

SPOTS®

Service and Problem Tracking System



Administration and User Guide

LegendSoft, Inc.

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I. Introduction

A. *How to Use this Document*

This document should be used by SPoTS[®] account administrators, users, and those evaluating the functionality provided by the system. It should be used as a reference guide and begins with the *What Is* section, which contains definitions of basic entities and concepts utilized by SPoTS. If you are unfamiliar with problem tracking or trouble ticketing systems, begin with this section. If, on the other hand, you are an experienced system administrator you may want to skip ahead to Section IV – Application Architecture. This section will provide you with a “bird’s eye” view of the system and how it functions. Refer to other sections in the document as you make your way through the Application Architecture. Once you’ve registered for an account, you can begin using the *How To* sections as a tutorial in customizing your account.

B. *Purpose of SPoTS (Service and Problem Tracking System)*

True to its name, SPoTS is used to track service requests and/or problems encountered in your day-to-day business operations. The system is built so that you can configure it to suit your needs. It can be easily adapted for numerous business purposes.

Using SPoTS to help in the management of your operations will enable you to provide better customer service and higher quality products, both of which will help you gain an advantage against your business opponents in today’s hypercompetitive marketplace.

C. *History*

For many years LegendSoft, as software consultants, used ad-hoc systems built by our clients to track requirements, defects, and problems encountered in the process of developing system software. Some of these systems were created using non-server based database products such as Microsoft Access. Others were based upon Microsoft Excel or loosely implemented e-mail based systems using forms and manual procedures. These systems and processes were similar in several unfortunate ways, namely they lacked the robustness and flexibility required to support long-lived projects and our clients’ disparate business models and associated processes and products.

SPoTS was designed and built from the bottom up to address these shortcomings. SPoTS is designed to support long-term projects and your ongoing business practices. We specifically created SPoTS so that it could be easily adapted to suit the needs of small and medium sized businesses in numerous industries.

II. ASP / SaaS Model

SPoTS is a system usually classified as an ASP or SaaS product. “ASP” is an acronym for Application Service Provider. “SaaS” is an acronym for Software as a Service. This means that LegendSoft hosts the system for use by customers over the Internet. As such, it is built using state of the art J2EE (Java 2 Enterprise Edition) technologies and IBM’s enterprise-class DB2 database servers. SPoTS can support an extremely large number of users because the system scales horizontally. When necessary LegendSoft adds database, application, and/or web servers to accommodate our customer base and maximize system performance. This not only ensures rapid response time but also high availability. SPoTS is fully redundant, meaning that in the event of a hardware failure, one server will pick up where the failed server left off.

Because SPoTS is accessed exclusively via the Internet, we house our equipment in a state-of-the-art data center. SPoTS has multi-homed Internet connectivity ensuring that if one telecommunications carrier experiences a failure, SPoTS is still accessible through another carrier. Our data center also

has redundant power supplies and diesel generators in the event of short-term or long-term power outages.

A major advantage of our ASP model is our ability to provide you with the latest versions of our software in a very short timeframe. We continually upgrade our site with enhancements and any necessary code changes to ensure your experience using SPoTS is always superior.

Our ASP model also frees you from time-consuming computer installations and maintenance. In a way, our ASP model provides you with your own IT department.

III. The What-Is Section

This section is intended to provide you with an understanding of some basic concepts and components used within SPoTS. If you are an experienced system administrator you may want to skip forward to the section entitled *Application Architecture*. You can always refer back to this section if you encounter a concept with which you are unfamiliar. All other users should review this section.

A. *What is an Account?*

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users. It describes the concept of a SPoTS account. (The term *account* is interchangeable with the term *company* in this document and when using SPoTS.) There are no essential prerequisites for this section, but you may want to refer to the section entitled *Application Architecture* to understand how service orders, projects, and customers are associated with one another inside your SPoTS account.

A company or account is your own area within the SPoTS system. An account is created specifically for your use when you register for it at www.TroubleTicketSoftware.com. When you login to the system, you specify your *Company* name. Your company name is the key that identifies your account. Each account within the system is completely autonomous. You can create as many users, projects, customers, and service orders within your account as you need. Additionally, you configure the security within your account to provide your users and customers with an appropriate level of access to support your particular business needs. All licensing you purchase is at the account level. That is, if you purchase 10 licenses, this allows 10 of your users to simultaneously access your account.

For instructions on the registration process required when creating an account, please refer to the section entitled *How to Register for an Account*.

B. *What is a Service Order?*

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users. It describes the concept of a *service order* or *trouble ticket*. (In this guide, we use "service order", "trouble ticket" and "ticket" interchangeably.) There are no essential prerequisites for this section, but you may want to refer to the section entitled *Application Architecture* to understand how service orders are associated with projects and customers within your SPoTS account.

In SPoTS a service order is used as a tracking mechanism. Depending upon your business, a service order can be configured to represent different things. For example, if you operate a chain of restaurants, you might use service orders to track maintenance problems at each of your restaurant locations. In this scenario, one of your employees is most likely responsible for addressing these

maintenance problems and dispatching maintenance personnel or vendors to each location to correct the problem. Tracking these maintenance problems can become difficult and time consuming when managing many locations.

SPoTS is designed to help in the efficient management and resolution of problems and service requests. In the example given above, you might provide each restaurant manager a username and password for access to your SPoTS account. When a problem arises, the restaurant manager can login to the system, create a service order, and assign it to your facilities manager. Your facilities manager will be notified of the new trouble ticket via e-mail and he/she can then reassign the ticket to the appropriate maintenance personnel or vendor. Once the problem is resolved, the ticket will be updated with the appropriate information and marked as *resolved*. This information is stored in your account indefinitely, where you and your account users can access it.

If the same chain of restaurants wanted to track customer complaints using SPoTS, the information stored in the system over a period of time can be used to create statistical reports. These reports can then be used in determining those restaurant locations providing the best and worst service.

A service order has many data elements. For example, a service order has a single *summary* field used to provide a concise description of the ticket. Users can then add supporting information to the service order by adding *description* entries. Users may also add one or more *comment* and *resolution* entries to each service order. Additionally, you can attach documents (Word, Excel, PDF, etc.) to a service order. On the summary page of a ticket are several other fields referred to as *attributes*. These attributes can be configured to track attributes of the service order such as its priority and status. All of this information can be collectively used to help resolve the service order. A standard view of a service order is shown below.

Figure III-1

The screenshot displays the SPoTS web interface for a service order. At the top, there is a navigation bar with links for home, main menu, switch projects, logoff, cust search, company report, project report, new service order, new customer, and service order search. The current project is 'Property Management'. The service order number is 12, and the author is TucsonTenants. The page is divided into several sections: 'Report Service Order To' (Group: Management, Individual: N/A), 'Apartment Number / Contact Info' (John Davis), 'Date Opened' (Sunday, September 25, 2005 4:15:04 PM), 'Date Resolved', 'Last Group Escalation' (Priority: 4 - Standard, Reported By: TucsonTenants, Tenant History: N/A, Unit Type: N/A, Current Balance: N/A, Due Date:), 'Last Project Escalation' (Order Type: Parking, Current Status: New, Internal Priority: N/A, Reported Version: N/A, Resolved Version: N/A), 'Summary' (limited to 255 characters) containing the text 'There has been an (abandoned?) car parked in space 45c for two weeks. I don't recognize the vehicle.', 'Billing' (Billable Item Entries: 0, Billable Item Quantity: 0, Total Billable Cost: \$0.00), and navigation buttons for Update, Delete, Reset, Previous, and Next. The footer indicates copyright 2002-2007 LegendSoft, Inc. All rights reserved.

For more information about how a service order or ticket is associated with projects or customers within your account, refer to the section entitled *Application Architecture*.

C. *What is a Project?*

1. **Intended Audience, Prerequisites, and Overview**

This section is intended for all users. It describes the concept of a *project*. There are no essential prerequisites for this section, but you may want to refer to the section entitled *Application Architecture* to understand how projects are associated with service orders and customers within your SPoTS account.

A project is a way in which to provide a logical grouping of service orders / trouble tickets. All service orders must belong to a project. There is a one-to-many association between projects and service orders. That is, a project can contain many service orders, but one service order cannot belong to more than one project.

When configuring your account you can use projects to provide a logical grouping of tickets that resembles the way in which you do business. For example, if you are a manufacturer of aquarium equipment, you might create projects named "SeaView 30", "OceanFilter 350", and "Torrent 2000" to reflect the three products that you sell. Creating projects in this fashion allows you to track problems with each product.

If your business is service-based, you can create projects to track each of your services. For example, if you run a landscaping business you might provide the following services to your customers:

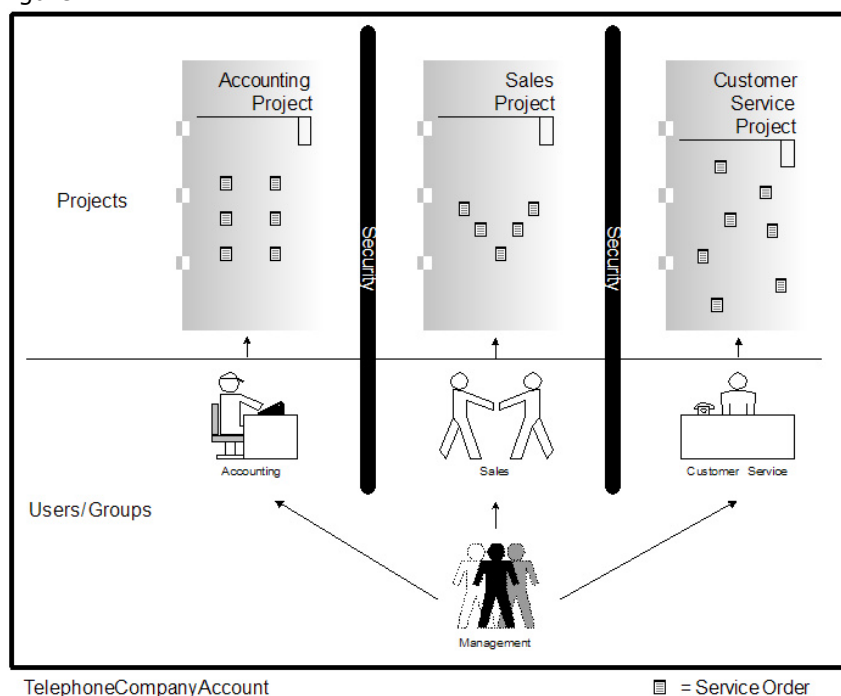
- Landscape architecture
- Fertilization
- Irrigation systems
- Lawn mowing
- Tree removal

In this case, you can create a project for each of these services. If a customer calls in to have a tree removed from their property a corresponding service order can be created in the "Tree Removal" project. If the same customer later calls to obtain a quote for the installation of a sprinkler system, an order would be created in the "Irrigation Systems" project, and so on.

Projects can also be used to track issues within individual departments of your company. For example, a local telephone utility could create projects named "Sales", "Accounting", and "Customer Service". The sales department could then use their project to track sales leads or requests for quotes, the accounting department can use their project to track customer inquiries into their bill, and customer service can use their project to track requests for technical support.

