to accept the appointment.
6. Accept the appointment.
7. If someone else has created the appointment, you can send an email confirmation to the user. If you do, Outlook sends the creator an email stating that you accept the appointment.
8. The appointment is included in your Outlook Calendar. All of the data for the appointment (Title, Location, etc.) is populated. If a reminder was set in the **FootPrints** appointment, the reminder is also set in Outlook (i.e., you receive the Outlook pop-up reminder dialog 15 minutes before the appointment is scheduled, etc.)

NOTE

Synchronizing with Outlook is one-way only. Changes made to appointments in Outlook are not reflected in FootPrints. Changes made in the FootPrints Calendar result in another email notification. If the Vcal attachment is double-clicked and accepted, the change is made in Outlook.

Linking Appointments to Issues

The FootPrints Calendar can be used strictly to track appointments added manually to the Calendar by Workspace members. It can be even more powerful if appointments and Issues are linked together.

If the current Workspace contains at least one Date/Time field, you can optionally link the appointment to an Issue. When creating the appointment from the Calendar, this automatically creates a new Issue with data from the appointment. Appointments can also be created automatically from the Create Issue and Edit Issue screen.

Some practical applications for linking appointments and Issues include:

- Showing when Agents are scheduled to work on specific Issues for scheduling purposes.
- Scheduling field service technicians to work on jobs (which came in as FootPrints Issues).
- Scheduling Workspace or Team meetings related to a particular FootPrints Issue.
- Displaying all of your follow-up calls on the Calendar.
- Displaying due dates for important Issues on the Calendar.
- Scheduling recurring maintenance calls.

The following subtopics explain the different aspects of linking appointments and Issues:

- Setting Up FootPrints to Link Appointments and Issues
- Creating an Appointment from an Issue
- Creating an Issue from an Appointment
- Viewing Linked Appointments
- Editing Linked Appointments

Setting Up FootPrints to Link Appointments and Issues

The only requirement to link Appointments and Issues is a minimum of one Date/Time field in the Workspace. The Date/Time field is a supported field type for FootPrints Issues that allows the user to specify a calendar date and time to associate with an Issue. Examples of a Date/Time field include Due Date, Start Date, Follow-up Date, and Work Scheduled.

Workspace Administration permissions are required to create a Date/Time field. An unlimited number of Date/Time fields can be created. The user can choose which field to use when creating the appointment or Issue.

NOTE

Plain Date fields are not supported for linking to the Calendar, as no time can be specified for this data type.

Creating an Appointment from an Issue

To create an appointment from an Issue:

1. On the Create Issue or Edit Issue page, fill out all of the information for the Issue.
2. Select the Date/Time field to be used for the link (for example, Due Date). Date/Time fields are indicated by the Date/Time icon: .
3. In the Date/Time field pop-up, select the date and the start and end times for the appointment. To select the start and end times, click the radio button, select a time from the times list for the start of the appointment, then do the same for the end of the appointment. If no time is required (only a date), check the box for No Time.
4. For Calendar, select either Personal or Personal & Workspace. If Personal is selected, the appointment is added to each assignees' personal Calendar. If Personal & Workspace is selected, the appointment is also displayed on the Workspace Calendar for the current Workspace.
5. Click **GO** in the pop-up to complete the date/time field selection, then click **GO** to submit the Issue.
6. The Issue is created and an appointment on the appropriate Calendar/Calendars is also created.

You can view the link to the Appointment on the Detail View of the Issue. The data for the Appointment includes:

- **Appointment Date**—The date selected in the Issue for Due Date.
- **Title**—The title of the Issue becomes the Title of the appointment.
- **Start Time**—The time of the selected for Due Date in the Issue.
- **End Time**—Default to one hour after the Start Time.
- **Linked to Issue X using Due Date field**—The Issue number is displayed along with the name of the field used in the link.
- **Invitees**—Users assigned to the Issue are listed as invitees.
- **Description**—The initial Issue Description is included here. The description information is not updated even if the Issue Description field is updated afterwards.

Creating an Issue from an Appointment

An Issue can be created from an appointment. When this method of Issue creation is used, the Issue is pre-filled with the data from the appointment. Additional Issue data can be entered from the Issue page.

NOTE

The names of many of the fields in **FootPrints** can be changed by the administrator (Title, Priority, Status, Description, etc.), as well as the name of the records (Issue). Custom fields can also be created. For clarity, this manual always refers to **FootPrints** records as "Issues" and uses the default terms for the other field names.

To create an Issue from an appointment:

1. Click the **Create Appointment** button or select an hour in the Day View of the Calendar. A pop-up window is displayed with a Create Appointment dialog.
2. Enter the data for Title, Description, Invite Users, etc. Refer to *Creating Appointments* for complete instructions.
3. For the Link to Issue field, select the Date/Time field to link, e.g., Due Date.
4. Click **SAVE** to create the appointment. The appointment and the Issue are created and the Create Appointment page for that date is displayed.

Both the Issue and an Appointment are created and linked.

Viewing Linked Appointments

A reference to the link can be found on both the Appointment and the linked Issue. To view the link:

- On the Detail View of an appointment in the Calendar, a link called Linked to Issue #*n* using the *Due Date field* (where *n* is the Issue number and *Due Date* is the name of the Date/Time field) is displayed.
- On the Detail View of the Issue, the reference Linked to Calendar is displayed along with the Linked to Calendar icon. Click the link to view the details of the appointment in a pop-up window.

Editing Linked Appointments

Issues and appointments that are linked can be edited from either record with the other automatically updated.

Fields that cause an update are described below.

For Appointments

- **Title**—Updating the Title field changes the Title of the Issue.
- **Start Date/Time**—Changing the Start Date/Time updates the corresponding field in the Issue (Due Date, Follow-up Date, etc.)
- **Invitees**—Changing the invitees changes the assignees of the Issue.
- **Description**—If you update the Description field, the latest description of the linked issue is updated as well.

For Issues

- **Title**—Updating the Title field changes the Title of the Issue.
- **Date/Time field**—Changing the data in the linked Date/Time field (Due Date, Follow-up Date, etc.) changes the Start Date/Time in the appointment. The End Date/Time defaults to one hour after the new Start Time.
- **Assignees**—Changing the assignees changes the invitees of the appointment.
- **Description**—Updating the Description field of the Issue does not alter the description of the linked appointment.

Recurring appointments function differently. If the Appointment is edited, only future Issues are affected. In the case of appointments that recur Today and *n* consecutive days (which only makes one Issue), the Issue is updated as described above.

If an Issue created from a recurring appointment is edited, it does not affect the appointment. This is because that instance of the Issue may have special properties or notes that are relevant only to that instance. To change the properties of all future Issues for the common fields (Title, Assignees/Invitees, etc.), the edit should be made to the originating appointment.

Creating Recurring Issues from the Calendar

Recurring appointments can be created that create new Issues automatically when the next recurrence occurs. This is useful for scheduling recurring maintenance jobs that require a ticket to be created and assigned to a particular user automatically.

The appointment must originate in the Calendar. That is, you must make the appointment first (as a recurring appointment) and link it to an Issue via a Date/Time field. Recurring Issues cannot be created if the Issue is created first.

NOTE

The names of many of the fields in **FootPrints** can be changed by the administrator (Title, Priority, Status, Description, etc.), as well as the name of the records (Issue). Custom fields can also be created. For clarity, this manual always refers to **FootPrints** records as "Issues" and uses the default terms for the other field names.

To create a recurring appointment which creates automated recurring Issues:

1. Click the Create Appointment button or select an hour in the Day View in the Calendar. A pop-up window is displayed for the Create Appointment dialog.
2. Fill in the data for Title, Description, Invite Users, etc. Refer to *Creating Appointments* for complete instructions.
3. For the Link to Issue field, select the Date/Time field to link, e.g., Due Date.
4. For Recurrence, select the Recurrence tab, and then click the Activate Recurrence checkbox. The recurrence controls are activated.
5. Select the type of recurrence you want from the drop-down box. Options are:
   - Daily
   - Weekly
   - Monthly
   - Yearly
6. The options for the type of recurrence change depending on the type you select.
   - **Daily**—Options are Every *x* days (where *x* is a number you specify) or Every weekday (i.e., Monday through Friday)
   - **Weekly**—Specify that the appointment recurs every *x* weeks (where *x* is a number you specify) and the day of the week on which the appointment recurs.
   - **Monthly**—Specify either that the appointment recurs on a date (the 1st, 2nd, 3rd, 4th, etc.) every *x* many months (e.g., the appointment recurs on the 3rd day every two months) or that the appointment recurs on a day of the week (e.g., the third Tuesday) every *x* months.

- **Yearly**—Specify either that the appointment recurs on a specific date every year (e.g., August 14) or that the appointment recurs on a day of the week of a specific month (e.g., the third Tuesday every August).

7. Next, either select "No end date" or an "End by" date, in which case you must fill out the date by which the recurring appointment ends. For example, you might choose to set up an appointment that occurs on every Monday of every week and then select a date three months later for the appointment to stop recurring on the calendar.
8. Click **SAVE** to create the appointment. The appointment and the issue are created and the Create Appointment page is displayed for that date.

Issues are created automatically by the system each time the appointment occurs. The first Issue created contains the manual information entered on the Issue page; subsequent Issues only contain the information taken from the appointment.

Calendar Preferences

The user can set various options for his or her own personal Calendar. The Workspace Administrator can set options for the current Workspace Calendar.

To set the preferences for the Calendar, select the Preferences link from the Day View of the Calendar.

The options are:

- **Email myself after appointment creation and update**—By default, the creator of an appointment receives an email notification for the appointment being created or updated regardless of whether the creator is invited. If this option is turned off, emails are not sent to the creator by default. The option can be overridden for a particular appointment when creating or updating it using the Email Me checkbox option.
- **Email all invitees after appointment creation and update**—By default, users invited to an appointment receive an email notification when an appointment is created or updated. If this option is turned off, emails are not sent, by default. The option can be overridden for a particular appointment when creating or updating it using the Email Invitees checkbox option.
- **Display the full item in the week/month views instead of truncating items that are too long**— All appointments for that week/month with full titles are displayed by default in Month View. To limit the number and size of appointments displayed, select NO for this option and select a maximum number and size using the two following options
  - **Number of items to show for each day in week/month views, if truncating items in week/month views**—Select the maximum number of appointments displayed for each day in the week/month View. This option only applies if the option above is set to NO.
  - **Number of characters in day boxes of week/month views before truncating the item, if not displaying the full item**— Select the maximum number of characters to display per appointment for all appointments displayed in the Month View. This option only applies if the first option above is set to NO.
- **Show hours for items in week/month views**—By default, the hours of items in the week and month views of the calendar are displayed. You can turn that off.
- **Show items in day view in all hours during which they occur**— By default, appointments that span multiple hours (e.g., 10:00 AM-12:00 PM) only display in the first hour in which they occur. If this option is enabled, appointments display in each hour block they occur as duplicate appointments.

- **Show hours with no items in day view**—By default, the day view calendar shows all the hours of the work day, regardless of whether there is an item during that hour. This can be turned off so that only hours with items entered are shown.
- **Show end time on week/month views**—By default, the end times for items on the week/month view of the calendar are displayed in addition to the start time. This can be turned off so that only the start time is displayed.
- **Show name of user who added or last edited each item**—This is turned off by default. If this option is enabled, the name of the user who created or last edited an appointment is displayed in parentheses next to the appointment in Day, Week, and Month Views (individual appointments are not displayed in Year view).
- **Day to start weeks on**—By default, weeks are displayed from Sunday-Saturday. You can elect to display weeks from Monday-Sunday by selecting Monday.
- **Time to start/end day view at, in 24-hour time format**—By default, the hours displayed in the Day View are 8:00am-5:00pm (0800-1700). You can elect to change this range using these two options. Appointments can be created for any time regardless of what is selected here.
- **12 or 24 hour time format**—Hours displayed on the Day View are displayed in the 12 hour format using AM and PM by default. If 24 is selected, hours are displayed in the 24 hour format.
- **Number of items to show for each day in week/month views, if truncating items in week/month views**—Specify the number.
- **Number of characters in day boxes of week/month views before truncating the item,if not displaying the full item**—Specify the number.
- **Time slot length (in minutes) on the day view page**—Time slots on the day view are displayed as 60 minute slots by default. You have the option to set the time slot to 15, 20, 30, or 60 minutes.
- **Default reminder time**—You can set reminders to be displayed X minutes/hours before the appointment or turn off reminders.

After you make changes, click the **GO** button. Click **Cancel** to cancel changes.

About Scheduling and Availability

Scheduling allows you to manage your work schedule and make it available to other Agents in the Workspace, minimizing conflicts. The Workspace Calendar is defined by the Workspace Administrator. Default schedules can be created for all Agents in a Workspace, but Agents can also modify their own schedules as necessary.

The following topics cover the different aspects of scheduling and availability for Agents:

- Viewing Schedules
- Checking Availability
- Linking Availability to Issues

Viewing Schedules

Agent schedules can be accessed by selecting More | Calendar from the **FootPrints** Toolbar, then clicking the Availability link. Both the Workspace and the Personal calendars show availability for all agents in the project from the Availability link.

A legend in the lower left of the window explains the matrix, using the colors that have been defined by your administrator.

- **Available**—Agent is available.
- **Appointment**—Agent is at an appointment, but working.
- **Out of Office**—Agent is out of the office.
- **Holiday/Exception**—Agent is out of the office due to holiday or vacation, etc.

There are various options on this page:

- **Day View/Week View**—Select Day View to display the availability schedule for one day. Click the Week View icon to display the availability schedule for the entire week.
- **Change the date**—The Agent Availability pop-up window defaults to a schedule for the current day. To change the day, use the and buttons at the top of the window.
- **Display Agents**—The default display shows availability for all Agents. Available Agents (no appointments at the moment), Agents who are logged on or Agents by Team can be displayed by selecting an option in the Display drop-down.
- **Start Time**—The start of the work day defaults to 7:30 AM to 5:30 PM. Select a different start time from the drop-down to change the time range. Start times between midnight and 2 PM can be selected. You can also change the start and end times using the and buttons within the availability matrix.