Within your SPoTS account, projects are a key factor in generating reports. In the telephone company example provided above, it probably isn't terribly useful to run a company-wide report of all unresolved service orders. However, if you are a manufacturer tracking problems for each of your products, an account-wide report can help you determine which products suffer from below-average quality. Similarly, the landscaping company might run a report to determine which of their services is generating the most customer interest.

Figure III-2



Projects are also a key factor in the security setup of your account. Each project (and its associated service orders) can be secured separately. Through project security settings you can configure one or more groups or individuals to have one of the following access levels to any project:

1. Full access
2. Read-only access
3. Deny all access

Put another way, you can provide full project access, read-only project access, or deny all project access to a subset of your users. Again using the telephone company example, each project could be configured to prevent certain users in different

departments from accessing the other department's project so that, for example, customer support representatives could not access the "Sales" or "Accounting" projects yet management is provided full access to all projects.

D. What is a Customer?

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users. It describes the concept of a *customer* in SPoTS. There are no essential prerequisites for this section, but you may want to refer to the section entitled *Application Architecture* to understand how customers are associated with service orders and projects within your SPoTS account.

A customer is a data entity used within SPoTS to track information about your clients. Note that your clients may be internal, as would be the case if SPoTS is used by your internal help desk or external, as would be the case if you use the system to track customer complaints. A customer entity has fields for your client's name, address, telephone numbers, web site, contacts, etc. Additionally, you can create one or more notes for a customer. A customer note is a free-form text entry created by your account users to record a history of their interaction with your client. These notes can then be accessed by other users to understand, for example, why a customer has called your customer service desk or opened a service order in the past.

A customer is also a way in which to provide a logical grouping of service orders / trouble tickets. Although it is not required, a service order can be associated with a particular customer. This functionality is essential when servicing a particular client and understanding the issues encountered by the client in the past. Service order reports can be created and accessed to identify all tickets for a particular customer. Statistical reports can be created to identify customers for whom an inordinate number of service orders have been created over a specific period of time.

E. What is a User?

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users. It describes the concept of a *user* in SPoTS. There are no essential prerequisites for this section, but you may want to refer to the section entitled *Application Architecture* to understand how users are associated with service orders and projects within your SPoTS account.

Quite simply, a user is an individual who logs into the system for the purpose of creating, viewing, or editing customer information or service orders. A user is identified in SPoTS by their *username*. When logging into the system, you must specify your username along with your account / company name and password.

A service order has three different fields that utilize a user's username:

1. The *author* field.
2. The *reported by* field.
3. The *reported to individual* field.

The author field is automatically assigned by the system at the time of service order creation. Once the service order is created this field cannot be changed. The field indicates which of your account users actually created the ticket.

When initially entering information for a new service order, the *reported by* field defaults to the username of the author. However, prior to its creation, the author can change the *reported by* field to another username. This allows the author to create a service order on behalf of another user.

Every service order must be reported to either an individual or a group. If a service order is assigned to an individual, then the author must set the *reported to individual* field to the appropriate username.

When creating a username you can enter information associated with that person including their name, description (i.e. title), phone number, location, time zone, customer association, and e-mail addresses. Changing a user's time zone will cause all times shown in the system to be displayed in the user's local time. Because a user may have multiple e-mail addresses (i.e. work, home, Blackberry, etc.), the system will allow you to configure all of those addresses with the username. If e-mail addresses are configured, a user will receive automatic e-mail notifications of new service orders when a service order is assigned to them.

There are two types of users, a standard user and a portal user. Standard users are typically internal to your company and portal users are typically external users such as your customers. For more information regarding portal users please refer to the section entitled *What is the Self-Service Portal*.

F. What is a Group?

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users. It describes the concept of a *group* in SPoTS. There are no essential prerequisites for this section, but you may want to refer to the section entitled *Application Architecture* to understand how groups are associated with service orders and projects within your SPoTS account.

A group is a collection of system users. For example, if you have several departments within your corporation, you may want to group your users according to their department. So if one department within your company is IT Support, you may want to create a group by the same name. Then, if a user is experiencing a problem with their PC, a SPoTS trouble ticket could be created and assigned to the IT Support group.

A service order must either be assigned to a group or an individual.

Note that only groups so designated will appear on the Self-Service Portal. This allows you to create special groups whose purpose is to interface with external parties (i.e. your customers, vendors, etc.). For more information regarding the Self-Service Portal, please refer to the section entitled *What is the Self-Service Portal*.

G. What is a Group Contact?

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users. It describes the concept of a *Group Contact*. Prior to reading this section you should first read the sub-sections entitled *What is a Service Order* and *What is a Group*.

A service order can either be assigned to an individual user or a group. A single username may be a member of multiple groups. However, if a user is a member of multiple groups that person may not necessarily want to receive automated notification e-mails for all of those groups.

For example, a particular user may be a member of 10 different groups for security purposes. If automated e-mail notifications were indiscriminately sent to all group members and service orders were being actively created and assigned to each of those 10 different groups, the user could easily be overwhelmed with automated e-mails.

To address this problem, SPoTS incorporates the concept of a *group contact*. When a new service order is created and assigned to a group, only those users who are designated as the group's contacts will receive an automated message notifying them of the new ticket.

The most common scenario in which to employ the use of a *group contact* is when a single person, usually a manager, is coordinating the assignment of service orders among his team members. The group's manager can be setup as the group contact. After receiving each e-mail notification of a new ticket, the manager can reassign the ticket to the appropriate individual in his group. This person will then, in turn, receive an e-mail notification of their own. This prevents the confusion that might occur if all group members received notification of all new tickets assigned to their group.

H. What is a Project Contact?

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users. It describes the concept of a *Project Contact*. Prior to reading this section you should first read the sub-sections entitled *What is a Service Order* and *What is a Project*.

It is often required that the individuals managing a project be frequently updated with the status of their project. To help facilitate this requirement, SPoTS employs the concept of a *project contact*.

A project contact is a user that will receive an e-mail notification anytime a new unresolved service order is created in their respective project.

I. What is a Service Order Attribute?

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users. It describes the concept of a *Service Order Attribute* in SPoTS. You should be familiar with the concept of a *service order* prior to reading this section. Please refer to the section entitled *What is a Service Order* prior to reading this section.

Service orders can be configured to suit your business needs. In SPoTS service order fields are referred to as *service order attributes*. Names of these attributes are referred to as *attribute labels*. Values contained in the service order attribute listboxes are referred to as *service order attribute listbox entries*. Examples of some service order attribute labels might be "Category", "Priority", "Severity", "Status", and "Type". (For instance, a service order might have a status of "Open" or "Closed" and a priority of "High" or "Low".)

Figure III-3

The screenshot displays the SPoTS web interface for a service order. At the top, there is a navigation bar with 'back | close window' and 'Current Project'. Below this, the company name 'Demonstration Company' is visible, along with tabs for 'Summary', 'Descriptions', 'Comments', 'Resolutions', 'Attachments', 'History', and 'Property Management'. The main form area contains the following fields and options:

- Service Order Number:** 12
- Service Order Author:** TucsonTenants
- Report Service Order To:** Group: Management, Individual: N/A. Radio buttons for Group (selected) and Individual.
- Apartment Number / Contact Info:** John Davis
- Date Opened:** Sunday, September 25, 2005 11:15:04 AM
- Date Resolved:** (empty)
- Group Escalation Date:** Priority: 4 - Standard, Reported By: TucsonTenants, Tenant History: N/A, Unit Type: N/A, Current Balance: N/A.
- Project Escalation Date:** Order Type: Parking, Current Status: New, Internal Priority: N/A.
- Reported Version:** N/A
- Resolved Version:** N/A
- Due Date (yyyy-mm-dd):** (calendar icon)
- Customer:** Omni Property Management
- Buttons:** Unresolved (selected), Resolved, e-Mail This Service Order
- Summary (limited to 255 characters):** There has been an (abandoned?) car parked in space 45c for two weeks. I dont recognize the vehicle.
- Service Order Contents:** Descriptions: 0, Comments: 0, Resolutions: 0, Attachments: 0, History Records: 0
- Buttons:** Update, Reset

In the figure above, configurable service order attributes are outlined in red. Attribute labels are outlined in green. Service order attribute listbox entries are outlined in light blue. All of the outlined attributes, attribute labels and attribute listbox entries can be changed to accommodate your business needs.

J. What is a Service Order Template?

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users. It describes the concept of a *Company Service Order Template*. Prior to reading this section you should first read the sub-section entitled *What is a Service Order Attribute*.

SPoTS allows you to customize your account in many ways to suit your business needs. In particular, a service order (also referred to as a "ticket" or "trouble ticket") can be customized on a project-by-project basis.

As an administrator you could, for example, create one project to track maintenance problems with disparate manufacturing facilities and another project to track product enhancement requests from your customers. To enable such dissimilar projects to meet their respective business needs, SPoTS allows you to customize service orders for each project.

Now imagine that you want to create separate projects to separately track enhancement requests for each of five different products. Each of the projects would most likely be configured in a similar fashion. That is, most of the service order attribute labels and listbox entries would be the same for these five projects. To reduce the amount of work required in the creation of each project, you can use the functionality of a service order template.

The service order template for your account should be configured to contain all common attribute labels and attribute listbox entries. At your option, this template can then be used as the basis of the configuration for new projects. Each new project that you create based upon the template will inherit all the attributes of the service order template, thereby greatly reducing the amount of configuration required for each project.

K. What is the Self-Service Portal?

1. Intended Audience, Prerequisites, and Overview



This section is intended for all users. It describes the concept and functionality of the SPoTS Self-Service Portal. There are no essential prerequisites for this section.

The Self-Service Portal is intended to function just like an old-fashioned customer service counter. For example, when you have a problem at your local Home Depot store, you typically walk to the customer service counter to obtain assistance. The customer service counter is your interface to the back-office operations of Home Depot. Home Depot personnel can provide you with more help at the customer service counter than can be provided at the check-out register. These personnel may be better trained and have better access to back-office systems to service your needs. Even though Home Depot customers are able to obtain more help at the customer service counter, the customers are still not allowed behind the counter! There is a definite barrier between the customer and the employee, namely the counter. Customers are not allowed behind the counter for obvious reasons of

security and confidentiality.

In a similar fashion, you might wish to provide your customers or vendors with an interface to your back-office (e.g. your SPoTS account). Yet, you still have a need to provide a confidentiality and security barrier between your employees and your customers. The Self-Service Portal provides both an interface and a barrier.

Through the portal, an external customer or vendor can create, view, and modify trouble tickets / service orders. However, their access to your account is greatly limited. The list below contains functionality available to portal users:

- Portal users can create a ticket / service order.
- Portal users can modify an existing ticket / service order.
- Portal users can be restricted to view only those tickets whose *Reported By* field is equal to the portal user.

The following list contains key functionality specifically not available to portal users:

- Portal users cannot access customer information.
- Portal users cannot switch between projects. (Each portal user has access only to the specific project assigned by your account administrator.)
- Portal users cannot run reports.
- Portal users cannot perform searches.
- Portal users can assign new tickets only to groups designated as visible to portal users.
- Portal users have access to only 3 of 12 fields on the service order summary page.
- Portal users have no access to service order comments.
- Portal users cannot create service order resolution entries.
- Portal users cannot access Billable Items.

You can seamlessly integrate the Self-Service Portal with your company's own web site by configuring your own logo to be displayed in the upper left-hand portion of the browser. It is also easy to add HTML links from your web site to your SPoTS account that will provide the exact level of authentication desired of your customers and/or vendors.

If you've registered for a SPoTS account, you can use and take full advantage of the Self-Service Portal. To do so, simply configure a portal user. For detailed instructions, see the section entitled *How to Create a Self-Service Portal User*.

L. What is Concurrent Licensing?

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users but especially for account administrators. It describes the concept of *Concurrent Licensing*. There are no essential prerequisites for this section.

One important consideration in choosing a trouble ticketing / problem tracking system for your business is the cost of purchasing the hardware, software, and support for the system. The ASP / Concurrent Licensing model employed by LegendSoft in providing SPoTS is one of the most cost-effective models you'll find in the marketplace today.

All costs of using SPoTS are incorporated into the licenses you purchase. There are no hidden support costs, no hidden upgrade costs, no hidden hardware costs, and no hidden maintenance costs.

In the SPoTS concurrent licensing model, you must have one valid license for each user actively using the system. You may setup as many users as you wish and they may all access the SPoTS application. However, the number of those users actually able to use the system at once will be limited by the number of licenses valid for your account.

For example, your company may employ 100 individuals. You may create a unique username for each employee and they may all login and use the system; although, if you purchase 10 licenses only 10 of your employees will be able to access the system at the same time. This model is very efficient as it is unlikely that all of your users will need to access the system at once. In most cases, you'll find that it is entirely feasible to maintain a ratio of 5 users to every license purchased without encountering license limitations.

You may purchase licenses for your account with a credit card on-line by logging into your account, selecting the *System Info* tab and clicking the *View / Purchase Licenses* link.

M. What is a Statistical Report?

1. Intended Audience, Prerequisites, and Overview

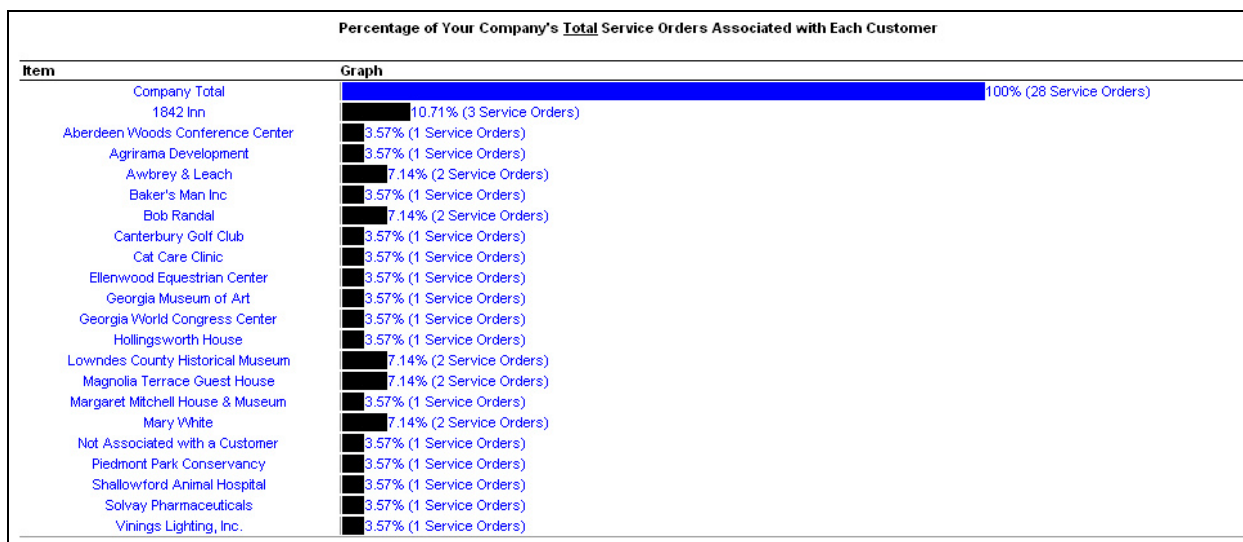
This section is intended for all users. It describes the concept of *Statistical Reporting*. There are no essential prerequisites for this section.

An important feature of using your SPoTS account is the ability for you to create statistical reports. Statistical reports can help you spot trends in your account data that help you in managing the operation of your business. For example, say that you own 15 fast food restaurants and you use your account to track customer complaints. Using statistical analysis of the trouble tickets in your account, you will be able to easily identify those locations that are operated well and those that aren't.

The statistical reporting feature of your account can indeed be one of the most useful features of SPoTS. Using this functionality can provide you a view of your business that is not normally attainable.

Rather than displaying service orders or customer information, statistical reports display bar graphs depicting comparisons of various aspects of your account data. Some examples of statistical reports are shown below. You will see from these examples their potential application to your business.

- This report depicts the number of service orders created for each customer within your account. From this information you can identify those customers that have historically experienced the most problems. Using this analysis you might reallocate sales personnel to help retain those customers.



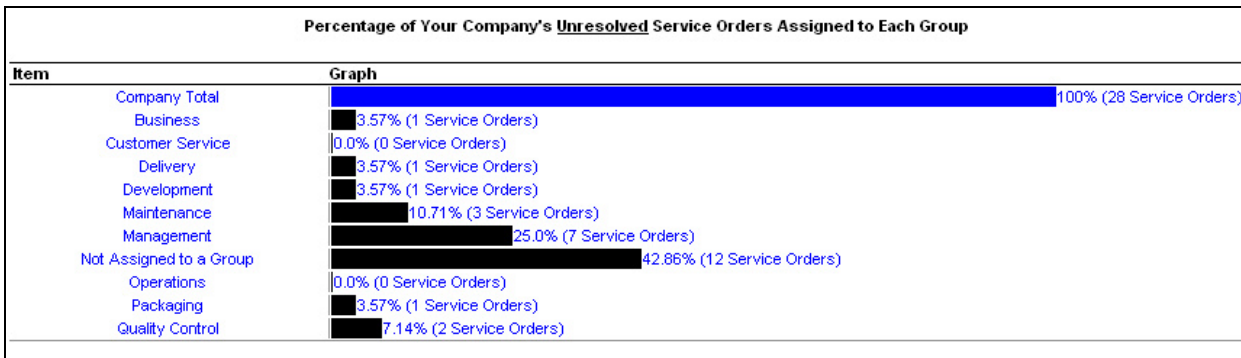
- Each bar in this graph displays the percentage of unresolved service orders associated with each of your customers. While the previous graph displays problems experienced on a customer-by-customer basis over a period of time, this graph displays the customers who are currently experiencing the most problems. (The red portion of each bar indicates the percentage of unresolved trouble tickets for that customer.) You might use this information to reallocate customer service or support personnel to those customers that need it the most.

Comparison of Resolved Service Orders to Unresolved Service Orders per Customer			
Item	Resolved Service Orders	Unresolved Service Orders	Graph
1842 Inn	2 (66.67%)	1 (33.33%)	
Aberdeen Woods Conference Center	0 (0.0%)	1 (100.0%)	
Agrirama Development	1 (100.0%)	0 (0.0%)	
Awbrey & Leach	2 (100.0%)	0 (0.0%)	
Baker's Man Inc	1 (100.0%)	0 (0.0%)	
Bob Randal	2 (100.0%)	0 (0.0%)	
Canterbury Golf Club	1 (100.0%)	0 (0.0%)	
Cat Care Clinic	1 (100.0%)	0 (0.0%)	
Ellenwood Equestrian Center	0 (0.0%)	1 (100.0%)	
Georgia Museum of Art	1 (100.0%)	0 (0.0%)	
Georgia World Congress Center	1 (100.0%)	0 (0.0%)	
Hollingsworth House	1 (100.0%)	0 (0.0%)	
Lowndes County Historical Museum	2 (100.0%)	0 (0.0%)	
Magnolia Terrace Guest House	2 (100.0%)	0 (0.0%)	
Margaret Mitchell House & Museum	0 (0.0%)	1 (100.0%)	
Mary White	2 (100.0%)	0 (0.0%)	
Not Associated with a Customer	1 (100.0%)	0 (0.0%)	
Piedmont Park Conservancy	1 (100.0%)	0 (0.0%)	
Shallowford Animal Hospital	0 (0.0%)	1 (100.0%)	
Solvay Pharmaceuticals	1 (100.0%)	0 (0.0%)	
Vinings Lighting, Inc.	1 (100.0%)	0 (0.0%)	
Company Totals	23 (82.14%)	5 (17.86%)	

- The following report could help you identify employees that excel in resolving problems quickly. It displays the average amount of time to resolve a trouble ticket for each system user. This information could be used, in part, to award bonuses for good performance.

User's Average Time To Resolve a Service Order (expressed as a percentage of your account average)	
Item	Graph
Company Average	1108.33 hours (100%)
ancking	996.49 hours (89%)
beckyhayes	1290.14 hours (116%)
bradyates	1443.69 hours (130%)
chrislogan	1556.17 hours (140%)
danmartin	706.2 hours (63%)
demouser	1046.57 hours (94%)
ellenwhite	561.65 hours (50%)
janedoe	1253.01 hours (113%)
jenhare	1500.3 hours (135%)
joebrady	1056.49 hours (95%)
lynnbice	513.12 hours (46%)
marywynn	23.69 hours (2%)
mikewills	1087.27 hours (98%)
samriley	1277.85 hours (115%)
saralane	1683.17 hours (151%)
tripdavis	844.55 hours (76%)
waltgriffin	1315.02 hours (118%)

- The following graph depicts the number of unresolved problems currently assigned to each group within your company. This information could be applied to determine which department requires greater attention from management.



N. What is an Escalation and what are Escalation Criteria?

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users. It describes the concepts of *trouble ticket* or *service order escalation* and *escalation criteria*. Prior to reading this section you should first read the sub-section entitled *What is a Service Order*.

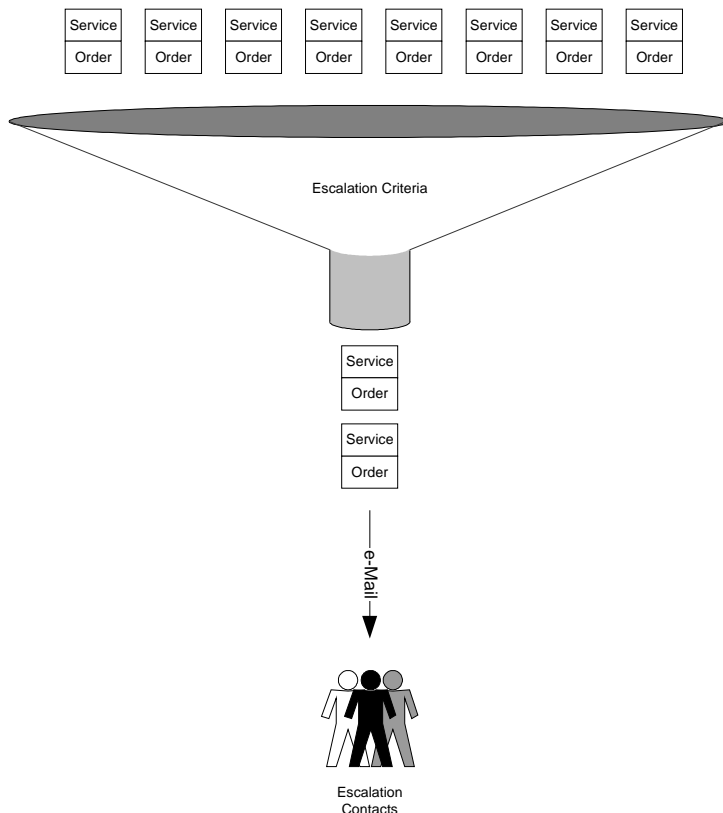
SPoTS handles the escalation of a service order through e-mail. That is, if a service order remains unresolved for a specified time period and the service order matches certain other criteria, SPoTS will automatically e-mail the service order to those users designated as *escalation contacts*.