The actual scheduling of an Agent's time is done from the Agent Work Schedule, from the Calendar, and from the Create Issue and Edit Issue page when linked to the Calendar via a Time/Date field.

Checking Availability from the Calendar

Agents can access this window from the Calendar while scheduling appointments and from the Create Issue and Edit Issue pages. In addition to the options explained in *Viewing Schedules*, you can select the Agents you would like to invite to the appointment.

To include Agents in an appointment:

1. Select **Create Appointment** from the Workspace or personal Calendar.
2. Click **Check Availability**. The Agent Availability matrix window opens.
3. After reviewing the matrix, check the box(es) next to the names of the Agents you wish to invite to the appointment. If you allow the cursor to hover over an unavailable time slot, a small pop-up is displayed showing the reason that the Agent is unavailable.

NOTE
You will get a warning message if you select the name of an Agent whose time is not free for the scheduled appointment if the Auto-check Availability option is enabled.

4. Click **GO**. The Create Appointment page is displayed. The names of the Agents you checked are included in the list of invitees.

Checking Availability for an Issue

When creating or editing an Issue, you can check your availability or the schedules of Agents right from the Create or Edit issue screen.

1. Select Check Availability from the Assignee section of the Create Issue or Edit Issue page.
2. The availability matrix displays today's date. If your administrator associated date fields with the schedule, for example, Follow-up Date, you can switch to that date to see Agent availability. You can also click Change Date to select a different day's schedule to view.
3. Check the boxes next to the names of the Agent(s) you want to assign to the Issue.
4. Click **GO**.
5. If you've selected an Agent who isn't available at the moment or based on the date/time field selected, and the Auto-check Availability option is enabled, a warning message is displayed asking if you want to continue with the assignment.

Using FootPrints Email

FootPrints' Email Management feature gives you many of the capabilities of email management tools to use in conjunction with the web interface. The system can send customized email notifications to users and process incoming email submissions and updates. As an Agent user in **FootPrints**, you can send email updates to users containing your latest comments about an Issue. You can also submit and update Issues via email and query the database from email. The available features depend on the options enabled by your **FootPrints** administrator.

Email Notification

FootPrints' email notification feature allows the Agent to email other users about Issues from within **FootPrints**. The administrator can configure rules to control when email is sent for an Issue by default. As an Agent, you can use the defaults or override them to send email to other users about an Issue.

This topic covers the different kinds of email notification.

- Create/Edit Issue Email Notification
- Escalation Email
- Customer Requests

Create/Edit Issue Email Notification

The Send Email To section on the Create Issue and Edit Issue pages controls who receives email notification about the Issue. There are three parts to this section:

- **Assignees**—If this is checked, the assignees of the Issue receive email notification for this submission.
- **Contact**—If this is checked, the contact for this Issue receives email notification for this submission. This is based on the customer email address listed in the contact information for this Issue. If there are multiple email addresses defined for the contact, a link labeled Choose contact address is displayed. This allows you to select the email address to which the notification is sent. By default, it goes to the primary email address (as defined by the Workspace Administrator) unless the Issue was submitted by the customer from a

secondary email address, in which case the default behavior is to send the notification to the secondary email address.

- CC—To copy someone on this Issue, click the link for CC. A pop-up window is displayed. Enter the email address(es) to copy in the box provided (separated by spaces), select from the list of Agents, or click Select Contact to select an email address from the Address Book (does not affect the customer contact for this Issue). There are two options for CCs entered here:
  - All Changes—These users receive an email notification for each change to the Issue (unless they are removed during a later update).
  - Issue Creation Only/One-Time—These users only receive an email update for this update or submission.
- Send Survey To Customer—If you select this checkbox, a FootPrints survey is sent to the customer for this issue (the person listed as the Contact). If the administrator has set a rule governing frequency (i.e., send a survey to a particular customer no more than once every X months), this checkbox overrides that rule. This function is obedient to all other survey rules.

The FootPrints administrator can define rules for when email should be sent, what the emails contain, and which user types receive updates (e.g., Agent and customer). The check boxes for Assignees and Contact are checked or unchecked based on these rules. They may change status based on the status or priority chosen on the Create Issue page. To override the default, click the checkbox to check or uncheck it.

You may receive these email notifications for various circumstances:

- You created an Issue and assigned yourself.
- Someone else assigned you to an Issue.
- You were assigned automatically to an Issue by a rule.
- An update is made to an existing Issue to which you are assigned.
- You were copied (CC) on an Issue.

If you are assigned to an Issue and the Assignees checkbox is checked, you receive the email notification even if you are making the update yourself.

Email notifications look different depending on how the administrator configured the email templates. Different templates can be made for different types of users (Agents, customers, etc.) Below is a sample email notification.

Escalation Email

The administrator may have configured special rules to escalate certain Issues using FootPrints' Escalation feature. For example, there may be a rule that automatically raises the priority of an Issue and assigns it to a particular user based on the customer's service level. You may receive a special escalation email based on one of these rules. It may contain different field data depending on the how the administrator set it up.

NOTE

Escalation emails may also be sent to your wireless device. The administrator usually configures these to include minimal text.

Customer Requests

You may receive email notification when a customer registers a new Request to the system. These emails are similar to the regular email notification and contain all of the information about the user's Request. You can tell that it is a new submission from a user because the status is **Request** and no assignees are listed. Please check with your **FootPrints** administrator for instructions on how to process customer Requests.

Using Incoming Email

FootPrints incoming email feature allows users to submit and receive information to and from the database without logging into **FootPrints**. Your **FootPrints** administrator may have configured **FootPrints** to receive email from a certain address, e.g., support@mycompany.com. This topic covers the types of supported incoming email.

NOTE
Please check with your **FootPrints** System or Workspace Administrator to find out the email account designated for incoming submissions to **FootPrints** for your Workspace.

- Submitting Issues via Email
- Updating Issues via Email
- HTML Form
- Email Queries
- Alternate Submitter via Email
- Email for Customers

Submitting Issues via Email

If incoming email is configured, both Agents and customers can submit Issues to the system via email. Information can be included in the subject and body of a regular email or a form can be requested (see below). Each Workspace can have its own email address (support@mycompany.com, development@mycompany.com, etc.)

In addition to configuring an incoming email account for the Workspace, the Workspace Administrator must specifically allow Request and Issue creation through email. Otherwise, only updates to Issues are allowed through the email interface. This option is enabled by default.

As an Agent, the following information can be included in an email to **FootPrints**. Please check with your administrator for the correct address.

When Agents and administrators send email to the designated **FootPrints** account, the email becomes an Issue. **FootPrints** detects that the user is an Agent/administrator by the email address and automatically assigns that user to the Issue. Submissions by Agents/administrators are formatted the same way as incoming email from customers.

- **Subject**—The subject of the email becomes the Title of the Issue.
- **Body**—The body of the email becomes the Description.
- **Workspace fields**—You must include data for all mandatory Workspace fields. If you email **FootPrints** without this information, you receive an error notification email with instructions on getting Workspace field information. See below for the format.

- **Address Book fields**—You must include data for all mandatory Address Book fields. The format is described below.
- **Email address**—Your email address is recorded as the submitter of the Issue. By default, the submitter is assigned to the Issue. If auto assignment or escalation is configured, other users may be assigned by the system in addition to or instead of the submitter. To designate a customer or other user as the submitter of the Issue, include the email address in the body of the email in the form: sender=jsmith@widget.com.
- **Priority**—The default priority is automatically assigned to all new email submissions. To define a different priority, include the line Priority=*X* on a separate line in the body, where *X* is the priority.
- **Status**—By default, Issues submitted via email by Agents get a status of Open. To define a different status, include the line Status=*x*, where *x* is the status.
- **Assignees**—To define assignees, include the line Assignees=X, where X is the user ID of the assignee. For complete details on using this function, refer to *Updating Issues via Email*.

To submit Workspace or Address Book field information:

1. In the body of the email, include a line for each Workspace field, Address Book field, Priority or Status field to be submitted.

   The Workspace field data must be in the form:

   fieldname=data

2. For example, if the name of the field is Problem type, and the data is Software, then the line should be:

   problem type=software

NOTE

By default, FootPrints assumes that the data is contained on one line only. For multi-line data, the form is:

fieldname=data
data
data
END *fieldname*

To specify a value for a checkbox field, use the words specified for the checkbox, i.e., On and Off (which default to On and Off, but can be changed). For example, if you have a field called Customer Satisfied and the checkbox values are Yes and No, to indicate that the checkbox is checked, include Customer Satisfied=Yes in the body of the email.

Data submitted to checkbox or multi-select fields is validated against the permitted data values for those fields; incoming emails are rejected if the data values are not in the list. example: the field 'Color' has values 'red', 'blue' and 'green' in the workspace. If the incoming email has a line of 'Color = black', this email will be rejected.

Multi-select fields with multiple values must be semi-colon delimited. For example: 'Colors i like = red;green;blue'

3. By default, the Issue is entered into the default Workspace for incoming email or to the Workspace defined for that particular email account. To submit an Issue to a different Workspace, the following line must be included in the subject of the email:

    PROJ=*n*

    where *n* is the Workspace number. You can obtain the Workspace number by submitting the listworkspaces email query.

NOTE

When populating date and date/time fields in email, the field data should be provided according to the user's date format: American, European, or ISO. If the user has not set a format for himself or herself, then the data should be provided in the format of the system default. For date/time fields, enter the time in the form hh:mm. That is, after the date is entered (e.g., 03/04/2006), leave a space and then enter the time (e.g., 03/04/2006 14:45). When submitting a time via email, it is always submitted using a 24-hour clock.

Incoming email requests are checked for errors by **FootPrints**. Data that is incorrectly formatted is not lost; it is added to the Description. For example, if the name of a Workspace field is misspelled, that line is placed in the Description of the request. **FootPrints** also checks for invalid data. For example, if text is submitted for an integer type field, **FootPrints** does not create the request and replies to the user with an error message email.

Updating Issues via Email

In addition to creating new Issues, existing Issues can be updated via email. You can respond to a **FootPrints** email notification and have your response threaded to that Issue. Fields like Priority, Status, and custom fields can be updated as well.

FootPrints automatically appends incoming email to the correct Issue in the correct Workspace. The Workspace ID number and Issue number are included in the subject of all **FootPrints** notification email. You can reply to the mail, leaving the subject intact (and including new information at the top of the email), and the reply is automatically appended to the correct Issue in the correct Workspace. In this way, an Agent and customer can have an email conversation that is seamlessly tracked by **FootPrints**.

To respond to an email notification:

1. In your email reader (Microsoft Outlook, Lotus Notes, etc.), Reply to reply to a **FootPrints** email notification.
2. Type your response above the line that states **When replying, type your text above this line**. In this way, **FootPrints** only takes the latest information that you add, eliminating duplication in the Description. You must enter your reply above this line. **FootPrints** does not append anything below the line to an Issue.
3. Do not touch the subject of the email; it contains important information about the Issue and Workspace IDs and is needed by FootPrints to update the correct Issue.
4. To update fields (optional):

- **Update priority**—Must be in the form Priority=*n* (included in the body of the email), where *n* is the new priority.
- **Update status**—Must be in the form Status=x (included in the body of the email), where *x* is the new status.
- **Update workspaces fields**—Must be in the form FieldName=data (included in the body of the email), where *FieldName* is the name of the field and *data* is the field data.
- **Update Address Book fields**—Address Book field data can be included in email submissions in the form FieldName=data (included in the body of the email), where *FieldName* is the name of the Address Book field and *data* is the field data.

- Subject—Any new information added to the subject of the mail will be ignored. Do not change the Issue and Workspace ID information in the subject, or the Issue will not be updated properly or at all.
- Update assignees—Add assignees to the assignees list using the syntax:

  assignees=+*user_ID*

  or leave out the plus sign and use:

  assignees=*user_ID*

  to add an assignee. Multiple assignees can be added by leaving a space between the user IDs, for example:

  assignees=*user_ID1 user_ID2 user_ID3*

  Subtract assignees using a minus sign, as in:

  assignees=-*user_ID*

  Subtract multiple assignees by leaving a space between user IDs, as in:

  assignees=-*user_ID1 -user_ID2 -user_ID3*

  You can also add and subtract assignees in the same email as in the following example:

  assignees=+*user_ID1 -user_ID2+user_ID3*

  where the user IDs user_ID1 and user_ID3 are added to the Issue as assignees and user_ID2 is removed from the Issue as an assignee.

  Add or subtract teams using the same syntax as for individuals unless there is a blank space in the team name. If the team name contains a blank space, enclose the team name in double quotation marks. For example, to add *Team1* and *Team 3* and remove *Team 2*, the syntax might be:

  assignees=*Team1* -"*Team 2*" +"*Team 3*"

  You can also combine teams and individuals using the syntax described above.

5. Click Send to send the update to FootPrints. The Issue is updated within a few minutes. If the email rules are configured to send email updates to the customer and/or assignees, email notification of your changes are sent.

NOTE

You can only update Issues to which you have “write” access. These include Issues to which you are assigned if you are an Agent or all Issues if you are an administrator. If CC updates are allowed, then you can update the Description of any Issue even if you are not assigned as an Agent. If the update is not allowed, you receive an error notification via email.

A sample of an email response is below. The Issue is updated with the new message that the user writes in the Description, and the Issue is closed. Note that the email program (Microsoft Outlook) inserted headers regarding the original message above the line. FootPrints detects this information and discards it. Only the new message written by the user is included. Because the user wrote Status=Closed on a separate line, the Issue is also closed. Also note that the Issue (Entry) number and Workspace ID are included in the subject of the mail. These must remain for the update to occur.

Appending Description

Customer, Agent, and Administrator users can append a new description to any existing Issue to which they are assigned.

The formatting of the email is as follows:

- **Subject**—The subject of the email must include the phrase:

  ENTRY=*n*

  where *n* is the Issue number. Anything else in the Subject is ignored.