Service orders can be escalated in one of two ways to one of two designated groups of escalation contacts:

1. Project or company administrators can specify escalation criteria for a specific project. These are referred to as *project escalation criteria*. They should then also designate a corresponding subset of users as *project escalation contacts*.

Project escalation criteria are applied only against service orders within the project corresponding to the criteria. (In other words, different escalation criteria can be configured for each project within your account.) The system applies these criteria to identify unresolved service orders. For each unresolved service order matching the criteria, an e-mail containing the service order contents is sent to all users designated as escalation contacts for the respective project.

2. Company / account administrators can specify escalation criteria for specific groups. These are referred to as *group escalation criteria*. They should then also designate a corresponding subset of users as *group escalation contacts*.



Group escalation criteria are applied only against service orders assigned to the group corresponding to the criteria. (In other words, different escalation criteria can be configured for each group within your account.) The system applies these criteria to identify unresolved service orders. For each unresolved service order matching the criteria, an e-mail containing the service order contents is sent to all users designated as escalation contacts for the respective group.

Regardless of whether you are configuring project escalation criteria or group escalation criteria, you must always specify the time period that must elapse before a service order is escalated. For example, a project manager may wish to receive an e-mail for any high priority service order that has been unresolved for 24 hours.

O. What are Billable Types and Billable Items?

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users. It describes the concepts of Billable Types and Billable Items and how they are associated with a trouble ticket, Service Order, project and customer. Prior to reading this section you should first read the sub-section entitled *What is a Service Order*.

SPoTS enables you to track the cost associated with a trouble ticket or the sale of items associated with a Service Order. The system employs the use of *Billable Types* to define the types or category of items you are tracking. For example, consultants normally bill their time on an hourly basis. Therefore, you may wish to create a Billable Type by the name of "Hours". On the other hand, a repair shop may charge for replacement parts. In this case, it makes sense to create a "Parts" Billable Type. Of course, you may want to create both "Parts", "Hours", or any number of other items corresponding to those items for which it is appropriate to track costs or sales.

Each cost or sale associated with a trouble ticket or Service Order is referred to as a *Billable Item*. You may associate any number of Billable Items with a Service Order. Billable Items associated with a Service Order are accessible through the Service Order Billing tab. You may obtain financial reports for Billable Items in your browser or in Microsoft Excel format. These reports can, among other things, be created for a project or for a particular customer. This is extremely helpful when invoicing and managing projects employing many different consultants and/or vendors.

Each Billable Type created may have a rate associated with it. The system multiplies this rate by the quantity of Billable Items entered to calculate the total cost of each Billable Item entry. For example, a particular consultant may charge \$100 per hour. The consultant may then enter their hours, say 4.25, into the system for a particular Service Order. The system will automatically calculate the total cost of the entry as \$425. The same principle applies to "parts" or other types of Billable Items applicable to your business.

At your option, a rate can be configured as fixed or variable. A variable rate allows the user to enter a cost manually, regardless of the actual calculated cost (rate x quantity). In the previous example, a consultant worked 4.24 hours at a rate of \$100 per hour. However, it is sometimes appropriate to discount rates. Therefore, the consultant can still enter the total number of hours worked (4.25) but the cost associated with this time could, for example, be billed at a cost of \$250 instead of the calculated \$425. Whether or not a Billable Type's rate is fixed or variable is configured when the Billable Type is created.

P. What are Custom Reports and What is the Custom Report Builder?

1. Intended Audience, Prerequisites, and Overview

This section is intended for all users. It describes the concept of creating and saving the criteria used to produce a Custom Report. Prior to reading this section you should first read the sub-sections entitled *What is a Service Order* and *What is a Customer*.

In addition to creating simple, single-use filtered reports, SPoTS enables you to create and save Custom Reports. These custom reports are generated through the creation of customized database queries. Together, these queries and custom reports can be named and saved within your account and used repeatedly to generate reports containing only the data necessary for your business needs.

The term Custom Report Builder is used to describe three separate but similar screens that are used to formulate the criteria used in your queries and to specify the format for your Custom Reports. There is a separate Custom Report Builder page for the creation of:

1. Reports containing customer data
2. Reports containing Service Order data within a single project
3. Reports containing Service Order data across multiple projects

Custom reports can be private or public. Public reports may or may not be publicly editable. A *public* report is one that can be executed or run by any user within your account. If a custom report is not designated as public, then it is automatically treated as a *private* report. A private report is only visible, and therefore executable, by the individual who created it. A public report may also be designated as *publicly editable*. This allows any user within your account to modify the criteria used to generate the report or to modify its format.

IV. Application Architecture

A. Overview, Intended Audience, and Prerequisites

This section provides SPoTS account administrators and end-users an overview of the data components used within the application. By understanding how the data components relate to one another:

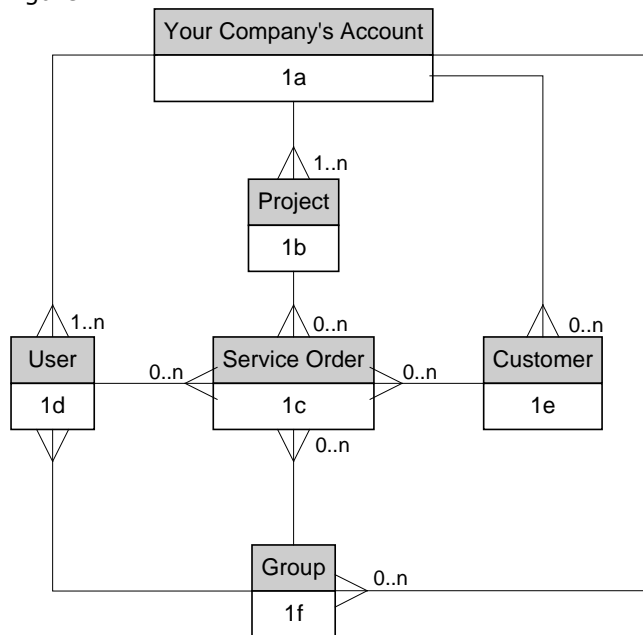
- 1) A business can customize SPoTS to its own specific purpose, and
- 2) End-users will be able to utilize the system in a proficient and effective manner.

If you're unfamiliar with the concept of a trouble-ticketing system, you may want to review the sections entitled *What is a Service Order* and *What is a Project* prior to reading this section. An understanding of entity-relationship diagrams is also helpful, but not required, in understanding the information in this section.

B. Account-Level Data Components

1. Account-Level Data Component Summary

Figure IV-1



- Your account (1a) can contain one or more projects (1b).
- Your account (1a) can contain zero or more customers (1e).
- Your account (1a) can contain one or more users (1d).
- Your account (1a) can contain zero or more groups (1f).
- A project (1b) can contain zero or more service orders (1c).
- A user (1d) can have zero or more service orders (1c) assigned to him or her.
- A group (1f) can have zero or more service orders (1c) assigned to it.
- A customer (1e) can have zero or more service orders (1c) associated with it.
- A group (1f) can contain zero or more users (1d).

Please refer to the entity-relationship diagram (Figure IV-1) as a visual reference of the different entities used in SPoTS when creating and configuring your new account.

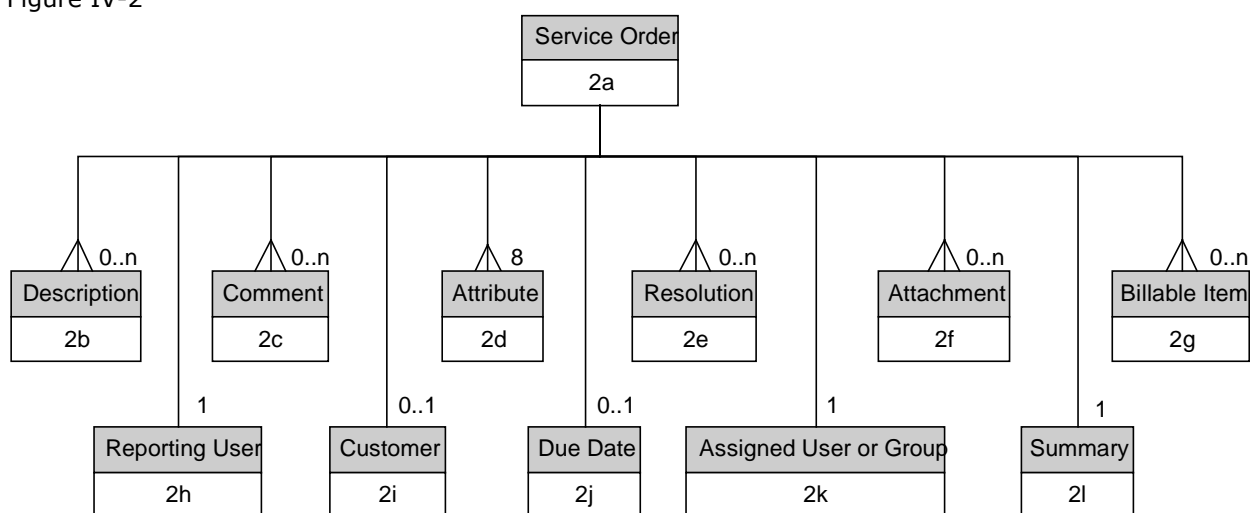
In order to use SPoTS, you must first create an account (1a). For example, if you are managing apartment rentals for Post Properties, you might name your account Post Properties. During the account setup process, you must create at least one project (1b). A project is a way to group similar problems/requests/trouble-tickets/issues, also known as Service Orders (1c). For instance, a property manager may have two projects: *Ceiling Fan Installations* and *Plumbing Problems*. Each project typically contains many service orders. Therefore, the *Ceiling Fan Installations* project may have a service order open for each apartment, and each order could be updated with information pertinent to that apartment's fan installation.

Your account has relationships with various other entities that you configure in SPoTS. Not only can an account (1a) have many projects (1b), but it can also have many users (1d), groups (1f), and customers (1e). A user is an individual that can log in and create service orders and/or have service orders assigned to him/her. Users can also be associated with one or more groups, which are subsets of users to whom tickets can be assigned. For example, in the property management scenario, Amy, Joe, and Mike could be users assigned to the Service Personnel group, while Tom and Patty could be users assigned to the Management group. Therefore, when tickets have to be opened for service or management, the tickets could be assigned to a designated group, rather than a particular person. This is especially helpful when people opening tickets would not know to which individual a ticket should be assigned. Note that a service order must be assigned to either a group or user.

Each account can have multiple customers representing either internal or external clientele. Service orders can, but do not have to be, associated with a customer. Reports can be created that show statistics on service orders associated with each customer.