- **Body**—The body of the email becomes the new description.

If the user is not assigned to the Issue, he/she receives an error notification email, and the description is not appended.

HTML Form

An HTML form containing the appropriate fields for a particular Workspace and the user's permission level can be obtained by sending an email to the incoming email account for that Workspace with the subject: HTML form. This allows any user with access to a Workspace to submit an Issue, without logging into **FootPrints** from any email package that supports HTML, including Microsoft Outlook Eudora, Netscape Mail, Yahoo Mail, etc.

An HTML form is automatically generated by **FootPrints** with the correct fields for each Workspace. There is no need for the administrator to create these forms. A different form is sent to Agent and customer users (identified by their email address).

For an agent to receive the customer version of the form, for example, in order to post the form for customers on a web site, enter HTML Form Customer in the subject line rather than HTML Form.

To obtain a form for a different Workspace (you must belong to the Workspace), send the HTML form request to the email account for that Workspace, e.g., support@widget.com or sales@widget.com, etc. If there is only one email account for the entire system, you can include the Workspace ID in the subject of the request, e.g., HTML form PROJ=5.

To use the form, simply fill out the fields and click the SUBMIT button.

NOTE

Field dependencies enabled for the Workspace do not appear in the email form. All Workspaces fields are displayed.

Email Queries

To receive information from **FootPrints** via email, several email queries are available. To query **FootPrints** via email, send an email to the incoming email account for the Workspace in question using one of the queries described below in the subject line.

General Queries

- **Help**—Returns this section of the help documentation (i.e., the section you are currently viewing).
- **listworkspaces**—Returns a list of Workspace names and corresponding Workspace numbers of all the Workspaces to which you belong.

Queries to the Database

The following queries return data for the default Workspace for incoming email as defined by the System Administrator. If different email accounts are defined for each Workspace, a query sent to a particular Workspace's email account returns information based from that Workspace.

To return data for a different Workspace to which you are assigned where that Workspace does not have its own email account, the line Workspace=*n* can be placed in the body of the email, where *n* is the Workspace number. It can alternatively be included in the subject line of the email in the form Proj=*n*. The Workspace number can be retrieved with the listworkspaces query. All searches are case-insensitive.

The following queries can be performed by placing the query in the subject of an email that is sent to the FootPrints incoming email account:

- getMine—Returns a list of your assignments.
- Getschema—Returns the Workspace field schema of a Workspace. This describes the Workspace fields specific to the Workspace.
- SearchFAQ "keyword"—Returns solutions based on a keyword found in the Title or Description, e.g., SearchFAQ printer.
- getTicket "number"—Displays the details of an existing Issue based on the Issue number (you must be assigned to the Issue), e.g., getTicket 235.
- getData "keyword"—Returns database Issues based on a keyword found in the Title or Description, e.g., getData Exchange. This is for internal users only. External users receive Solutions based on the keyword.
- HTML form—Returns an HTML form with all fields for Issue submission for a Workspace, e.g., HTML form or HTML form PROJ=5.

Alternate Submitter via Email

An Agent or administrator may need to submit an Issue for another user via email. This can be accomplished by including an extra line in the body of the email:

```
sender=jsmith@widget.com
```

If this line is included in an incoming email submission, the email address jsmith@widget.com becomes the submitter of the Issue, regardless of the true sender.

Email for Customers

If the administrator has enabled the incoming email feature, customers can submit Requests without logging in to FootPrints. To do so, a customer sends an email to a FootPrints email account and it is processed as if it had been submitted via the web. Information can be included in the subject and body of a regular email or a form can be requested (see below).

The field breakdown is as follows:

- Subject—The subject of the email becomes the Title.
- Body—The body of the email becomes the Description.
- Workspace fields—Customers are only required to include Workspace field information for fields that have the permission status of public mandatory. If a customer emails FootPrints without this information, the customer receives an error notification email that includes instructions for obtaining Workspace field information.
- Email address—The user's email address becomes the default submitter. Customers who submit a Request via email are also automatically linked to their Address Book contact

information based on the submitter's email address. FootPrints makes the link and places the Address Book data into the Issue record.

- Auto assignment—FootPrints' auto assignment feature allows you to specify users to be assigned automatically to Issues based on a custom choice field. New Issue and Request submissions via email can be auto assigned by including the choice field data in the body of the email submission in the form *FieldName=data*, where *FieldName* is the name of the choice field and *data* is the field data. The user(s) associated with the specified choice are automatically assigned to the Issue and receive notification email.
- The default priority is automatically given to all new email submissions
- Email addresses copied (CC) on an incoming email submission to FootPrints are automatically added to the permanent CC list for that Issue. The Agent or administrator who takes the Issue can remove the CCs.

To submit workspace or Address Book field information:

1. In the body of the email, include a line for each Workspace field to be submitted.
2. The Workspace field data must be in the form:

   fieldname=data

   For example, if the name of the field is Problem type and the data is Software, the line should be:

   problem type=software

NOTE
By default, FootPrints assumes that the data is contained on one line only. For multi-line data, a single backslash (\) must be added to the end of each line.

3. By default, the request is entered into the default Workspace for incoming email or to the Workspace defined for that particular email account. To submit a request to a different Workspace, the following line must be included in the body of the email:

   WORKSPACE=*n*

   where *n* is the Workspace number. You can obtain the Workspace's number by submitting the listworkspaces email query.

Incoming email requests are checked for errors by FootPrints. Data that is incorrectly formatted is not lost, but instead is added to the description. For example, if the name of a Workspace field is misspelled, that line is placed in the description of the request. FootPrints also checks for invalid data. For example, if text is submitted for an integer type field, FootPrints does not create the request and sends the user an error message email.

Once a Request has been submitted successfully via email, it works the same as a Request submitted via the FootPrints interface. Agents can take the Request and turn it into an Issue or the Workspace Administrator can assign it to one or more Agents.

Updates from Customers

Customers can also update an Issue via email. To reply to a FootPrints email notification:

1. In your email reader (Microsoft Outlook, Lotus Notes, etc.), select Reply to reply to a FootPrints email notification.
2. Type your response above the line that states When replying, type your text above this line. In this way, FootPrints only takes the latest information that you add (eliminating duplication in the Description). FootPrints does not append anything below the line to an Issue.
3. Do not change the subject line of the email in any way; it contains important information about the Issue and Workspace IDs and is needed by FootPrints to update the correct Issue.

4. Click Send to send the update to FootPrints. The Issue is updated within a few minutes. If the email rules are configured to send email updates to customers and/or assignees, email notification of your changes is sent.

NOTE

When appending to an existing Issue, FootPrints' incoming email feature only takes the latest information from a reply (eliminating duplication in the description).

The message:

When replying, type your text above this line.

---

appears in every FootPrints notification email. Users must enter their reply above this line. FootPrints does not append anything below the line to the Issue.

Knowledge Base

The Knowledge Base is a place to record, organize, and manage important information for a FootPrints Workspace. This can include, but is not limited to: Solutions to common problems, answers to frequently asked questions, patches, and documents. By using the FootPrints Knowledge Base feature, you can turn the past experiences of individual customers and Agents into a database of Solutions for users to search. This can assist Agents in finding quicker resolutions to recurring problems and in empowering customers to find the answers to their questions without submitting a Request.

Topics in this section include:

- About Solutions
- Create Solution from Scratch
- Create Solution from an Existing Issue
- Viewing Solutions
- Knowledge Base Search Options
- Using the Knowledge Base to Resolve an Issue
- Popularity
- Knowledge-Paks from RightAnswers (an Add-on Module)

About Solutions

The primary component of the Knowledge Base is a Solution. Some of the properties of a FootPrints Solution are:

- Workspace-based—Solutions are records which reside in the Workspace database but which have special attributes (detailed below).
- Public or Internal—A Solution can be categorized as a Public Solution, accessible to both customers and Agents, or Internal, accessible only to Agents.
- Can be Categorized—Solutions can be categorized using the Workspace fields for the particular Workspace. These categories can be used to make FAQ (Frequently Asked Questions) lists that group Solutions.

- **Generic**—Solutions contain no contact (Address Book) information.
- **File Attachments**—Solutions can contain file attachments, enabling the Agent/administrator to make patches or other documents available to users.
- **Can be Approved**—Agents can be required to receive approval before a Solution is published to the Knowledge Base or can be restricted from creating Solutions at all.

There are two ways to make a Solution:

- **From Scratch**—Solutions can be made from scratch by Agents as long as the user has permissions to do so.
- **From an Existing Issue**—When an Agent closes an Issue, a Solution can be added to the Knowledge Base with some of the information from that Issue. The original Issue remains intact; the Solution receives a new reference number.

In addition to creating solutions from scratch or from resolved Issues, Solutions can be imported into the Knowledge Base.

Create Solution from Scratch

1. Mouse over the New Issue button on the toolbar and select Add to KB from the menu that is displayed. If you do not have the Add to KB option, you do not have permission to create Solutions.
2. The Create Solution page is displayed.
3. **Knowledge Base**—Select the Knowledge Base to which to add the Solution. The Public Knowledge Base is viewable by customers and Agents. The Internal Knowledge Base is only viewable by Agents.
4. **Title**—The Title can be used for a summary or brief description of the Solution or a question (e.g., "How do I...?").

NOTE
The Title field may have a different name (e.g., Subject, Short Description, etc.)

5. **Issue Information**—Use the fields in the Issue Information section to categorize the Solution by problem type, product, etc.
6. **Description**—Use the Description field to detail the step-by-step Solution. You can use the formatting options (bullets, numbered lists, font options, etc.) to help display the Solution in the clearest possible manner.

NOTE
The Description field may have a different name (Notes, Journal, Details, etc.)

7. Use the **Spellcheck** option to review the spelling of your Solution. Because Solutions are viewable by many users, it is important for the language to be as clear as possible.
8. **Attachments**—Attach one or more files to the Solution. For example, you might attach a patch, an image file containing a screenshot, or a PDF file containing a product brochure.
9. Optionally CC one or more people. They receive a one-time email containing the Solution.
10. Click **GO**.

    If an approval is required, the Solution goes into the Pending queue, and the approvers are notified. If no approval is required, the Solution is published to the appropriate Knowledge Base.

Create Solution from an Existing Issue

1. Open the Details page of the issue you want to turn into a solution.
2. On the Details page of the Issue, click **Add to KB**. If you do not have the Add to KB option, you do not have permission to create Solutions.
3. If:
   - **the Issue is already Closed**, the Create Solution form is displayed. The form is pre-filled with data, including the latest Description for the Issue. Contact information from the originating Issue is not included.
   - **If the Issue is still Active** (i.e., Open or another active status), you are prompted to close the Issue. If Yes is selected, a Description field is displayed for adding any additional comments or a resolution before closing the Issue. After clicking **GO**, the Solution form is displayed, pre-filled with the public information from the Issue, including the latest comments added.
4. **Knowledge Base**—Select the Knowledge Base to which to add the Solution. The Public Knowledge Base is viewable by customers and Agents. The Internal Knowledge Base is only viewable by Agents.
5. **Link to Issue**—If this is checked, the Solution is linked to the original Issue. This link is only viewable to internal **FootPrints** users (not to customers).
6. **Title**—This is pre-filled with the Title of the Issue. The Title can be used for a summary or brief description of the Solution or a question (e.g., "How do I…?"). You may want to re-word the Title to better summarize the Solution; this does not affect the originating Issue.

NOTE
The Title field may have a different name (e.g., Subject, Short Description, etc.)

7. **Issue Information**—Use the fields in the Issue Information section to categorize the Solution by problem type, product, etc. These fields are pre-filled with the information from the Issue and vary depending on your configuration.
8. **Description**—The entire Description history of the Issue is pre-filled in the Description field. You may want to re-organize and format this information to create a step-by-step Solution. If you do re-organize and format the information, it does not affect the originating Issue. Use the formatting options (bullets, numbered lists, font options, etc.) to display the Solution in the clearest possible manner.

NOTE
The Description field may have a different name (Notes, Journal, Details, etc.)

9. Use the **Spellcheck** option to review the spelling of your Solution. Because the Solution is viewable to many users, it is important for the language to be as clear as possible.
10. **Attachments**—Check the box to include the attachments from the Issue with the Solution. You can also add new attachments. For example, you can attach a patch, an image file containing a screenshot, or a PDF file containing a product brochure.
11. Optionally CC one or more people. They receive a one-time email containing the Solution. By default, the assignees and contact for the originating Issue are pre-filled in the CC field. They can be removed and/or other CCs can be added.
12. Click **GO**.
13. If an approval is required, the Solution goes into the Pending queue and the approvers are notified.

16. If no approval is required, the Solution is published to the appropriate Knowledge Base.
17. Changes to the Solution do not affect the data in the original Issue. The Solution receives a new reference number.

Viewing Solutions

To view solutions, select More | Knowledge Base. There are three options for viewing solutions:

1. Internal Solutions—Select Internal Solutions from the Display drop-down list or the Workspace Totals box on the FootPrints Homepage. Internal Solutions are only viewable by Agents and administrators and usually have more detailed or technical information than Public Solutions.
2. Solutions—Select Solutions from the Display drop-down list or the Workspace Totals box on the FootPrints Homepage. Solutions are viewable by both Agents and customers.
3. Solutions from All Workspaces—Select Solutions from All Workspaces from the Display drop-down to see a list of Solutions from all Workspaces to which you belong.

When one of the options above is selected, a list of Solutions is displayed on the homepage. To view the Details of the Solution, c lick the Solution number.

Knowledge Base Search Options

Solutions can easily be searched and reported on in FootPrints. Options include:

- Keyword Search—Search the Knowledge Base for the current Workspace by keyword.
- Keyword Search of External Knowledge Bases—Submit your keyword search to external Knowledge Bases.
- Advanced Search—Search using a combination of criteria.
- FAQs—View the FAQ categories created by the Workspace Administrator.
- Report on Solutions—Create a custom formatted report of the Knowledge Base.

Knowledge Base Keyword Search

The Keyword Search (also called "Basic Search") is available by choosing More | Knowledge Base from the FootPrints toolbar. The keyword search function is in the Browse section of the Knowledge Base page.

To perform a keyword search:

1. Choose a Knowledge Base from the drop-down box (for example, FootPrints Public Knowledge Base).
2. If it has been configured, choose the Category in which to search. For example, you might choose to search just this workspace, solutions in all workspaces, or solutions in another category, such as categories that have been set up for specific company products. The word "Category" may have been changed by your administrator.
3. Enter the word or phrase for which to search in the Search Results for Keyword field.
4. Click GO. FootPrints searches all fields for the keyword (including Title, Description, and Workspace fields).

5. A list of matching Solutions is displayed in the main frame or in the pop-up window, if you are searching from an Issue page. Click a Solution to see the Details or mouse over it to see a preview, if it is displayed in a pop-up.
6. If you are searching the Knowledge Base from an Issue page, selecting a Solution from a FootPrints Knowledge Base automatically pastes the Solution into the Description field.

Keyword Search of External Knowledge Bases

In addition to searching the FootPrints Knowledge Bases, the keyword search can be submitted to popular online Knowledge Bases, including Microsoft TechNet, Adobe, and Google Groups.

To perform a keyword search of an online Knowledge Base:

1. Choose from the available online Knowledge Bases using the drop-down box. Choices may include Microsoft TechNet, HP, Adobe, Google Groups, etc.
2. Enter the word or phrase for which to search.
3. Click GO. A second browser window opens with the results of the search from the selected Knowledge Base.
4. If you are searching the Knowledge Base from an Issue page, you can copy and paste information from the external Knowledge Base into the Issue Description field if a matching Solution is found.

Knowledge Base Advanced Search

If the keyword search is not sufficient, the Advanced Search feature can be used to create searches with a combination of criteria. Click the Switch to Advanced Search link to use the Advanced Search. The options include:

1. Choose Advanced Search of Public KB to search Public Solutions or Advanced Search of Internal KB to search Internal Solutions.
2. Title—Enter a word or phrase to search for in the Title field. This field may be named something else, such as Subject.
3. Description—Enter a word or phrase to search for in the Description field. This field may be named something else, such as Notes.
4. Keyword—Enter a word or phrase for which to search. The Title, Description, and Issue Information (Workspace) fields are searched.
5. Date—If dates are specified, the search returns only Solutions either created or last edited on, before, after, or between the specified dates. For example, to return Issues created before January 1, 2005, choose created before, and fill in 1 1 2005 in the first date field, leaving the second date field blank. To search on the current date, click the Current Date checkbox. Other date ranges are also available.
6. Age—If this section is filled in, the search returns Solutions based on the specified time. Number of days and hours can be specified. Modifiers are also provided, including Greater Than, Less Than, Equal to, Greater than or Equal to, Less than or Equal to, and Not Equal to. For example, to return Solutions greater than three days old, choose greater than and fill in 3 for Days.
7. Issue Information—The fields in this section are different depending on the Workspace fields in the current Workspace. Fill in criteria (or select one or more values for a drop-down or multi-select field) for one or more fields to return Solutions that contain that data. For example, to return Issues where the platform is Windows XP, select Win XP for Platform.

8. **Order Search Results by**—Order the Solutions returned by the specified field. The orders are descending (most recent or highest first) or ascending (oldest or lowest first). By default, Solutions are ordered by reference number descending.
9. **Make title, description, etc. case sensitive (FootPrints database version only)**—Check this box to make the search case sensitive. By default, the search is case insensitive. In the SQL/Access versions of **FootPrints**, searches are always case-insensitive.
10. **And/Or**—If And is chosen, Issues must match all criteria chosen (this is the default). If Or is chosen, only one criterion must be met.
11. **Perform Search**—Click **GO** to submit the search. The results are displayed in the main window (or in the pop-up if searching from an Issue page).
12. If you are searching the Knowledge Base from an Issue page, selecting a Solution from a **FootPrints** Knowledge Base automatically pastes the Solution into the Description field.

FAQs

The FAQ (Frequently Asked Questions) categories are available to Agents when searching the Knowledge Base. These categories are created and maintained by the Workspace Administrator. The categories are defined by advanced search criteria and named and saved by the administrator. Each time a category is accessed, it returns the latest Solutions that match the criteria defined for that category.

To view an FAQ:

1. Select Frequently Asked Questions on the Knowledge Base Advanced Search page.
2. There are two lists of FAQ categories: Public and Internal. Public FAQs contain Solutions aimed at customers. Internal FAQs usually contain more detailed or technical Solutions.
3. Click the Title of the desired FAQ category.
4. The matching Solutions for that FAQ category are displayed in the main frame (or in the pop-up window if searching from an Issue page). Click a Solution to see the Details (or mouse over it to see a preview if displayed in a pop-up).
5. If you are accessing FAQs from an Issue page, selecting a Solution from a FAQ automatically pastes the Solution into the Description field.

NOTE

Public FAQ categories are also viewable by customers.

Report on Solutions

You may need to create a report of Solutions. Reports contain more search options and formatting options than the Knowledge Base searches. You can only create reports if you have the proper permissions.

To create a report of Solutions:

1. Select Reports| New Report from the **FootPrints** toolbar.
2. Choose the desired formatting options, fields displayed, etc. as described in *Custom Reports*.
3. To get the full details of the Solution, make sure to include the Description field in Step 3 (the field may have another name, such as Notes or Details).
4. Under Select Report Criteria, for Status, highlight one or more of the solution options. This limits the report to the Knowledge Base only.

5. Choose other criteria for the report. For example, to return Solutions with the word "password" in the Solution, enter password for as the keyword. **Do not specify any Address Book information**, as Solutions do not contain Address Book data.
6. Click **GO**. The results of the report are displayed new browser window.

Using the Knowledge Base to Resolve an Issue

The Knowledge Base can be used by the agent to find a Solution to an Issue while working on that Issue. This allows the agent to quickly resolve an Issue without losing any work. If a matching Solution is found, it can be imported directly in the Description of the Issue.

To use this feature:

1. On the Create Issue or Edit Issue page, select **Search Knowledge Base** above the Description field. A pop-up window appears containing the Knowledge Base search options.
2. Enter the keyword for which to search. For example, to find Solutions regarding password problems, search for the word "password".
3. Choose one of the **FootPrints** Knowledge Bases listed in the drop-down. Other Knowledge Base search features are also available from the Issue page, including FAQ categories and the Advanced Search. Refer to *Knowledge Base Search Options* for more information. To place a link in the Issue back to the originating Solution, click the checkbox.
4. Click **GO.** A list of matching Solutions is displayed.
5. Mouse-over the Titles to view the details of each Solution.
6. Click the Title of the desired Solution. If none match the current Issue, click the **Search** button to perform another search.
7. The Solution is displayed in the Description field. It can be edited if necessary. Editing the Description does not affect the originating Solution.
8. If an external Knowledge Base was searched, the results are displayed in a separate window. These results are not automatically pasted into the Description field when selected; you must copy and paste the Solution manually.
9. Make any other needed changes to the Issue and click **GO**. The Issue is updated with the selected Solution and email notification is sent to the assignees and customer if that option is chosen.

NOTE

The names of many of the fields in **FootPrints** can be changed by the administrator (Title, Priority, Status, Description, etc.), as well as the name of the records (Issue). Custom fields can also be created. For clarity, this manual always refers to **FootPrints** records as "Issues," and uses the default terms for the other field names.

Popularity

Solutions in the Knowledge Base can be ranked by popularity in virtually any search or FAQ. Popularity is determined by a survey question posed to customers each time they access a Solution. When a customer logs into **FootPrints**, and views a Solution, the question "Was this Solution useful to you?" appears, with "Yes" and "No" options. The responses are tracked and each Solution is given a Popularity rating (the higher the better).

Customers do not have read access to the ratings, but any list of Public Solutions displayed to them can be ordered by popularity (the Most Popular Solutions list displayed on the Customer

Homepage is always sorted by popularity). Agents and administrators can view the popularity rating at any time; it is included in most search results from the Knowledge Base.

Knowledge-Paks from Right Answers

To give support teams and customers immediate access to known solutions to technical issues, Numara Software offers integrated Knowledge-Paks® from Right Answers.

While you can build your own Knowledge Base using FootPrints, Knowledge-Paks expand knowledge access to hundreds of thousands of solutions for more than 150 applications. Knowledge-Pak titles cover the most popular desktop, operating system, hardware and disk utility, productivity, mail, Internet, and desktop publishing applications, from leading manufacturers like Microsoft, Lotus, Adobe, SAP, and Oracle. Agents can import solutions directly into Issues and customers can also access solutions tailored to end users.

NOTE

This feature is available as an add-on module to FootPrints and must be licensed. Please contact your salesperson for more information on obtaining a license to enable this feature.

Using Knowledge-Paks

Once enabled, Knowledge-Paks are accessed from the same pages as the FootPrints Knowledge Base:

1. On the Create Issue or Edit Issue page, select **Search Knowledge Base** above the Description field. A pop-up window is displayed containing the Knowledge Base search options.
2. To browse the Knowledge-Paks, select Browse Knowledge-Paks.
3. A list of titles is displayed in a new window. They are categorized by library (Self-Service for end user solutions and Support Analyst for more technical information), type of application, and manufacturer.
4. Select a title to view the solutions for that title.
5. When you find a title that matches the user's Issue, select Solved to import the solution into the Issue. A summary of the solution and a link to the full details are imported into the Description field.
6. To search by keyword, enter a word or phrase in the box, select Knowledge-Paks Online from the drop-down, and click **GO**. A list of matching Solutions is displayed in a separate window.
7. To search by keyword from the Create Issue or Edit Issue pages, your administrator must set up a Workspace field that is used for the Knowledge-Paks search page. Check with your administrator to see if this has been done.
8. To use the search functions from within Knowledge-Paks, select Search in the top of the Knowledge-Paks window. Knowledge-Paks are also available by selecting Knowledge Base | Search from the FootPrints Toolbar.
9. If this feature is enabled for customers, Self-Service Knowledge-Paks are also available from the Customer Self-service interface.

Chapter 5: Advanced Features

Advanced Issue Types

The Issues topics of this manual cover the basics of creating and working with **FootPrints** Issues. In addition to regular Issues, **FootPrints** supports other Issue types for improved workflow. These include Quick Issue templates, Master Issues and Subtasks, and Global Issues.

NOTE
During installation (and per Workspace), the administrator can change the default term "Issue" to another name, such as "Entry," "Call," or "Ticket." For clarity, this manual always refers to **FootPrints** records as "Issues."

The *Advanced Issue Types* section covers the different types of Advanced Issue options in the following topics:

- **Quick Issues**—Quick Issues are templates that contain pre-filled information for standard types of customer problems and Requests. For example, a Quick Issue template for Password Reset would start out pre-filled with a description of the problem, the problem categories pre-filled with Network and Password Reset, and perhaps a Status of Closed. The Agent only needs to fill in the user's contact information to submit the Issue. The Workspace Administrator can create an unlimited number of templates.
- **Master Issue/Subtask**—When a Subtask is created for an Issue, the originating Issue automatically becomes a Master Issue of that Subtask.—Sometimes an Issue needs to be separated into Subtasks to be completed by different users. Multiple Subtasks can be created for an Issue.
- **Master Quick Issues**—Quick Issue templates can be defined to create Master Issues and related Subtasks automatically, for example, to define the New Hire process. In addition, you can sequence the subtasks so that subtasks cannot be performed until other subtasks are completed. This provides another level of control over the subtask process.
- **Global Issues/GlobalLink**—Global Issues are used to designate important or frequently reported Issues that affect many users. Global Issues can be broadcast to all Agents, are displayed on the Agent homepage, and, optionally, can be displayed for customers. When a new Issue is reported with the same problem as that of a Global Issue, the Agent (and, optionally, the customer) can link the Issue to the known Global Issue (called GlobalLinks). Global Issues can be configured so that closing the Global Issue also closes the GlobalLinks at one time.

Quick Issues

Quick Issue templates can be used by all Agents of a Workspace to open Issues quickly with information that is pre-filled for that Issue type. Agents only need to fill in the customer's contact data and any other mandatory fields not already set by the template. This is a useful timesaver for common or repetitive Issues, such as password resets, requests for brochures, etc.

NOTE

The name of this feature depends on the name given to records in FootPrints for the system/Workspace. For example, if the name "Call" has been defined for records in the current Workspace, the feature is called "Quick Call" throughout the Workspace (on the Toolbar, on the administration pages, etc.) For consistency, all help files refer to the feature as "Quick Issue".

When at least one Quick Issue template has been created by the Workspace Administrator, the Quick Issue option appears on the FootPrints Toolbar for Agents in the Workspace. To use a template:

1. Select the Quick Issue from the New Issue menu on the FootPrints toolbar. For example, if a user has called in because of a forgotten password and needs it reset, select the Reset Password template. The menu displays all the available templates. If the option is not in the toolbar, there are no templates in the Workspace.

NOTE

This is only an example; the available templates depend on what the FootPrints administrator created for the current Workspace.

2. An Issue page is displayed with information pre-filled from the template. For example, the Title may be Reset Password, the Problem Type field may be set to Network, the Network Request Type field may be set to Password Reset, and the Description may contain the description and solution of the problem.
3. Select the user's contact information as you would when creating a regular Issue.
4. Fill in any mandatory fields (indicated by the red asterisk) that are not already pre-filled, as well as any optional fields desired. Email settings follow the rules for the Workspace.
5. Make any changes or additions to the Description (or any other fields) needed if the customer's Issue has special circumstances. Please check with your FootPrints administrator or your supervisor for guidance on what may be changed. These changes only affect the current Issue; the Quick Issue template is not affected.
6. Click **GO** to submit the Issue.
7. The Issue is created. If the status in the template was set to Closed, the Issue is closed automatically. If this Issue is active, it is automatically placed in the queue of the assigned Agent(s). If email notification is enabled for Assignees and/or the customer, notifications are sent.
8. If the Quick Issue template was a Master Quick Issue, one or more Subtasks are also created automatically without user intervention.