C. Service Order Data Components

Figure IV-2



1. Service Order Data Component Summary

(A ticket is referred to as a Service Order in SPoTS.)

- A service order (2a) has 8 different attributes (2d). (Attributes are configured by an administrator.)
- A service order (2a) has zero or more description entries (2b).
- A service order (2a) has zero or more comment entries (2c).
- A service order (2a) has zero or more resolution entries (2e).
- A service order (2a) has zero or more file attachments (2f).
- A service order (2a) has zero or more billable items (2g).
- A service order (2a) has one user (2h) who reported the service order.
- A service order (2a) can be associated with zero or one customer (2i).
- A service order (2a) can have a due date (2j), or not.
- A service order (2a) can have exactly one assigned user or assigned group (2k).
- A service order (2a) has exactly one summary (2l).

Figure IV-3

Please refer to Figure IV-3 (above) as a visual reference of the different components that comprise a service order in SPoTS. The fields in red boxes must be populated on each service order. Fields outlined in green are optional, while those designated with a yellow or blue arrow can be classified as required or optional.

The Summary page of a service order includes seven administrator-defined attribute fields (those highlighted with a yellow arrow), plus fields for an assigned group or individual, a due date, a customer, and a reporting person. Each of the administrator-defined attribute fields can be designated as required or optional. (The default is optional.) For example, in the property management example used above, the attributes are configured to be:

1. *priority*
2. *tenant history*
3. *unit type*
4. *current balance*
5. *order type*
6. *current status*
7. *internal priority*

In the *Ceiling Fan Installations* project, *priority*, *order type*, and *current status* might be designated as required attributes, while *tenant history*, *unit type*, and *current balance* may be designated as optional fields. On the other hand, project *Plumbing Problems* may have only the *current status* attribute designated as required.

Each service order must be assigned to a group or individual user and must have a 'reported by' person associated with it. The company administrator defines all of the names available for selection in these fields. (Note that the reporting person can be different from the person authoring the service order.)

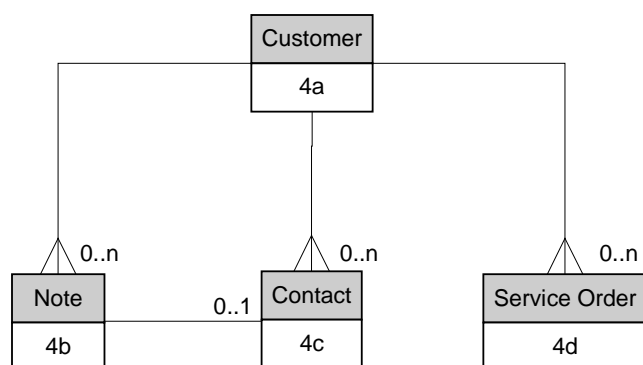
The *due date* field is not required. The values available for entry into the customer field are the customer names that have been entered into the customer relationship management (CRM) section of your account. Note that the company administrator can associate a customer with a particular user, so anytime that user creates a new service order the designated customer is automatically pre-populated in the customer field. For instance, if Mike in Service Personnel typically works with Omni Property Management, each time Mike opens a ticket, Omni Property Management is pre-populated into the customer field. Note: values which auto populate in the customer field can be manually overridden, on a service-order-by-service-order basis, or by removing the user/customer association.

Tabs on pages behind the service order Summary page contain the service order's *descriptions, comments, resolutions, and attachments*. A single service order may contain one or more of these entries; however, none are required. Description and comment entries allow users to enter additional detail supporting the service order, while resolution entries capture solutions that address the service order allowing it to be resolved.

D. Customer Data Components

1. Customer Data Component Summary

Figure IV-4



- A customer (4a) can have zero or more notes (4b).
- A customer (4a) can have zero or more contacts (4c).
- A customer (4a) can have zero or more service orders (4d).
- A customer note (4b) can have zero or one customer contact (4c) associated with it.

Please refer to the entity-relationship diagram (Figure IV-4) as a visual reference of the different entities used in SPoTS when creating customers within your account.

SPoTS incorporates fundamental customer relationship management (CRM) functionality. You need not use this functionality if your company is using SPoTS internally. However, if your company provides customer service for the products you sell, this CRM functionality can be very beneficial.

The information contained within each customer (4a) includes data items such as name, billing address, shipping address, phone, fax, web site, and description. You may also store as many contacts (4c) for each customer as needed. Each of these contacts has its own data items such as name, title, e-mail address, phone numbers, addresses, and description. You can note (4b) a customer's account as many times as you like. For example, you might make it your policy to add a new note anytime a customer telephones you for service or to ask a question. By doing this, your customer service representatives have a centralized location for accessing information about your customers. Customer notes are free-form text entered by the user. They are typically used not when a customer is experiencing a problem (a Service Order is used for this purpose), but when one of your employees wishes to share helpful information about the customer with other employees. If desired, a note can be associated with a particular customer contact.

Of course, a Service Order can be associated with a customer so that if a customer is experiencing a problem with your product or service, their issue can be uniquely tracked. Through SPoTS statistical reporting, you can then determine which of your customers require the most support and which customers experience the most or the fewest number of problems.

E. Application Architecture Summary

Now that you understand the application data components and their relationships to one another, you'll be a more proficient system user, and better able to adapt SPoTS for use at your company. One of the best ways to learn the system is to sign up for a trial account and begin using it. Most screens within the application have help text, referred to as "Usage Tips", at or near the bottom of the page. There's no need to be timid when experimenting with a trial account. Go ahead and create users, groups, customers, and service orders. Then, delete or modify them as you become familiar with the application.

After some experimentation you'll begin to visualize how your account should be configured. Depending upon your company's business model, you'll probably want to setup your account in one of the following ways:

1. **Create a separate project corresponding to each of your products.** This setup is typical when:
 - a. you have several products
 - b. you have many, many different customersFor example, Adobe Systems Inc. would likely create a separate project to track issues their customers encountered with each of their different products.
2. **Create a separate project corresponding to each of your services.** This setup is typical when:
 - a. you have several services
 - b. you have many, many different customersFor example, Service Master would likely create a separate project to track issues for each of their different services (e.g. Lawn Analysis, Plumbing, Carpet Cleaning, etc.).
3. **Create a separate project corresponding to each of your departments.** This setup is typical when:
 - a. SPoTS is used internallyFor example, Verizon Wireless would likely create a separate project for Operations, Revenue Assurance, Information Technology, Desktop Support, etc.
4. **Create a separate project corresponding to each of your customers.** This setup is typical when:
 - a. you have a few large customers
 - b. you have a relatively small number of products or servicesFor example, the North Highland Company (a consulting firm) would likely create a separate project for each of their clients.

V. How to Register for an Account

A. Overview, Intended Audience, and Prerequisites


This section describes how to register for a new account. It is intended for first-time users who will be responsible for administering their account. We strongly encourage you to review section III, Application Architecture, prior to reading this section. Understanding the architecture of the system is fundamental to a successful account setup.

B. The Registration Process

Figure V-1

Register For A New Account

The registration information gathered below will be held in strict confidentiality. (Please click [here](#) to read our privacy policy.)
 Registering a new account allows you to utilize and evaluate the system for a period of 90 days.
 There is no cost or obligation for using the 10 free licenses provided during the aforementioned period.
 If you no longer wish to continue using your account, no action is required on your part, and it will eventually be deleted.




After successfully submitting the registration information below, you will receive:

- ◆ An administrator user ID and password for your new account.
- ◆ Ten (10) free concurrent licenses, valid for **90 days**.

Ten licenses are sufficient for a work group of 10 to 25 users, depending upon your work environment.

(Please see our [concurrent licensing](#) page for more detailed information.)

With the administrator ID and free licenses, your organization will have full access to your account. Once logged in, you may purchase additional licenses if ten licenses are insufficient for your needs.



This web site is secured using a Thawte Digital Certificate. This ensures that all information you send to us via the World Wide Web will be encrypted. Please click on the Thawte Authentic Site Seal which demonstrates our commitment to your security.

Enter your contact information

(Fields in blue are required.)

Company / Account Name:
 (Your Company / Account Name will be used when logging in to the system.)

First Name:
 Middle Initial:
 Last Name:

Phone Number:
 Attention:

Address Line 1:
 Address Line 2:
 City:
 State / Province:

(Please select "other" if your address is outside the US or Canada.)

Zip Code:
 Country:

e-Mail Address: @

Registering is the first step in setting up a new account. By registering you are actually causing the necessary data elements to be created within the SPoTS DB2 database.

Please note that the information you enter when registering for an account is used to keep you updated with the latest system information. Should a problem occur with your account or if the system will be unavailable for maintenance reasons, we may use the information you enter to contact you. Your information will not be sold to anyone and it will be held in strict confidentiality.

Also note that all communications from your browser to SPoTS occurs via Secure Sockets Layer, or SSL. This ensures that all of your account information remains secure.

Please refer to Figure V-1 (above) when following these steps to register for your account:

1. Enter your company / account name. This is the account name you and your users will enter when accessing your account. All of your users will use the same account name.
2. Enter your contact information including first name, last name, phone number, mailing address and e-mail address.
3. Click the *Next* button. You will then be presented with a verification screen (Figure V-2).

Figure V-2

Please Verify Your Registration Information

Number and term of license(s)

Number of Licenses: **10 Licenses**
Date of license expiration: **2006-07-03 15:30:15.487**

Your contact information

Company Name: **ACME Corporation**
First Name: **James**
Middle Initial:
Last Name: **Fischer**
Phone Number: **4045551212**
Attention:
Address Line 1: **12850 Highway 9**
Address Line 2:
City: **Atlanta**
State / Province: **GA**
Zip Code: **32205**
Country: **US**

e-Mail Address: **custservice@legendsoft.net**

Terms and Conditions

This End-User License Agreement (hereinafter "Agreement") is by and between LegendSoft, Inc., a Georgia corporation, and the company (or other entity) acknowledging this Agreement (hereinafter "Customer"). By checking the box indicating that "I accept the terms and conditions", Customer and LegendSoft Inc., agree to be bound by the following terms And conditions. If Customer does not agree with these terms, Customer must not check the box and may not use this service.

1. General.

The Service, consisting of access to the SPoTS Application, is provided by LegendSoft, Inc. through the web site located at www.e-spot.biz. LegendSoft, Inc. agrees to provide the Service outlined in the LegendSoft, Inc. Service Level Agreement (hereinafter "SLA") and Customer agrees to strictly abide by all terms of this Agreement. The SLA is governed by and subject to the terms and conditions of this Agreement.

This Agreement shall be governed by and construed under the laws of the State of Georgia, without regard to the choice or conflicts of law provisions of any jurisdiction, and any action brought by Customer or LegendSoft, Inc. to enforce or interpret any provision of this Agreement shall be brought exclusively in an appropriate state or federal court in Atlanta, Georgia.

This Agreement comprises the entire agreement and understanding of the subject matter contained herein between Customer and LegendSoft, Inc. and supersedes all prior negotiations, discussions, or agreements, whether written or oral between LegendSoft, Inc. and Customer.