Issues created with the Quick Issue template are like any other regular Issue after they are created. They can be edited, deleted, re-assigned, etc. Escalation rules apply to them as well.

NOTE

Customers can use Quick Issue templates, however, built-in fields work differently for customers than for Agents when using Quick Issues. The only change a customer can make to a Quick Issue template built-in field that is saved when the Issue is submitted is a change to the assignee field. If a customer makes a change to a built-in field in a Quick Issue, such as a change to the Status or Priority field, the field reverts to the default when saved.

Master Issues and Subtasks

Sometimes an Issue should be split into separate Subtasks with different properties, perhaps to be completed by different users. For example, setting up a new PC contains many tasks, including installing the operating system, installing software, configuring an email client, etc. The FootPrints Master Issue/Subtasks feature allows you to create parent-child relationships between Issues for complex processes, such as the new hire process, change management, and other such Issues.

This topic describes creating Subtasks manually. For information on defining Subtasks automatically as part of a Master Issue template, refer to *Master Quick Issue Templates*.

Creating a Subtask of an Issue automatically makes the originating Issue a Master Issue, with a parent-child relationship between the Master Issue and the Subtask.

NOTE

The name of this feature is dependent on the name given to records in FootPrints for the system/Workspace. For example, if the name "Ticket" has been defined for records in the current Workspace, the parent Issue is referred to as a "Master Ticket" throughout the Workspace. However, Subtasks are always referred to as "Subtasks". For consistency, all help files refer to the feature as "Master Issue" and "Subtasks".

To create a Subtask of a regular FootPrints Issue (and turn that Issue into a Master Issue), on the Details page of an Issue, select Subtask. If this option is not available, you might not have permission to access the Issue or the Issue may already have other special properties that prevent it from becoming a Master Issue and having Subtasks. Refer to *Restrictions* for more information.

A second menu appears with the following options:

- Back—Return to the main Details toolbar
- Create Subtask—Create a Subtask of the currently displayed Issue
    - The Create Subtask page is displayed, pre-filled with some information from the originating Issue, including contact information and Issue information (Workspace fields).
    - Enter a Title for the Subtask. For example, if the originating Issue was titled Setup New PC, the first Subtask may be to Install Operating System.
    - Fill in or make changes to any contact or Issue information fields. For example, if this task must be completed within two days, fill in the Due Date field with a date that is two days from the current date. This does not affect the Due Date field for the originating (Master) Issue, only for the new Subtask.
    - Enter a Description for the Subtask. This should describe the steps needed to complete the Subtask.
    - Optionally attach any files the Agent requires to complete the Subtask.

- Assign the Subtask to an Agent or Team. Subtasks are not required to have the same assignees as the related Master Issue. In fact, Subtasks are a good way to assign a large Workspace to multiple users, defining the task for each user or team to complete.
- Email rules follow the Workspace defaults unless you override them by checking or unchecking the email check boxes.
- Click **GO**. The Subtask is created and the originating Issue is now a Master Issue.
- The Master Issue and Subtask are listed with special icons on the **FootPrints** Homepage. The related Subtasks of the Master Issue are listed on the Details page of the Master Issue. The Master Issue to the Subtask is listed on the Details page for the Subtask.
- Additional Subtasks can be create from the Details page of the Master Issue by repeating steps 1–9 above. For example, other steps in setting up a new PC may include Install Software, Configure Email Client, Configure Network Card, etc. A Subtask can be created for each of these tasks and assigned to the same Team or Agent or different Agents/Teams.

- **Link to Master** - Link this Issue to an existing Master Issue or to another Issue.
  - To **link this issue to an existing Master Issue**:
    - Select **View Master Issues** from the pop-up window. A second window with a list of existing Master Issues is displayed. The Issue number and Issue title are listed as well.
    - Click the radio button next to the Master Issue that you want to become the Master for the current Issue.
    - Click **GO**. The Master Issue number now appears in the Issue Number box of the Link to Master pop-up window. You can review the details of the Master Issue you selected by clicking on **View Details**.
    - Click **GO**. The current Issue is now a Subtask of the Master Issue you selected.
    - To link this issue to any existing Issue:
      - Enter the Issue number for the Issue to which you wish to link as a Subtask. You can select from any existing Master Issue or any regular Issue that is not a Global Issue, GlobalLink, Subtask, or Solution.
      - Click **GO**. The current Issue is now a Subtask of the Master Issue you selected.

NOTE

If you input the Issue number of an Issue that is a Global Issue, GlobalLink, Subtask, or Solution, an error message is displayed.

Viewing Master Issues and Subtasks

Master Issues and their Subtasks have special properties to help show their relationship.

- For **Master Issues**:
  - On the **FootPrints** homepage, Master Issues are listed with the Master Issue icon () to indicate at a glance that it is a Master Issue.
  - If the Issue Type field is displayed on the Homepage (selected under Preferences), the Issue is described as a Master in that column.

    - On the Details page for the Master Issue, a note indicates that it is a Master Issue and all Subtasks for that Issue are listed in a table with the Issue Number, Title, Status, and Assignees displayed for each one.
    - To view the Details of a related Subtask, click the Title of the Subtask. The view is refreshed to the Detail view of the Subtask.
- For **Subtasks**:
    - On the **FootPrints** Homepage, Subtasks are listed with the Subtask icon ( ) to indicate at a glance that it is a Subtask.
    - If the Issue Type field is displayed on the home page (selected under Preferences), the Issue is described as a Subtask in that column.
    - On the Details page for the Subtask, a note indicates that it is a Subtask and the related Master Issue for that Subtask is listed. In addition, other related Subtasks are listed, each with the Issue Number, Title, Status, and Assignees displayed.
    - To view the Details of the Master Issue, click the Title of the Master Issue. The view is refreshed to the Detail view of the Master Issue. From here, you can view all Subtasks related to that Master Issue.

Editing Subtasks

A Subtask can be edited by the Assignees of that Subtask or anyone else who has write access (Workspace Administrator, Team members, etc.) Editing the Subtask does not affect other Subtasks or the Master Issue, only the current Subtask. The one exception is when closing Subtasks (refer to *Closing Master Issues and Subtasks*).

To edit a Subtask:

1. On:
    - the **FootPrints homepage**, click the word More after the issue title and then click the Edit icon or
    - on the **Details page**, select Edit from the menu. If you do not have the Edit icon, then you do not have Edit rights to this Subtask.
2. The Edit Subtask form is displayed, pre-filled with information from the Subtask.
3. Make changes to the Subtask (see *Editing Issues* for more information).
4. Email notifications are sent to the assignees and customer contact for the Subtask, if the email checkboxes were checked.
5. If the Subtask is closed, and there are no more active Subtasks for the Master Issue, the Assignee of the Master Issue is notified. Refer to *Closing Master Issues and Subtasks* for more information.

Deleting Subtasks

Subtasks can be deleted by anyone who has delete rights to that Subtask. Deleting a Subtask does not affect the other Subtasks or the related Master Issue. Refer to *Deleting Issues* for more information.

Editing Master Issues

A Master Issue can be edited by the assignees of that Master Issue or anyone else who has edit rights (Workspace Administrator, Team members, etc.) In addition, Subtasks can, optionally, be updated automatically by editing their Master Issue.

To edit a Master Issue:

1. On:
   - the **FootPrints homepage**, click the word More after the issue title and then click the Edit icon or
   - on the **Details page**, select Edit from the menu. If you do not have the Edit icon, then you do not have edit rights to this Master Issue.
2. The Edit Master Issue form is displayed, pre-filled with information from the Master Issue.
3. Make changes to the Master Issue (refer to *Editing Issues* for more information).
4. If the Description is updated, you can update the Description of all related Subtasks by checking the box to Update all related Subtasks with this appended Description.
5. Email notifications are sent to the assignees and customer contact for the Master Issue, if the email checkboxes were checked.
6. If the Description was updated and the Update Subtasks checkbox was checked, the Subtasks are also updated and the assignees and customer contacts receive email notification.
7. Master Issues are normally not closed until after all of the Subtasks are closed. The assignee of the Master Issue can override this. Refer to *Closing Master Issues and Subtasks* for more information.

Deleting Master Issues

Master Issues can be deleted by anyone who has delete rights to that Master Issue.

NOTE
Deleting a Master Issue also deletes the related Subtasks.

To delete the Master Issue:

1. Select Delete from the menu on the Details page of the Master Issue.
2. A dialog box is displayed that prompts you to confirm the deletion. Related Subtasks are listed in the dialog. Click OK to continue or Cancel to cancel the deletion.
3. The Master Issue and its associated Subtasks are deleted.

Closing Master Issues and Subtasks

When Master Issues or Subtasks are closed, it can have an affect on the other related Issues. When all Subtasks are completed, the Master Issue can either be closed automatically or an email can be sent to the assignee of the Master Issue. It is the administrator's responsibility to configure the rule for what happens when a Master Issue or Subtask is closed. Consult with your administrator to find out what rule(s) have been set.

Updating Subtasks from Master Issue

FootPrints provides a checkbox at the bottom of the Master Issue edit page to enable you to update all subtask fields from the Master Issue page. Check the Check here to update the edited fields of this Master Issue (excluding assignees) checkbox and the related fields of all subtasks will be updated with the same information as the Master Issue.

Configuring Subtask Sequencing

Where there is more than one subtask for a master Issue, FootPrints allows configuration of a sequence for subtasks so that some subtasks cannot be closed or edited (unless the Agent has appropriate permissions) until others have been closed. There are two ways to configure a sequence:

- Specify a sequence using the administration functions,
- Agents with appropriate role permissions can set a sequence for subtasks "on the fly" as they work in a master Issue.

Refer to *Using Master Quick Issue Templates* for a description of how to set a subtask sequence from within the master Issue.

Restrictions of Master Issues and Subtasks

Because the parent-child relationship between Master Issues and Subtasks sometimes reflects a complicated relationship, and has certain rules associated with it, there are some restrictions on these Issue types:

- **A Subtask cannot be created of an existing Subtask**—**FootPrints** only supports two-level parent-child relationships. Nested Subtasks are not supported.
- **A Master Issue cannot become a Subtask of another Issue**—As stated above, **FootPrints** only supports two-level parent-child relationships. Nested Master Issues are not supported.
- **Master Issues and Subtasks cannot become Global Issues or GlobalLinks**—The Global Issue feature allows you to link similar Issues together to be solved as one (for example, a System Down failure that is reported by many users). While this feature has some similarities to Master/Subtask Issues, it is intended for a different function and has different rules. Therefore, Master Issues and Subtasks cannot become Global Issues, nor can they be linked to a Global Issue.

Master Quick Issues

Sometimes an Issue should be split into separate Subtasks with different properties, perhaps to be completed by different users. For example, the process to set up a new employee may consist of many steps, each performed by a different user. **FootPrints** Master Issue/Subtasks allow you to create parent-child relationships between Issues for complex processes, such as the new hire process, change management, and more. Subtasks can be created manually by an Agent or can be created automatically by a Master Quick Issue Template.

Using Master Quick Issue Templates

Master Quick Issue templates can be used by all Agents in a Workspace to open complex Issues quickly, with information pre-filled for that Issue type. Related Subtasks are created by the system automatically. Agents only need to enter the customer's contact data and complete any mandatory fields that are not already set by the template. This is a useful time saver to quickly handle common or repetitive multi-step Issues, such as the new hire process, change management approvals, etc.

When at least one Quick Issue template has been created by the Workspace Administrator, the Quick Issue option is included on the FootPrints Toolbar for Agents in the Workspace. Master Quick Issue templates are listed in the same section.

Subtasks can be sequenced for Master Quick Issue Templates. This means that an order for closing the subtasks can be designated and the next subtask in the sequence cannot be closed or edited until the current subtask has been closed. Subtask sequencing can be specified by an administrator or, with appropriate permissions, by an Agent on the Details page of a Master Quick Issue. A Master Quick Issue must have at least two subtasks in order to specify sequencing. The procedure for specifying a subtask sequence is below.

To use a Master Quick Issue template, follow the same procedure as for using a Quick Issue (refer to *Quick Issues* earlier in this document). When you have completed the procedure, the Master Issue is created and is automatically added to the queue of the Agent(s) assigned to the Master Issue. One or more associated subtasks are also created automatically and assigned to the appropriate users. For example, the Network Administrator is assigned to create a new network ID for the employee, the Telephony Administrator is assigned to get the employee a new phone, and the Inventory Control team is assigned to get the user a new PC. If the email setting was set to email the assignees and/or customer, email notifications are also sent for the Master Issue and Subtasks.

NOTE

The name of this feature depends on the name given to records in FootPrints for the system/Workspace. For example, if the name "Call" has been defined for records in the current Workspace, the feature is called "Master Quick Call" throughout the Workspace (on the Toolbar, in the administration pages, etc.) For consistency, all help files refer to the feature as "Master Quick Issue".

Issues created with the Master Quick Issue template are like any other regular Master Issue once they have been created. They can be edited, deleted, re-assigned, etc. Escalation rules apply to them as to any other Issue. Closure of the Master Issue is regulated by the Subtask Closure Process rule set by the Workspace Administrator.

To learn more about Master Issues and Subtasks, refer to *Subtasks*.

Specifying a Subtask Sequence from a Master Issue Details Page

You can specify a sequence for closing subtasks once you have created a Master Issue. In order to specify sequencing, the Master Issue must have at least two subtasks linked to it and the Agent must have role permission to specify sequencing. If you want to specify sequencing but cannot do it, check with your Workspace or System Administrator to determine whether you have permission.

To specify a subtask sequence from a Master Issue Details page:

1. Select the Master Issue Details page.
2. Select the tab for Related Issues.
3. Click the "Check this box to allow sequencing of Subtasks" checkbox. Drop-down boxes are displayed in the section for you to specify the sequence.