2. Restricted License.

Subject to the terms and conditions of this Agreement, LegendSoft, Inc. hereby grants Customer, and Customer accepts, a non-exclusive, non-transferrable license to access and use the Service. Unauthorized use, resale or commercial exploitation of the Service and/or the Content in any way is expressly prohibited. All rights not expressly granted to Customer are hereby reserved by LegendSoft, Inc. Customer agrees:

(s) to abide by this Agreement.

4. Verify the accuracy of the information you've entered.
5. Record your Account / Company Name for future reference.
6. Near the bottom of the page, check the box that indicates your acceptance of the Terms and Conditions (Figure V-3).
7. If you wish to have your Account Name, administrative user ID, and password e-mailed to you, check the box that says, "Check this box to have this information e-mailed to you as well" (Figure V-3). Regardless of whether or not you check this box, the next page will display the aforementioned information to you.

Figure V-3

Customer acknowledges that the Service is not intended for permanent storage and agrees not to use the Service for archiving or back-up purposes. Customer acknowledges that the Service is not intended for sending mass e-mails or "SPAM" and agrees not to use the Service for mass e-mailing or for "SPAMMING". Customer will not store "mission critical" data on the Service, including without limitation data pertaining to power generation, national security, or any function to sustain or rescue the health or well-being of any person.

11. Indemnification

Customer agrees to indemnify and hold harmless LegendSoft, inc., and its respective officers, directors, employees, consultants, agents, licensees and licensors from any claim, demand, or damages, including reasonable attorneys' fees, arising out of or in connection with use of the Service. Customer's obligation to indemnify will survive the expiration or termination of this Agreement by either party for any reason.

[I have read and accept the Terms and Conditions](#)

Your registration confirmation number, administrative user ID, and password will be displayed to you after verifying the information above.

Check this box to have this information e-mailed to you as well.

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- Click the *Verify* button and a confirmation page will be displayed containing the information necessary to login to your new account (Figure V-4).

Figure V-4

Registration Confirmation

Thank you for registering.

Please note the confirmation number, user ID, and password shown below for your records.

Number and expiration date of license(s)

Number of Licenses: **10 License(s)**
 License expiration date: **2006-07-03 15:30:15.487**

Confirmation Number

000000104824

Your administrator user ID and password

User ID: **admin-57**
 Password: **4a06d**

[Login](#) [Home](#)

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- For future reference, record your *User ID* and *Password*.

You've now successfully registered and created a new account. You may login to your account by clicking the *Login* link and entering your Company / Account Name, User ID, and Password.

VI. How to Configure an Account Using the Express Configuration Wizard

A. Overview, Intended Audience, and Prerequisites

This section describes how to configure a new account in the quickest possible fashion. It is intended for first-time users meeting one or more of the following criteria:

1. You need to setup your account as quickly as possible
2. You've created a trial account for the purpose of evaluating basic system functionality
3. Your business falls into one of a number of pre-configured categories upon which you want to base your configuration. (These categories are displayed in the *Express Configuration* listbox.)

We strongly encourage you to review section III, Application Architecture, prior to reading this section. Understanding the architecture of the system is fundamental to a successful account setup.

B. Configuration Overview

After logging into your account for the first time, you will automatically be placed into the *Configuration Wizard* (Figure VI-1). The configuration wizard will guide you through the steps required to setup your account for actual use. There are two distinct paths that you can choose to take through the wizard, the *Express Configuration* and the *Custom Configuration*. This section describes the express configuration. (The custom configuration is covered later in this document.)

Figure VI-1



Nearly everything that you configure while navigating through the wizard can be modified at some point in the future. For this reason it is not necessary that your business match exactly with the entries available to you in the Express Configuration listbox. Simply choose the option that you think most closely approximates the way that you will use SPoTS, then click the *Next* button. The system will automatically configure a new project for you. The name of this project will match the entry you selected from the listbox. You will then be asked to select a *Default Project*. To do so, click the *Select* link next to the appropriate project (at this point only one project will be available for selection) as shown in Figure VI-2.

Figure VI-2

Select A Default Project			
	Name	Project Code	Description
Select	Customer Service	Customer Service	Project created by the Express Setup Wizard.

A *Default Project* is the project under which all new service orders / tickets will be created, and from which all project-level reports will be generated. You must always have a default project selected. If you've configured more than one project under your account, you can always switch between them by selecting the *switch projects* link at the top of your main browser window. This link is circled in red in Figure VI-3. Once selected, your currently project is always shown near the top right-hand portion of each page. This is shown in the green box in Figure VI-3.

Figure VI-3



Once you've selected the default project you'll be taken to the *Cust / Orders* tab of the *main menu*. On this tab you will see several links which will allow you to view, create, or search for customers and service orders. Other tabs available to you are *Reports*, *System Info*, *Preferences*, and *Administration*. Note that some of the links and tabs available to you as an administrator are not available to standard users. An overview of application security is provided later in this document.

Now that you've completed the express configuration and selected a project, you can begin exploring the system and experiment with its functionality. You may also navigate back through the configuration wizard by clicking the *Administration* tab and selecting the *Configuration Wizard* link as shown in Figure VI-4.

Each time you successfully navigate through the express configuration wizard, a new project will be created under your account. This can be helpful in comparing the different express configuration types available and in understanding how the system can be customized in a short time frame.

Note that the express configuration wizard does not navigate through many important areas of functionality including, but not limited to, creating new users, configuring automatic notifications, security configuration, group creation, etc.

Figure VI-4

The screenshot shows the SPoTS web application interface. At the top, there is a navigation bar with the SPoTS logo and a 'Place Your Logo Here' placeholder. The navigation bar includes links for 'home', 'main menu', 'switch projects', 'logoff', 'cust search', 'company report', 'project report', 'new service order', 'new customer', and 'service order search'. Below the navigation bar, there is a secondary menu with 'Dashboard', 'Service Orders', 'Customers', 'Reports', 'System Info', 'Preferences', and 'Administration' (circled in red). The 'Administration' menu is expanded, showing two columns: 'Project Administration' and 'Company Administration'. Under 'Project Administration', there is a sub-section 'Property Management' with several options. Under 'Company Administration', there are several options, with 'Configuration Wizard' circled in red. The current project is identified as 'Property Management'. At the bottom, there is a copyright notice: '©2002-2007 LegendSoft, Inc. All rights reserved.'

VII. How to Configure an Account Using the Custom Configuration Wizard

A. Overview, Intended Audience, and Prerequisites

This section describes how to configure a new account using the *Custom Configuration Wizard*. It is intended for users meeting one or more of the following criteria:

1. You wish to configure the system for use by your business, but the express configuration wizard does not contain a pre-configured option that matches your business type.
2. You wish to create multiple account users and/or multiple projects.
3. You wish to perform a more detailed evaluation of the system, but are not yet ready to explore the system without some guidance.

We strongly encourage you to review section III, Application Architecture, prior to reading this section. Understanding the architecture of the system is fundamental to a successful account setup.

The custom configuration wizard will walk you through the following steps:

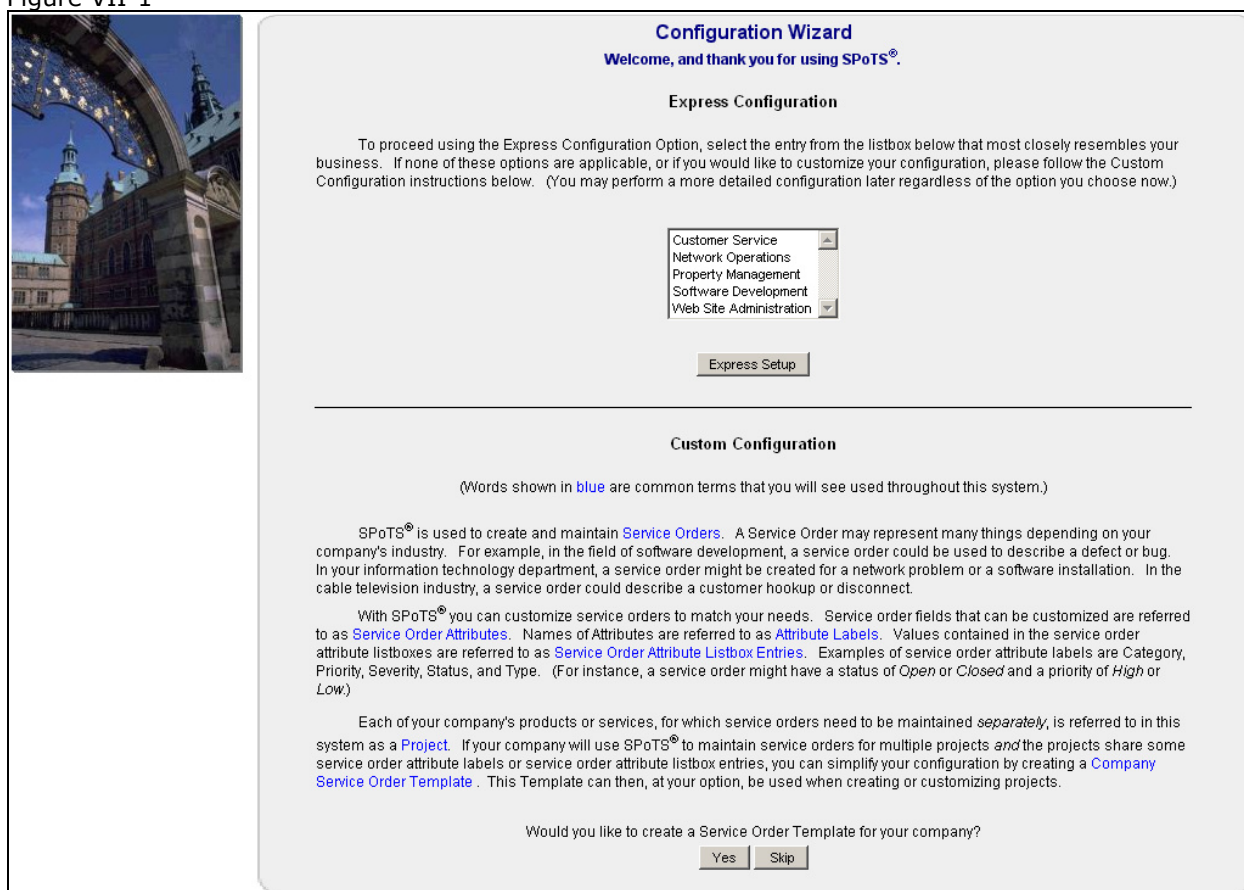
1. Create a *Service Order Template* for your company. If you anticipate the need for multiple projects in support of your business model, a service order template greatly reduces the number of steps required in configuring each of your projects. Essentially, the service order template can be configured once and applied over and over again to new projects. Depending upon the level of customization required you can expect this step to take from 15 to 45 minutes. This step is optional. (For more information regarding the company service order template, please refer to the sub-section entitled *What is a Service Order Template* in the *What Is* section of this document.)
2. Create one or more projects for your account. At least one project must be created before you can begin using your account. For each project you create, you will be prompted for a project name, a project description, and a project code. If you've already created a service order template for your account, you can apply this template to the new projects you create in this step. New projects can be created in a manner of minutes.
3. Create one or more new users for your account. When you register for an account a single administrative user is automatically created by the system. You must manually create user IDs for any other individuals that will be using your account. Creating each new user will take 1 to 3 minutes.
4. Purchase new licenses. When you register for a new account, the account is provided with 10 licenses that are valid for 90 days. If you know that you will have more than 10 concurrent system users, you can immediately purchase additional licenses. Purchasing additional licenses takes 5 to 10 minutes.