4. Use the drop-down boxes next to the subtask names to set the sequence. You can specify more than one subtask with the same number. If you do so, then either of the equivalent subtasks can be closed ahead of the other, but any subtasks that have been set to higher numbers must still wait until the subtasks with equivalent numbers have been closed. For example, you could have the first two subtasks set to "1", which means either can be closed first, but both must be closed before the subtask set to "2" can be edited or closed.
5. When you have specified the order for all of the subtasks, click the **Update Subtask Sequencing** button. The sequence is saved and will be enforced by FootPrints. The Quick Issue Template page is displayed.

Remove Subtask Sequence

To remove the sequencing of subtasks from a Master Issue Details page:

1. Select the Master Issue Details page.
2. Select the section or tab for Related Issues.
3. Make sure the "Check this box to allow sequencing of Subtasks" checkbox is not checked and then click the **Remove Subtask Sequencing** button. The sequence is removed and the page is redisplayed.

Global Issues

Global Issues are different from regular **FootPrints** Issues in that they can be used to link many common or duplicate Issues into one entity. At any one time, you may have three or four Global Issues, or you may have none at all. It is not recommended to have too many Global Issues at one time, as they might be confusing to agents and customers or may duplicate the same problem. They should be reserved for important, pervasive Issues that affect many users, such as system outages, application bugs, or virus warnings.

If an Agent has permission to create a Global Issue, there are two ways to do so:

- Create a Global Issue from the FootPrints Toolbar
- Convert a regular Issue into a Global Issue

NOTE

The name of this feature depends on the name given to records in **FootPrints** for the system/Workspace. For example, if the name "Ticket" has been defined for records in the current Workspace, the Global Issue is referred to as a "Global Ticket" throughout the Workspace. However, GlobalLinks are always referred to as "GlobalLinks". For consistency, all help files refer to the feature as "Global Issue" and "GlobalLinks".

Create a Global Issue from the FootPrints Toolbar

If an Agent or administrator knows that an Issue (such as a server crash) will soon be reported by many customers, then a Global Issue can be created from scratch to address the problem.

NOTE

Before you create a new Global Issue, it is a good practice to first check that there isn't already a similar or duplicate Global Issue. You can view Global Issues from the **FootPrints** Home page.

To create a Global Issue:

1. On the **FootPrints** toolbar, New Issue | New Global. If you do not have this option, then you do not have permission to create Global Issues.
2. The Create Global Issue form is displayed. It is similar to the regular Create Issue page, but with fewer fields and some different options.
3. **Enter a Title for the Global Issue**—This should be clearly worded and as descriptive and concise as possible. This is the Title that is broadcast to Agents and customers and appears on the **FootPrints** Homepage. Agents and customers should be able to tell from the Title whether the problem they are reporting is related to an existing Global Issue. For example, Big Problem, while it may be true, is not a good Title for a Global Issue. Server 123 is Down is a better Title. It is descriptive of the problem while being concise enough that it does not overwhelm the user.
4. **Broadcast Creation of Global Issue to All Agents in Workspace**—If this is checked (the default), all Agents who belong to the Workspace receive a broadcast message in the form of a pop-up window alerting them to the new Global Issue.
5. **Priority**—Give the Global Issue a priority just as you would a regular Issue. This becomes the default priority for all GlobalLinks associated with the Global Issue.
6. **Status**—By default, a Global Issue is created with the Open status. This can be changed on this page to another active status (e.g., Pending, Working, etc.) It is not recommended that a Global Issue begin with the Closed status, as one of the main features of the Global Issue is to Close all related Issues simultaneously when the Global Issue is closed.
7. **Issue Information**—Fill in any Workspace field desired. Mandatory fields must be filled in. GlobalLinks inherit the choices selected here.
8. **Description**—Enter a Description of the Issue. You can use this field to enter a more detailed Description of the Global Issue, including symptoms, diagnostic information, known systems affected, estimated time it will take to fix the problem, etc. This description is inherited by Issues linked to the Global.
9. **Attachments**—Attach any files you would like associated with the Global Issue. These files also link to Issues that are linked to the Global Issue. Administrators can define rules for attachments that include restrictions on size and/or file type as well as making attachments mandatory. Rules can be applied based on fields, such as the Status field, which means an attachment may be made mandatory when the status is Open, for example, but not for other statuses.
10. **Assignment**—The user or Team selected here is responsible for updating and eventually closing the Global Issues. Different users can be assigned to the various GlobalLinks that are subsequently created.

NOTE

When an existing Issue is turned into a Global Issue, **Footprints** adds the assignees from the Global Issue to the existing issue.

11. **Email**—The Agent or Team Assigned to the Global Issue receives email notification if the assignee checkbox is checked.
12. **Time Tracking**—Time tracking information only applies to the Global Issue. GlobalLinks have their own Time Tracking information.

NOTE

It is important to ensure that each current Global Issue is unique, clearly worded, and not duplicated by any other active Global Issues.

13. Click **GO**. The Global Issue is created. It is viewable to Agents on the Homepage, broadcast to Agents via a pop-up window, and optionally broadcast to customers as well (if they have permission to link to Global Issues).

NOTE

Note that contact information is not included in Global Issues. This is because Global Issues are meant to be general and applicable to multiple users. Each GlobalLink created contains the contact information for the individual user who reports the problem.

Convert a Regular Issue into a Global Issue

Existing Issues can be turned into Global Issues after they have been created. For example, a customer may report a problem and, after some investigation, an Agent realizes that the Issue is pervasive and other customers will run into the same problem.

To convert a regular Issue into a Global Issue:

1. On the Details page for an Issue, select **Global** from the Details menu. If this option is not available, you might not have permission to create Global Issues or the type of Issue does not support Global Issues (as with a Subtask, Master Issue, etc.; refer to *Restrictions* for more information).
2. Click the **Make Global** button.
3. The Create Global Issue form is displayed. Make any necessary changes to the Issue to make it Global and generally applicable. Make sure the Title is descriptive and concise, the Description is detailed, etc.
4. Note that the contact information from the Issue is not displayed. This information is not lost. When the Global Issue is created, an associated GlobalLink is also created with the originating customer's contact information.
5. Click **GO**. The Global Issue is created. It is viewable to Agents on the Homepage, broadcast to Agents via a pop-up window, and optionally broadcast to customers if they have permission to link to Global Issues. A GlobalLink is also created which includes the contact information from the original Issue.

Viewing Global Issues

Once a Global Issue is created, it is viewable by all Agents in the Workspace, as well as customers who have permission.

Global Issues can be accessed in multiple ways:

- **In the Global Issues Dashboard component on the FootPrints Homepage**—On the **FootPrints** Homepage for all Agents of the Workspace, there is a Global Issues dashboard component. Click the Title of a Global Issue to see the Details, or click the GlobalLink icon to create a new GlobalLink for that Global Issue. If there are more Global Issues than can be displayed, click More; list of all active Global Issues is displayed.
- **Select "Global Issues" from the Display Drop-down**—If this choice is selected, all active Global Issues are listed on the Homepage.
- **Broadcast Message**—When a new Global Issue is created, a broadcast message is sent to all Agents in the Workspace (by default). To learn more about that Global Issue, visit your Homepage for that Workspace and use one of the methods above.
- **Customers**—Customers can view and subscribe to Global Issues, if they have permission to do so, by selecting Global Issues from the **FootPrints** Toolbar.

Global Issue Details

On the Details page of a Global Issue, a reference to the fact that it is a Global is displayed, along with a table listing all related GlobalLinks, including Issue Number, Title, Status, and assignees of each GlobalLink.

GlobalLink Details

On the Details page of a GlobalLink, a reference to the fact that it is a GlobalLink is displayed, along with information about the related Global Issue, including Issue Number, Title, Status, and assignees.

Creating a GlobalLink

Agents and customers can link to Global Issues, creating GlobalLinks, in a number of ways. When a GlobalLink is created, it inherits many of the properties of the Global Issue, but also contains the contact information for the individual customer. GlobalLinks can all be closed simultaneously when the Global Issue is closed.

There are two ways for an Agent to create a GlobalLink:

- From a Global Issue
- From a Regular Issue

Customers can also subscribe to Global Issues, creating their own GlobalLinks.

Create a Global Link from a Global Issue

1. From the Global Issues "Scoreboard" on the FootPrints Homepage—On the FootPrints Homepage, click the icon next to the Global Issue. If there are additional active Global Issues that are not displayed, click More; the issue list is updated to display all active Global Issues.
2. From the Details screen of the Global Issue—select Global | New Global Link from the Details menu.
3. The Create GlobalLink form is displayed. It is similar to the regular Create Issue page.
4. Title/Priority/Status—These fields are pre-filled with the information from the Global Issue. There is no need to change them unless the GlobalLink has special properties (for example, the CEO has reported the problem and the Issue should receive an Urgent priority).
5. Contact Information—Select the user's contact information, as you would when creating a regular Issue.
6. Issue Information—These are pre-filled with information from the Global Issue. Make any changes needed or fill in additional fields as required.
7. Description—This is pre-filled with the description from the Global Issue. Make any changes needed. Changes to this field do not affect the Global Issue.
8. Attachments—Files attached to the Global Issue are also linked here.
9. Assignment—By default, the GlobalLink is assigned to you or to whoever is normally assigned to Issues based on problem type or other Auto-Assign/Escalation rules. The main Global Issue remains assigned to the original assignee of that Global Issue. The original assignee is responsible for closing the Global Issue, which also closes all of the associated GlobalLinks.
10. Email—The Agent or Team Assigned to the GlobalLink receives email notification if the Assignee checkbox is checked, and the customer receive an email if the Contact checkbox is checked.

11. **Time Tracking**—Time tracking information applies to this GlobalLink.
12. Click **GO**. The GlobalLink is created. It is listed on the Details page for the Global Issue.

Create a Global Link from the Details Page of a Regular Issue

Regular Issues can also be converted into GlobalLinks. To convert a regular Issue into a GlobalLink:

1. From the Details page of a regular Issue, select **Link to Global** from the Details menu. If this option is not available, it is because the Issue already has other special properties that prevent it from being linked to a Global Issue. Refer to *Restrictions* for more information.
2. A pop-up window is displayed with a list of available Global Issues to link. Select the radio button for the desired Global Issue and click **GO**.
3. The Create GlobalLink form is displayed. It is pre-filled with the information from the origination Issue, not the Global Issue. Make changes as necessary.
4. Click **GO**.
5. The GlobalLink is created. It is listed on the Details page for the Global Issue, along with the other GlobalLinks.

Updating Global Issues

A Global Issue can be updated by the assignee of the Global Issue or anyone with edit rights to it. Updating the Title, Workspace fields, priority, etc. of the Global Issue does not affect existing GlobalLinks.

The following occur when a Global Issue is updated:

- **Two important fields are updated in all associated GlobalLinks when updated in the Global Issue**:
  - **Status**—When the Status of the Global Issue is updated, the statuses of all associated GlobalLinks are also updated.
  - **Description** - When a Description is appended to a Global Issue, it is appended to all associated GlobalLinks, unless the Include Appended Description option is unchecked.
- **Email notifications are sent when changes are made to the Global Issue**:
  - When changes are made to the Global Issue, all Agents who have at least one GlobalLink linked to the Global Issue receive an email notification about the change (one per Agent, not one per GlobalLink).
  - If changes are made the Status or Description fields of the Global Issue, the customer contacts for each GlobalLink receive an email notification, provided that email notification is enabled for customers.
  - The Agent or Team assigned to the Global Issue also receives email notification for any changes.
- **When the Global Issue is resolved, it can be closed, along with all related GlobalLinks at the same time.**

Updating GlobalLinks

When GlobalLinks are updated, the originating Global Issue is not affected, nor are the other GlobalLinks. Update that affects all related GlobalLinks (to the Description or Status) must be done from the main Global Issue.

Deleting Global Issues

Global Issues can be deleted by anyone who has delete rights to that Global Issue. Deleting a Global Issue does not delete the related GlobalLinks, it only removes the links.

To delete the Global Issue:

1. Select Delete from the menu on the Details page of the Global Issue.
2. A dialog box appears prompting you to confirm the deletion. Click OK to continue or Cancel to cancel the deletion. The Global Issue is deleted. The link is removed from associated GlobalLinks, turning them back into regular Issues.

Closing Global Issues

Global Issues are used to designate important or frequently reported Issues that will affect many users, for example, a System Down failure that will be reported by many users. One of the main features of Global Issues is that when the Global Issue is closed, all related GlobalLinks are also closed and updated and the customer contacts are automatically notified via email. This feature can save time by combining the work of closing many related Issues into a single task. It also improves communication by notifying all affected users about the resolution of the problem at one time.

To close a Global Issue:

1. Select the **Edit** icon for the Global Issue you want to close on the Homepage or the Details page of the Global Issue. You must have Edit rightsf or the Global Issue to do this.
2. Change the status to Closed.
3. Enter the final resolution for the Issue in the Append Description field. Make sure the Include Appended Description in GlobalLinks checkbox is checked.
4. Click **GO**. The Global Issue is Closed, as are all associated GlobalLinks. Email notifications are sent to all Agents who have at least one GlobalLink linked to the Global Issue, to the assignees of the Global Issue, and to the customer contacts for all GlobalLinks.

Global Issues can also be closed using the homepage Quick Action dialog.

Customers Subscribing to Global Issues

Customers can view and subscribe to Global Issues themselves if they have appropriate permissions. This saves the Help Desk time by allowing customers to identify their own problems and link to a central Global Issue, rather than entering many Issues that address the same problem. Allowing customers to do so provides them with faster service, because they receive updates automatically when the originating Global Issue is updated and eventually resolved.

To view and subscribe to Global Issues:

1. On the **FootPrints** Toolbar, select **Global Issues**. A pop-up window is displayed entitled Current Global Issues. This contains a list of Global Issues currently affecting other users.
2. To view the full description of a Global Issue, click the Title.
3. To subscribe to a Global Issue, select **Subscribe**.
4. Once a customer subscribes to a Global Issue, it is listed with the customer's Requests. The customer receives email updates as the Global Issue is updated and eventually resolved. The customer can view the latest status at any time under View My Requests.

Restrictions of Global Issues

As the relationship between Global Issues and GlobalLinks has certain rules associated with it, there are certain restrictions to these Issue types:

- A GlobalLink cannot be created from another GlobalLink—You must create the GlobalLink from the Global Issue.
- A Global Issue cannot be created from another Global Issue—This would result in duplicate Global Issues. To replace a Global Issue, delete the Global Issue, then create a new Global Issue.
- A Subtask cannot be created for a Global Issue or a GlobalLink—Because Subtasks and Master Issues have their own rules and links, Global Issues and GlobalLinks cannot contain Subtasks.
- A Master Issue cannot become a Global Issue or a GlobalLink—Because Subtasks and Master Issues have their own rules and links, Global Issues and GlobalLinks cannot contain Subtasks.
- Global Issues and GlobalLinks cannot be copied and linked to other Issues or Workspaces—While regular Issues can be copied and linked to within the current Workspace or to another Workspace, Global Issues and GlobalLinks do not have this option.

Real-Time Issue Resolution

Numara Remote

NOTE

Numara Remote is an add-on module. Numara Remote supports Windows Vista on the client machine provided the client obtains a patch from Numara Software. Contact Numara Software Support to obtain the patch.

Numara Remote allows you to control a user's desktop remotely for troubleshooting purposes. FootPrints includes an email feature that can be used to send instructions for downloading and installing the Numara Remote Host application to customers.

There are two parts to Numara Remote:

- Host—The Host resides on the customer's machine, i.e., the machine to be controlled.
- Guest—The Guest is used to connect to the customer's machine and display the desktop for that user.

The Host and Guest can reside on different machines, and even on different networks, as long as they can communicate via TCP/IP (dial-up is not supported). The Host and Guest machines can also be on different platforms.

Installing the Guest on the Agent Machine

The agent obtains the Guest software by selecting Communication | Remote Control from the Numara FootPrints Toolbar and then clicking the "To download Numara Remote Guest, click here" link. The agent can then install the Guest over the web or download it to his or her computer and install it from there.

The agent performs this installation the first time he or she requires remote control. After that, the installation need not be repeated.

Installing the Host on the Customer Machine

When the agent selects the More | Numara Remote link from the Numara FootPrints Toolbar, the Numara Remote page is displayed in the main frame.

The customer must install the Numara Remote Host on his or her machine in order for the agent to use the Numara Remote Guest to control the customer machine. In order to do this:

1. Enter the customer's email address in the field provided. Optionally, enter any additional comments for the customer in the Additional Comments field.
2. Click the GO button. FootPrints sends an email to the customer containing instructions for downloading and installing the Host application.

Using Numara Remote

1. To start the Numara Remote Guest, the agent selects Start | Programs | Numara Remote Control | Guest from the Windows Start menu.
2. When the Numara Remote application is displayed, the agent then enters the customer's IP address in the Host field and clicks the Connect button.

For additional instructions on using Numara Remote, consult the online documentation that accompanies Numara Remote. To obtain the documentation, start the client and then click the Help button.

Supported Platforms and Requirements

Numara Remote Guest

- Computer and processor: 1 gigahertz (GHz) processor or higher
- Memory: 512 megabyte (MB) RAM or higher
- Hard disk: 50 megabyte (MB); a portion of this disk space will be freed after installation.
- Display: 1024x768 or higher resolution monitor
- Operating systems:
  - Windows Server 2003 Standard, Enterprise and Web Edition
  - Windows 2000 Server, Advanced Server
  - Windows XP Pro and Home
  - Windows 2000 Professional
  - Windows NT 4.0 Server and Workstation (SP4)
  - Windows Vista

Numara Remote Host

- Computer and processor: Intel Pentium processor or higher, or 100% compatible
- Memory: OS requirement plus additional 12 MB (16 MB or more recommended).
- Hard disk: Requires <= 15 MB

- Video: Any 100% VGA compatible graphics adapter supported by Windows. The Guest module requires at least 256 colors (16-bit color depth or higher recommended)
- Operating systems:
  - Windows Server 2003 Standard, Enterprise and Web Edition
  - Windows 2000 Server, Advanced Server
  - Windows XP Pro and Home
  - Windows 2000 Professional
  - Windows NT 4.0 Server and Workstation (SP4)
  - Windows Vista

Other

Smart Card Authentication to Active Directory requires that the Security Server(s), Active Directory and Active Directory domain controllers be configured properly. Active Directory must trust a certification authority to authenticate users based on certificates from that CA. As with any PKI implementation, all parties must trust the Root CA to which the issuing CA chains.

Numara FootPrints Sync

Install the Desktop Client

NOTE

FootPrints Sync is an add-on module and must be purchased separately. It is only available to Agents and Administrators, not Customers.

To install the FootPrints Sync client:

1. Select **Preferences** on the FootPrints homepage, then select FootPrints Sync (2-way) from the **Miscellaneous** tab. Select **Configure FootPrints Sync Settings**. The FootPrints Sync page is displayed.
2. Click the Download the FootPrints Sync client link on this page to access the client. You can choose to open and run the client installation or download it and run it.
3. Double-click the FootPrints Sync file (FPSync.exe) that you just downloaded to start the FootPrints Sync InstallShield Wizard. The Welcome screen is displayed.
5. Click the Next button to continue. The Program Maintenance window is displayed.
6. Click the Install button to install the client. When installation is completed, the Completed window is displayed.
7. Click the Finish button to finish the installation.

Once installation is complete, there should be two icons on your desktop, one called FootPrints Sync Setup and one called simply FootPrints Sync. In addition, the Sunc client isw displayed. If it is not, double-click on either icon to display the FootPrints Sync client. Details on configuring and using the FootPrints Sync desktop client are below.

Uninstall the FootPrints Sync Desktop Client

To uninstall the FootPrints Sync Client:

1. Start the FPSync.exe file (the same file you used to install the FootPrints Sync client).
2. Once the Welcome window is displayed, click the Next button.
3. In the Program Maintenance window, click the Remove radio button, then click the Next button. The client is removed.

Configuring FootPrints Sync Settings Within FootPrints

These settings configure how **FootPrints**:

- handles appointments made in **FootPrints** or made in the PIM,
- synchronizes **FootPrints** Issues with PIM tasks and vice versa,
- and maps contact fields between **FootPrints** and the PIM.

Some PIMs have a concept of "private" and "public" calendars, similar to the **FootPrints** personal calendar and workspace calendar. A private calendar is viewable only by the PIM owner, but the public calendar can be seen by others, with the owner's permission.

IMPORTANT

When Numara FootPrints Sync initially synchronizes FootPrints assignments with the tasks list, it takes role permissions into consideration. Only the agent's own assignments or team assignments are synchronized. However, if the agent's role only permits him or her to edit his or her own assignments through the FootPrints interface, the agent will be able to close and add to the Description field of the teams assignments through the PIM. Administrators must be aware of this if they are to restrict agents from editing team assignments and, in that circumstance, may wish to restrict use of Numara FootPrints Sync.

Enabling synchronization and defining the PIM are done in the client installation. The following options only apply when synchronization is enabled in the client.

To enable FootPrints Sync in FootPrints and open the FootPrints Sync page for configuration:

1. Select **Preferences** from the **FootPrints** homepage.
2. On the Miscellaneous tab, select FootPrints Sync (two-way). If you want to continue to use the 1-way FootPrints Sync, which only synchronizes calendar appointments with your Outlook Calendar and does so only from FootPrints to Outlook, select Manual Calendar Sync (1-way). If you choose 1-way synchronization, continue no further with this procedure.
3. Select **Configure FootPrints Sync Settings** from the FootPrints Sync section. The FootPrints Sync page is displayed.

You can select options from the FootPrints Sync page as follows:

- Appointments
  - FootPrints -> PIM—Tell FootPrints how to handle appointments created in FootPrints when writing them to the PIM.
    - Personal Appointments—Only write FootPrints personal calendar appointments to the PIM.
    - Personal & Workspace Appointments— Write appointments from the FootPrints personal calendar and the workspace calendar to the PIM.
  - PIM -> FootPrints—Tell FootPrints how to handle appointments created in the PIM when writing them to the FootPrints calendar.
    - Private Appointments—Tell FootPrints how to handle private appointments created in the PIM when writing them to FootPrints.
      - Personal Calendar Only—Write private appointments from the PIM to the FootPrints personal calendar only.
      - Personal and Workspace Calendars—Write private appointments from the PIM to the FootPrints personal and workspace calendars.

NOTE
Because FootPrints has no way of knowing when a user is one of many invitees to an appointment, if multiple invitees to a single appointment synchronize their Outlook calendars to the FootPrints workspace calendar, the same appointment will appear multiple times in the FootPrints workspace calendar. To avoid this problem, invitees (but not the originator) to such an appointment should temporarily turn off synchronization to the Personal & Workspace Calendars and, instead, synchronize only with the personal calendar.

    - Public Appointments— Tell FootPrints how to handle public appointments created in the PIM when writing them to FootPrints.
      - Personal Calendar Only—Write public appointments from the PIM to the FootPrints personal calendar only.
      - Personal and Workspace Calendars—Write public appointments from the PIM to the FootPrints personal and workspace calendars.
    - Tasks—**FootPrints Sync can write Issues to your PIM's Tasks list.**
  - FootPrints -> PIM—Tell FootPrints how to handle Issues when writing them to your PIM's Tasks list.
    - My Assignments—Writes all Issues that are assigned to you to the PIM's Tasks list when FootPrints is synchronized with the PIM.
    - Post address book and workspace fields into the description of the tasks—All of the field data elsewhere in the Issue is written to the Description portion of the Task if this box is checked.
  - PIM -> FootPrints
    - Completed/Deleted Tasks—If you mark a task as completed or deleted in your PIM, when you synchronize your PIM and FootPrints, the status of the corresponding Issue in FootPrints is changed to the status you choose from the drop-down fields:
      - Open—Status is changed to Open in FootPrints.
      - Closed—Status is changed to Closed in FootPrints.

        - [Other Statuses]—Other FootPrints statuses are displayed in the drop-down. Select one of those to determine what to do when the status is marked as completed in the PIM.
        - **Don't change Status**—Status is left unchanged in **FootPrints**.
    - **Deleted Tasks**—If you delete a task from your PIM, when you synchronize your PIM and FootPrints, the status to the status you choose from the drop-down fields:
        - **Open**—Status is changed to Open in **FootPrints**.
        - **Closed**—Status is changed to Closed in **FootPrints**.
        - [Other Statuses]—Other FootPrints statuses are displayed in the drop-down. Select one of those to determine what to do when the status is marked as completed in the PIM.
        - **Don't change Status**—Status is left unchanged in **FootPrints**.

NOTE

Lotus Notes only supports three levels of priority. When mapping priorities from FootPrints to Lotus Notes, any priorities numbered higher than 3 are mapped to 3.

- **Contacts**—**FootPrints** can write the contacts in your **FootPrints** Address Book to your PIM's Address Book. Contact synchronization requires that you have a personal Address Book search defined.
    - **FootPrints -> PIM**—Tell **FootPrints** whether to write the contacts from your **FootPrints** Address Book to the Address Book in the PIM and maps the fields in **FootPrints** to the fields in the PIM.
        - **Search drop-down**—Select the Address Book search. The results are what will be written to your PIM.
        - **Field Mapper**—If you are going to synchronize contacts, you need to configure the mapping between **FootPrints** Address Book fields and PIM Address Book fields.
            - **FootPrints Field to PIM Field**—Using the drop-down boxes, select the PIM fields that correspond to the **FootPrints** fields.

The FootPrints Sync Client

Once FootPrints Sync is installed, it places two FootPrints Sync shortcuts on the desktop:

- FootPrints Sync Setup
- FootPrints Sync

Double-click either of the shortcuts to open the client.

The first step after installation is to define the settings in the FootPrints Sync client. The following sections of this document explain the buttons on the FootPrints Sync interface and then the menu items on the menu bar at the top of the interface.

FootPrints Sync Settings

To configure settings in the FootPrints Sync client:

1. Double-click the FootPrints Sync Setup shortcut on your desktop.
2. Click the Settings button. A page is displayed for you to enter your FootPrints User ID, password, and the URL for the location of the FootPrints link. The default for this location is http://*localhost*/MRcgi/webcal/, where *localhost* is your PC or handheld device.
3. Click the Next button after you have entered the information. The Information Manager Settings window is displayed.
4. Select your PIM from the Information Manager Name drop-down list, then click the Configuration Options button. Options are:
   - Lotus Notes
   - Microsoft Outlook
   - Outlook Express
   - Palm Desktop
   - Palm HotSync
   - PocketPC Sync thru Outlook
5. Once you have selected your PIM, click the Configuration Options button. A tabbed window is displayed with options for you to configure your PIM. Not all tabs are displayed for all types of PIM. Choose your settings on each tab.
   - The following are the tabs and their options:
   - User ID—Select the User ID from the drop-down (this tab is displayed with Palm and Palm HotSync only).
   - Transfer Method—Select whether to transfer data in both directions, from the PIM to FootPrints only, or from FootPrints to the PIM only.
     - Synchronize changes both ways—When synchronizing the PIM with FootPrints, write new data in both directions.
     - Add *PIM_type* into FootPrints—Only write data from the PIM to FootPrints.
     - Add FootPrints into *PIM_type*—Only write data from FootPrints to the PIM.
   - Content—Select which data to transfer.
     - Contacts—Write FootPrints contacts into the PIM. Regardless of whether you chose to synchronize both ways or in just one direction on the Transfer Methods tab, you can only write contacts from FootPrints to the PIM.
     - Tasks—Write FootPrints Issues to the Tasks list. When synchronizing from the PIM to FootPrints, tasks synchronization changes the status field of the FootPrints Issue according to what you specified when you configured this feature in FootPrints.
     - Calendar—Write calendar appointments between FootPrints and the PIM.
   - Personal Category—Choose whether to synchronize Personal Category data (this tab is displayed with Palm HotSync only).
     - Synchronize Personal Category
     - Do not synchronize Personal Category

6. When you have configured all of your settings on the tabs, click the OK button. The Information Manager Settings window is re-displayed.
7. Click the Next button. The Synchronization Settings window is displayed.
8. Select how you want your PIM synchronized with **FootPrints**:
   - **Synchronize once each day at** *time*—Use the drop-downs to select the time of day at which the FootPrints Sync client will perform synchronization. You can still synchronize "on-demand" by clicking the Synchronize button from the FootPrints Sync client interface.
   - **Synchronize every** *hours*—Use the drop-down to schedule synchronization every X hours. You can still synchronize "on-demand" by clicking the Synchronize button from the FootPrints Sync client interface or by double-clicking the FootPrints Sync icon. Because synchronization can be demanding on the server, auto-synchronization can be scheduled with a maximum frequency of once per hour per user. If immediate synchronization is required, double-click the FootPrints Sync icon in your system tray.
   - **Synchronize when the computer is started**—If you select this option, the FootPrints Sync client will synchronize when the PC or handheld on which the client resides is booted. You can still synchronize "on-demand" by clicking the Synchronize button from the FootPrints Sync client interface.
   - **Synchronize Manually**—Synchronization only occurs when you select the Synchronize button from the FootPrints Sync client interface.
9. When you have made your choices, click the Next button. The final window is displayed.
10. Click the Finish button to complete the configuration tasks.