While you can easily step through the custom configuration wizard in less than 30 minutes, we suggest that you allocate at least this amount of time if you are a first-time user and prefer not to use the express configuration wizard.

B. Configuration Overview

After logging into your account for the first time, you will automatically be placed into the *Configuration Wizard* (Figure VII-1). If you've previously created a project, and you aren't automatically redirected to the configuration wizard after logging in, you can access it by selecting the *Configuration Wizard* link under the *Administration* tab (Figure VI-4).

Figure VII-1



Configuration Wizard
Welcome, and thank you for using SPoTS®.

Express Configuration

To proceed using the Express Configuration Option, select the entry from the listbox below that most closely resembles your business. If none of these options are applicable, or if you would like to customize your configuration, please follow the Custom Configuration instructions below. (You may perform a more detailed configuration later regardless of the option you choose now.)

Customer Service
Network Operations
Property Management
Software Development
Web Site Administration

Express Setup

Custom Configuration

(Words shown in blue are common terms that you will see used throughout this system.)

SPoTS® is used to create and maintain **Service Orders**. A Service Order may represent many things depending on your company's industry. For example, in the field of software development, a service order could be used to describe a defect or bug. In your information technology department, a service order might be created for a network problem or a software installation. In the cable television industry, a service order could describe a customer hookup or disconnect.

With SPoTS® you can customize service orders to match your needs. Service order fields that can be customized are referred to as **Service Order Attributes**. Names of Attributes are referred to as **Attribute Labels**. Values contained in the service order attribute listboxes are referred to as **Service Order Attribute Listbox Entries**. Examples of service order attribute labels are Category, Priority, Severity, Status, and Type. (For instance, a service order might have a status of *Open* or *Closed* and a priority of *High* or *Low*.)

Each of your company's products or services, for which service orders need to be maintained *separately*, is referred to in this system as a **Project**. If your company will use SPoTS® to maintain service orders for multiple projects *and* the projects share some service order attribute labels or service order attribute listbox entries, you can simplify your configuration by creating a **Company Service Order Template**. This Template can then, at your option, be used when creating or customizing projects.

Would you like to create a Service Order Template for your company?

Yes Skip

1. The first step in the custom configuration wizard is deciding if you will require multiple projects within your account. (Please also see the Section entitled *Application Architecture*, particularly the *Summary* sub-section, for more information regarding the need for multiple projects.) For example, you may work for a company that has several products and you wish to support each of these products through a separate project in SPoTS. To ease the work required in configuring each of these projects you can create a *Service Order Template*. This template contains the configuration elements that are common to all of your projects. Significant time and effort can be saved by then applying the template over and over again as a basis for each new project that you create.

If you wish to create a *Service Order Template*, click the *Yes* button, otherwise click the *Skip* button.

2. Next, you have the option of modifying the labels that appear on the summary page of a ticket / Service Order (Figure VII-2). The field labels are initially populated with system defaults. For example, if you want the label "color" to appear on the Service Order summary page, replace the default text for one of the field labels with the text "color". (Note that fields delimited with an asterisk are fields displayed in the Self-Service Portal.)

Once you've entered the appropriate field labels for the Service Order Template for your account, click the *Update* button. If no changes are required to any of the labels, you may click the *Skip* button.

Figure VII-2

Usage Tips

This page allows you to customize default Service Order Attribute labels for your Company's Service Order Template by entering the desired label into the appropriate field.

* - Field visible on the Self-Service Portal.

Report Service Order To

* Group: Individual:

Group Individual

* **Miscellaneous**

Date Resolved:

Color

Reported By:

Category

Module

Phase

Date Opened:

Severity

Status

Type

Reported Version:

Resolved Version:

Unresolved Resolved

* **Summary Description**

- The next page (Figure VII-3) will display your customized field labels. The contents of each drop-down listbox should be configured to contain values corresponding to the field labels you entered in the previous step. In the previous example, we stated that one of the field labels could be change to read "color". In this case, you should enter the corresponding drop-down listbox values for this field such as "red", "green", "blue", etc. This page allows you to enter these values. To do so, click on the field label text. The field labels are actually links to another configuration page where you can enter the drop-down listbox contents. So, to enter values for the "color" drop-down listbox, click on the "Color" label circled in red in Figure VII-3.

Figure VII-3

Usage Tips

This page contains your company's Service Order Template and demonstrates what a real Service Order might look like. Click on the blue Service Order Attribute Labels below to modify the associated Service Order Attribute Listbox Entries. (The "Reported Version" and "Resolved Version" listboxes must contain the same entries.)

* - Field visible on the Self-Service Portal.

Report Service Order To

* Group: Individual:

Group Individual

* **Miscellaneous**

Date Resolved:

Color

Reported by:

Category

Module

Phase

Date Opened:

Severity

Status

Type

Reported Version

Resolved Version

Unresolved Resolved

* Summary Description (limited to 255 characters)

[Proceed to Next Step In Configuration Wizard](#)

- Clicking on a field label link will take you to a page that displays all existing drop-down listbox entries. If no entries have yet been configured, none will be displayed (Figure VII-4).

To create a new drop-down listbox entry, click the *Create A New Color Attribute Listbox Entry For Your Company's Service Order Template* link as shown in Figure VII-4.

Figure VII-4



Administer Color Attribute Listbox Entries For Your Company Service Order Template

[Create A New Color Attribute Listbox Entry For Your Company's Service Order Template](#) [Back To Service Order Template](#)

Color	Default	Change Status To
Total:	0 entries	

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- Enter the appropriate text for the drop-down listbox entry as shown in Figure VII-5 and click the *Create* button. In most cases, you will want to select the *Default* radio button for the entry. Selecting the default button will ensure that the entry is added to the drop-down listbox for any new project where the Service Order Template was used as the template.

Figure VII-5



Enter A New Color Attribute Listbox Entry For Your Company Service Order Template

Attribute Listbox Entry:

Default Status: Default Non-Default

Creating a Color Attribute Listbox Entry for your Company Service Order Template has no effect on existing projects.

When an Attribute Listbox Entry has *Default* status, all new projects created with the checkbox in the *Create Project* page, will include the specified Attribute Listbox Entry.

If the Attribute Listbox Entry has *Non-Default* status, it will merely be included in the list of Attribute Entries, from which to choose, when customizing an existing project.

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- Each entry you create will be listed as shown in Figure VII-6. Once you're done adding all the necessary entries for the drop-down listbox, click the *Back to Service Order Template* link. This will guide you back to the Service Order Template page where you will see the entries you've created in the appropriate drop-down listbox. Proceed with the creation of the other drop-down listbox entries corresponding to each field label.

Figure VII-6

Administer Color Attribute Listbox Entries For Your Company Service Order Template

Create A New Color Attribute Listbox Entry For Your Company's Service Order Template [Back To Service Order Template](#)

Color		Default	Change Status To
Edit	Delete	blue	true Non-default
Edit	Delete	green	true Non-default
Edit	Delete	red	true Non-default
Edit	Delete	white	true Non-default
Edit	Delete	black	true Non-default
Edit	Delete	orange	true Non-default
Edit	Delete	yellow	true Non-default
Total:		7 entries	

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7. Your account must contain at least one project. The configuration wizard will guide you through the creation of one or more projects. Click on the *Next* button in the *Create a New Project* page (Figure VII-7).

Note: You may also navigate backward to the previous step in the wizard by clicking the *Previous* button. However, it is better to use the *Previous* buttons in the wizard than to use your browser's "back" button.

Figure VII-7



Configuration Wizard

Create A New Project

SPoTS[®] can be configured to track service orders for multiple, disparate products or services. Create a new [Project](#) for each product or service that requires separate service order tracking. *At least one project must be created before you will be able to use SPoTS[®].*

At your option, a project can be created using your Company Service Order Attribute Template. To do so, be certain to check the *Use Company Service Order Template* checkbox in the next page.

Whether or not you choose to use your company's Service Order Attribute Template, a new project can be customized for its specific needs. Modifying the attribute labels or the attribute listbox entries of one project will not affect your company Service Order Attribute Template, nor will it affect the attribute labels or attribute listbox entries of other projects.

The next two pages in the wizard will allow you to create one or more projects. Click the *Next* button when you are ready to create a new project. **Note: At least one project must be created for your account before proceeding to the next step in the configuration wizard.**

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8. Enter the name, description, and code for your project and click the *Create* button. (The project code is unused by the application at this time, but the field is required.)

If you've created a Service Order Template and you wish to use it as the basis for your project's configuration, check the *Use Company Service Order Template* checkbox.

Choosing the *Inactive* status radio button will prevent users from switching to, and working with the project. In most cases, you'll want to select the *Active* radio button.

Figure VII-8

Enter New Project Information

(The new project may take several minutes to propagate throughout the system.)

Enter New Project Information

Project Name:

Description:

Project Code:

Active Status: Active Inactive

Use Company Service Order Template

[View Company Ticket / Service Order Attributes](#)

Usage Tips

- ◆ A Project Code is required; although, a fictitious code may be used as it can be changed later.
- ◆ If the *Use Company Service Order Template* checkbox is *not* selected, you will be required to configure new Service Order Attribute Listbox Entries for the Project before creating Service Orders.
- ◆ If the checkbox *is* selected, the project will automatically include all Service Order Attribute Labels and all *Default* Service Order Attribute Listbox Entries from your company's Service Order Template. In either case, the Project attributes may be customized after the Project is created.

9. Your newly created project will then appear in the list of all projects contained within your account (Figure VII-9). To create another new project, select the *Create a New Project for Your Company* link.

If you've created at least one project, you may proceed to the next step in the wizard by selecting the *proceed to next step in custom configuration wizard* link at the top of the page.

Figure VII-9

ACME, Inc.

[home](#) | [proceed to next step in custom configuration wizard](#) | [main menu](#) | [logoff](#)
[cust search](#) | [company report](#) | [project report](#) | [new service order](#) | [s/o search](#)

Current Project
test2

Administer Projects For Your Entire Company

Changes may take up to 120 seconds to propagate through the system.

Create Another New Project for Your Company

		Name	Project Code	Active	Description
Edit	Delete	Network Operations	Network Operations	true	Project created by the Express Setup Wizard.
Edit	Delete	Customer Service	CS1	true	Customer Feedback
		Total:			2 Project(s)

Usage Tips

Deactivating a project prevents it from being selected by a user when navigating to the 'switch projects' page.

10. When you registered for your account a single administrative ID was automatically created. (This ID is probably the one you are using now.) If your account will be used by multiple people, you'll probably want to create separate user IDs for them. If so, click on the *Next* button in the *Create New Users* page of the configuration wizard (Figure VII-10).