Synchronize

Click the Synchronize button to immediately synchronize settings between the FootPrints Sync client and **FootPrints**.

Help and Exit

An on-line help document that is specific to FootPrints Sync is displayed when you click the Help button and select FootPrints Sync Help. There is also an About FootPrints Sync option on the Help menu that contains release information.

Click the Exit button to end your FootPrints Sync session.

FootPrints Sync Menu: File

The File option on the FootPrints Sync client menu displays a drop-down menu with the following options:

- **Uninstall FootPrints Sync Client**—Uninstalls the FootPrints Sync client.
- **Reset Palm Hotsync Settings**—Resets the Palm HotSync configuration so that it no longer is configured for working with the FootPrints Sync client.
- **Exit**—Exits the application.

FootPrints Sync Menu: Options

The Options selection of the FootPrints Sync client menu reveals the following options:

- Reread PC Data on Next Sync and Reread FootPrints Data on Next Sync — FootPrints Sync uses a special technology to skip past records that already exist on the handheld. The first time a new database is processed it's much slower because FootPrints Sync must check every field. Subsequent processes are much faster, because FootPrints Sync only updates the data that has changed.

Sometimes data changes in a way that FootPrints Sync does not recognize. In other cases, reconfiguration requires a reread, like when you change the Category field or mobile phone number field in FootPrints Sync.

If you think the record count on the handheld is no longer reflecting the data record count in your Web PIM, or that the field values on the handheld do not reflect current FootPrints Sync configuration, check the appropriate Reread on the next Sync to force FootPrints Sync to reread the databases and update all fields.

Help

Click the Help button from the menu to get the About page or to access the FootPrints Sync-specific documentation.

Recurring Appointments

FootPrints Sync handles recurring appointments properly for all PIMs with one, limited exception. In the case of Lotus Notes, if a change is made in Lotus Notes to the time at which a recurring appointment occurs, the change shows up in FootPrints when it is synchronized. However, if a change is made in FootPrints to the time at which a recurring appointment occurs, the change is not reflected in Lotus Notes.

With Lotus Notes, only the most recent description is synchronized to the To-Do list, not all Descriptions.

Deleting Appointments

One limitation of Numara FootPrints Sync is that, if you have a calendar appointment with several people invited and someone syncs with the appointment, then deletes the appointment from his or her PIM, and then resyncs, the appointment is deleted in FootPrints even though it may still be relevant to the other invitees. To prevent this from happening, if someone does not want to be part of a group appointment, they should delete themselves as an invitee in the FootPrints calendar appointment and then resync; the appointment will be deleted from their PIM and the FootPrints appointment will remain.

Synchronizing “On-demand”

To synchronize the PIM and FootPrints “on-demand”, i.e., immediately, either double-click the FootPrints Synch Setup icon and then click the Synchronize button or double-click the FootPrints Synch icon.

Change Management

Change management is a process of acquiring approval for steps in that process. The steps in the process are defined as "phases". Designated approvers vote to approve or disapprove the Issue at each phase in the process.

An Issue that is in the change management approval process looks the same as any other Issue unless the Agent has been designated as an approver for that phase of the approval process. Votes by approvers are cast either within the **FootPrints** interface or via email.

Voting from the FootPrints Interface

If the Agent has been designated as an approver, extra fields are displayed on the Details page so that the approver can cast his or her vote. Approval votes are cast on the Details page.

The fields for voting are as follows:

- **Change vote**—This box is checked by default. Check the box to leave your vote unchanged. The buttons for voting are displayed when you uncheck the box.
- **Approve/Disapprove/Defer**—Click the Approve or Disapprove button to vote to approve or disapprove the Issue. Click the Defer button to acknowledge that you have seen the "ballot" and leave a comment without affecting the final outcome of the decision. If the phase does not end before you have the chance, you can go back and change your vote to Approve or Disapprove as you see fit. If you defer, you continue receiving reminder emails.

  When approval criteria have been met, the Issue is moved into another phase of the process or the process of approvals is completed. Voters may be required to vote on only one phase or multiple phases in the process.
- **End this phase - Override all voting**—Some voters may be assigned the privilege of ending the phase entirely on the authority of their vote. This is a configurable option and is not present on all ballots.

NOTE
If you cast your vote before entering comments, the vote is recorded and the Details page changes to show the result of your vote. See below for information on how to change your vote, which allows you to add comments if you voted but did not include comments at that time.

- **Extended Voting Details**—Extended Voting Details include:
  - Issue number
  - process name
  - process description
  - phase name
  - phase description
  - approval/disapproval requirements
  - list of approvers
  - next phase in the process

  - list of approval/disapproval votes, including who voted, date of the vote, and voter comments
  - list of votes cast with voters' comments
- Comments on Vote (optional)—You can enter any comments you wish in this field. Some comments you might include are the rational for your vote or, for example, if you vote to disapprove, you might include what you would require to vote to approve the Issue if it came back to you again.

Voting by Email

If approvers receive email notification when voting begins and/or recurring email reminders that a vote is pending, approvers may, depending on how the notifications are configured, be able to cast his or her vote by replying to the notification.

If you can vote by email, the email contains a line of text similar to the following:

```
[ ]Approve     [ ]Disapprove
```

To vote by email, select Reply in your mail program, enter an X between the appropriate square brackets in the reply, then send the reply. Do not alter the security ID in any way. That data is required for a successful vote.

If the email is configured to allow it, you can also enter comments in your reply along with your vote by simply typing your comments on the line indicated.

One of a set of responses is returned to email votes for both successful and unsuccessful votes, as follows:

- For successful votes:
  - 'Your re-vote for approval for [Issue: %s, Process: %s, Phase: %s] was counted.';
  - 'Your vote for approval for [Issue: %s, Process: %s, Phase: %s] was counted.';
  - 'Your re-vote against approval for [Issue: %s, Process: %s, Phase: %s] was counted.';
  - 'Your vote against approval for [Issue: %s, Process: %s, Phase: %s] was counted.';
- For unsuccessful votes:
  - 'Your vote for [Issue: %s, Process: %s, Phase: %s] was not counted. Voting for this phase ended.';
  - 'Your vote for [Issue: %s, Process: %s, Phase: %s] was not counted. The ballot was not clear.';
  - 'Your vote for [Issue: %s, Process: %s, Phase: %s] was not counted. Reason not known.';
  - 'Your vote for [Issue: %s, Process: %s, Phase: %s] was not counted. Your email address did not match our records.';
  - 'Your vote for [Issue: %s, Process: %s, Phase: %s] was not counted. This is not the correct workspace.';
  - 'Your vote was not counted. The security ID was invalid.';
  - 'Your vote was not counted. The security ID was not found.';

Override Votes—Super-approvers

A "Super-approver" is empowered to end any phase immediately on the authority of his or her vote only. A super-approver's vote overrides all other votes in the phase.

If you are empowered with super-approver status and want to end the phase on your own authority, check the End this phase - Override all voting checkbox. A warning message is then displayed. Cast your vote to approve or disapprove and the phase is ended.

When the phase ends, it follows the normal procedure configured for approval or disapproval, depending on which way the super-approver voted.

Viewing the Change Management Audit Trail

If you are a member of a role with permission to view change management history and run change management reports, a voting history is provided in addition to the three tabs that comprise the regular Issue history.

This audit trail provides a listing of all actions that were taken on a Change Management Issue and when they were taken. Only users who have permission, based on role membership, can view all of the available history information. A user without the appropriate role membership can only view the permission,

The Audit Trail page cannot be edited.

To view the change management audit trail:

1. Select the Details page of a change management Issue.
2. Go to the History section of the page. The Audit Trail page for that Issue is displayed.

Using the Audit Trail Page

When you first open the Audit Trail page, the Issue's complete history is displayed. Use the links to view different history data, as follows:

- Complete History—All activity of the Issue.
- Issue History—Actions performed on the Issue by all users and automatically by the system.
- Email History—All email activity for the Issue.
- Voting history—A history of the individual votes cast. Voting history is not shown in any other view.

The following information is maintained for all views but the voting history:

- Date—The date the action was performed.
- Time—The time the action was performed.
- User—The user who performed the action. If the action was performed by the system automatically, the escalation rule is listed here.
- Action—The action performed on the Issue, i.e. "Changed Status", "Changed Priority", "Updated Description", etc.
- Email type—For email actions, the type of mail (incoming update or outgoing email notification) is displayed and the user who made the update or received the notification.

The following information is maintained for the voting history:

- **Date**—The date the vote was cast.
- **Time**—The time the vote was cast.
- **User**—The user who cast the vote.
- **Process**—The name of the process in which the vote was cast.
- **Phase**—The name of the phase in which the vote was cast.
- **Vote**—The vote that was cast (approve or disapprove).
- **Comment**—Any comments made by the voter that were a part of the vote.

Service Catalog

Customers can use the Service Catalog to place service requests or simply view the services that are available for future reference. To view the Service Catalog, select Service Catalog from the FootPrints Toolbar. The Service Catalog is displayed.

The Service Catalog displays service categories and a Hot List. The service categories are a hierarchy that allows the services to be organized. The Hot List is a quick means of navigating to specific services.

Service Categories

Service categories are determined by the administrator and may contain subcategories to any number of levels. To view services, you have to click the appropriate service category, and perhaps continue clicking on subcategories until you get to the one you want. For example, you may want to find a service in the IT Services department dealing with a business application. To select the category, you would click on IT Services and then Business Application Services. There you would find a list of services. Clicking on the service reveals the details of the service. From there you may submit a service request for that service using the Service Request Template provided.

Hot List

The Hot List is a list of services that it is useful to access quickly. The Hot List is displayed when you click the Service Catalog button on the same page as the service categories. Rather than go through the process of drilling down through the service categories, a customer can click on a service in the list to view the details. From there, the customer can submit a service request using the Service Request Template.

Submitting a Request Via Service Catalog

Requests for services are submitted in substantially the same way as any other FootPrints request once you have determined which service you want. To submit a request:

1. Select Service Catalog from the FootPrints Toolbar. The Service Catalog page is displayed.
2. Either:

   Drill-down through the service categories until you find the list of services

   or

   Locate the service you want to request in the Hot List.
3. Click on the service you want to request. The Details page of the request is displayed.
4. Click the SAVE button. The service request is submitted.

Chapter 6: A Sample Issue from Request to Resolution

What follows is a sample "journey" of an incoming user Request that is taken and worked on by an Agent user, and finally closed and turned into a Solution. This is only one of many possible routes, depending upon how FootPrints is configured.

1. Jane (a Customer) logs into FootPrints, enters her FootPrints User ID, and submits a new Request.
2. Jill (an Agent user) logs into FootPrints, and chooses "Requests" from the FootPrints Dashboard component.
3. Jill clicks on one of the Requests to review the details.
4. After reviewing the details, Jill decides she can handle this Request, and clicks Edit from the Details toolbar to take the request.
5. When Jill clicked the Edit button, the Status changed to "Open", and the Request becomes an Issue assigned to Jill, who now works on the Issue. She gives it a priority of "Medium". She appends a new Description stating that she is researching Jane's problem. She clicks GO to save her changes.
6. The Issue now appears in Jill's "Assignments" list.
7. After researching the Issue, Jill enters a possible resolution to Jane's problem (by appending the Description of the Issue). Jane receives an automatic email with Jill's suggestion.
8. Jane receives an email notifying her that the Issue is being worked on, including the possible solution. She can also log into FootPrints to check the status of her Issue.
9. Jane replies to the FootPrints notification email, stating that Jill's suggestion worked!
10. Jill then closes the Issue by changing the status to Closed.
11. If Jill feels that Jane's Issue is a common problem, she can make her Issue into a Solution. On the Details page of the Issue, she clicks the Add to KB button. She cleans up the spelling, and then clicks the GO button to create the Solution.
12. All Customers (as well as Agent and Administrator Users) can now view, search, and report on the new Solution.

Conclusion

You are now ready to being using FootPrints! The Online help is always available from FootPrints to provide additional information. Advanced features and administrative functionality are documented in the Numara FootPrints Administrator's Getting Started Guide and the Numara FootPrints Reference Manual.

If you have any questions regarding Numara FootPrints, please contact Numara Software's Support Team at 800.222.0550 (US and Canada) or send an email to footprints.support@numarasoftware.com. The Support Team is available between the hours of 9am and 5pm Eastern Time. For our International users, please contact your local distributor.

You can always visit our website, www.numarasoftware.com/tech.html, at any time and search the FootPrints knowledge base, browse our FAQs, or submit a Request.

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