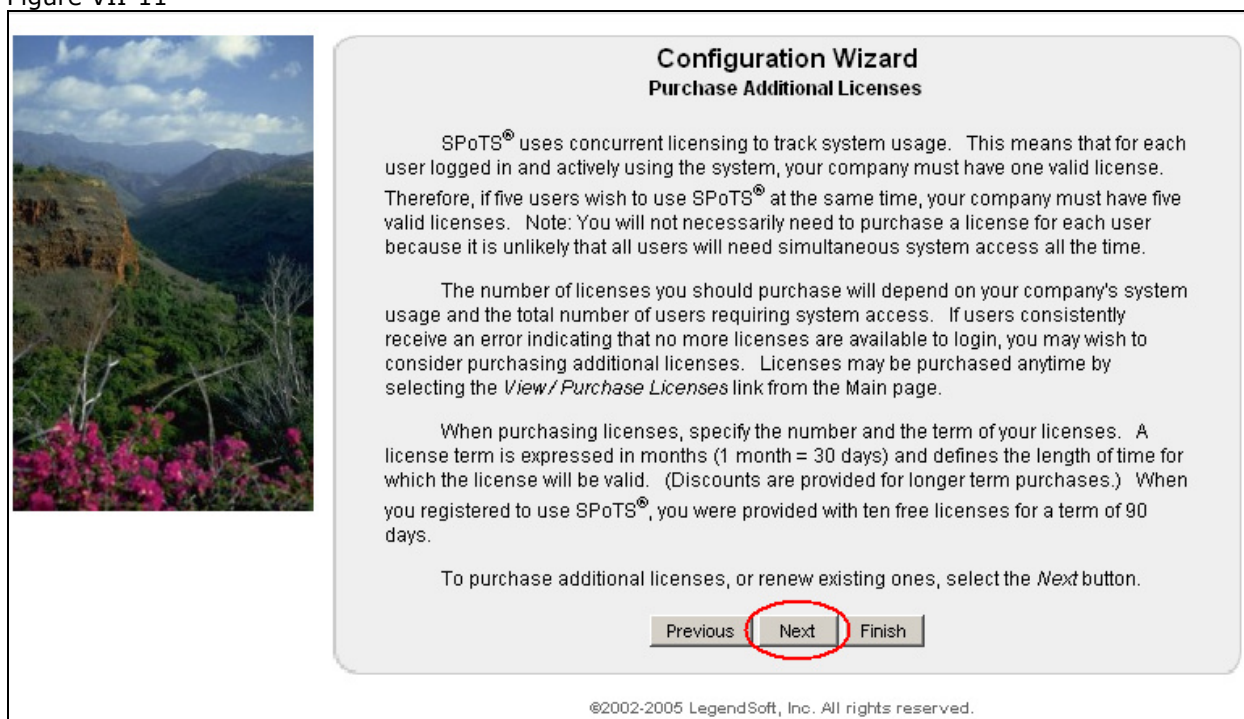
If you don't wish to create any more user IDs, you can either click the *Skip* button or the *Finish* button. Click the *Skip* button to navigate to the *Purchase Additional Licenses* page. Once you've created at least one project, you've met the minimum requirements to begin using your account. Therefore, you may also click the *Finish* button to exit the wizard.

Figure VII-10



11. After registering for a new account, you're provided with 10 free concurrent licenses each of which is valid for 90 days. If you anticipate that more than 10 users will be frequently accessing your account at the same time, you may purchase additional licenses. To do so, click the *Next* button on the *Purchase Additional Licenses* page of the configuration wizard (Figure VII-11).

Figure VII-11



12. The *Company Licenses* page displays information regarding the licenses for your account (Figure VII-12), including the date of purchase, date of expiration, the name of the individual who purchased the license, and which user is actively using a license.

Click the *Purchase New Licenses for <account name>* link to specify the number and length, or term, of the licenses you wish to purchase. Licenses may be purchased online with a credit card. As with all SPoTS transactions, any information transferred to our servers during the purchase is encrypted via Secure Sockets Layer (SSL).

Figure VII-12

Company Licenses (sorted by expiration date)						
Purchase new license(s) for ACME Corporation						
License Number	Expiration date	Date of Last Purchase / Renewal	Purchased By	Currently in Use By	License Expired	
1	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James	admin-57	no	
2	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no	
3	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no	
4	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no	
5	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no	
6	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no	
7	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no	
8	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no	
9	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no	
10	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no	
Total:	10 License(s)					

[Proceed to Next Step In Configuration Wizard](#)

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13. Enter all requested information into the *Purchase New Licenses* page (Figure VII-13) and click the *Next* button. Prior to completing the transaction, you will be presented with the final purchase price and the Terms and Conditions governing the usage of your account (Figure VII-14).

Figure VII-13

Purchase New License(s)

(Fields in blue are required.)

Enter the number of licenses to purchase

Licenses

Enter the term of the license purchase

Month(s)

Enter your name as it appears on your credit card

First Name:

Middle Initial:

Last Name:

Enter your credit card billing information

Phone Number:

Attention:

Address Line 1:

Address Line 2:





City:

State / Province:

(Please select "other" if your address is outside the US or Canada.)

Zip Code:

Country:



Credit Card Type:

Credit Card Number:

Credit Card Expiration Date: Month: Year:

Credit Card Security Code:

Your credit card security code is either 3 digits or 4 digits located in one of the following locations:

e-Mail Address: @

- Verify the amount of your purchase, the number of licenses you're purchasing, the term of the licenses, your payment information, and the Terms and Conditions.

Figure VII-14

Please Verify Your Purchase

Your Total Purchase Cost

\$1553.50

Number and term of license(s)

Number of Licenses: **10 License(s)**
Term of each license: **13 Month(s)**

Your name as it appears on your credit card

First Name: James
Middle Initial:
Last Name: Fischer

Your credit card billing information

Phone Number: 404-555-1212
Attention:
Address Line 1: 800 Jones Road
Address Line 2:
City: Atlanta
State / Province: **GA**
Zip Code: 30342
Country: **US**



Credit Card Type: American Express

Credit Card Number: xxxxxxxxxxxxxxxxxxxx

Credit Card Expiration Date: Month: 05 Year: 2006

Credit Card Security Code: 4873

Your credit card security code is either 3 digits or 4 digits located in one of the following locations:



e-Mail Address: james@fischer.net

Terms and Conditions

I have read and accept the Terms and Conditions

This End-User License Agreement (hereinafter "Agreement") is by and between LegendSoft, Inc., a Georgia corporation, and the company (or other entity) acknowledging this Agreement (hereinafter "Customer"). By checking the box indicating that "I accept the terms and conditions", Customer and LegendSoft Inc., agree to be bound by the following terms And conditions. If Customer does not agree with these terms, Customer must not check the box and

15. If the information is accurate and you agree to the Terms and Conditions, check the *I have read and accept the Terms and Conditions* checkbox and click the *Verify* button (Figure VII-15).

After clicking the *Verify* button, your transaction will be processed (Figure VII-16) and your licenses will immediately be added to your account and available for use.

Figure VII-15

"SPAMMING". Customer will not store "mission critical" data on the Service, including without limitation data pertaining to power generation, national security, or any function to sustain or rescue the health or well-being of any person.

11. Indemnification

Customer agrees to indemnify and hold harmless LegendSoft, inc., and its respective officers, directors, employees, consultants, agents, licensees and licensors from any claim, demand, or damages, including reasonable attorneys' fees, arising out of or in connection with use of the Service. Customer's obligation to indemnify will survive the expiration or termination of this Agreement by either party for any reason.

I have read and accept the Terms and Conditions

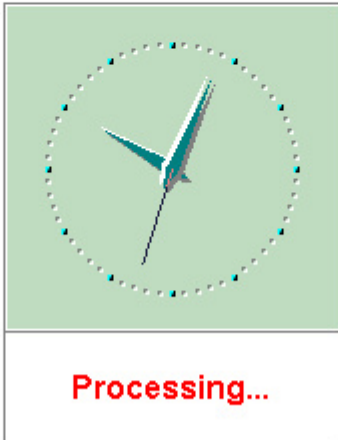
Verify Cancel

Your transaction will take a minute or two to be processed. While it is being processed, please do not click the back button in your browser or re-submit the transaction. If your credit card is accepted, your new licenses will be displayed to you in the *Company Licenses* page.

Figure VII-16

Please Wait While Your Payment Is Processed

Your payment should be processed within a few seconds.
However, the process could take up to 2 minutes.
Please do not use the Back or Stop buttons in your browser while the payment is being processed.



Processing...

16. Click the *proceed to next step in custom configuration wizard* link. The *Configuration Wizard Complete* page will be displayed. You may then click the *Finish* button to select a default project and begin using the system.

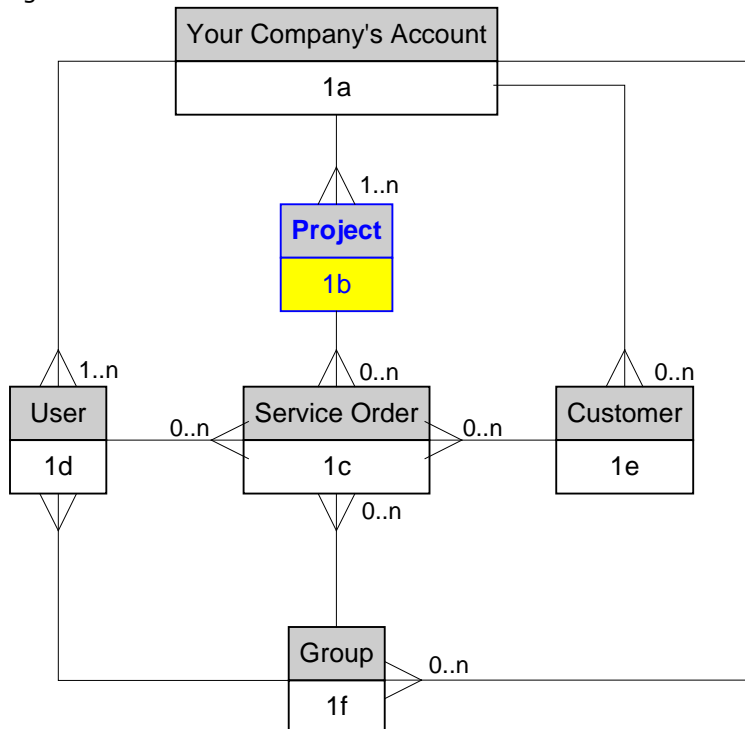
Note that the custom configuration wizard only navigates through a few of the basic configuration options available to you. At this point you should explore some of the other system functionality so that your company can take full advantage of SPoTS.

VIII. How to Create a New Project

A. Overview, Intended Audience, and Prerequisites

This section describes how to create a new project within your account. It is intended for account administrators. If you've just registered for a new account and you are now logging into the system for the first time, you should instead refer to the section entitled *How to Configure an Account Using the Express Configuration Wizard* or the section entitled *How to Configure an Account Using the Custom Configuration Wizard*. Refer to this section only after completing either of the two aforementioned sections.

Figure VIII-1



Your account can contain 1 or more projects (as shown in Figure VIII-1). A project is one of the ways in which tickets can be tracked. (Tickets can also be tracked by customer.) Each project can be independently configured with different ticket / service order field labels, attributes, and required fields. Individual projects can also have their own security settings.

Separate projects are typically used to track tickets for different lines of products or services. They are also used when different departments within your company use SPoTS. (See the *Application Architecture Summary* sub-section for more information regarding the use of separate projects.)

B. Configuration Overview

Figure VIII-2

The screenshot shows the SPOTS web application interface. At the top, there is a navigation bar with links for 'home', 'main menu', 'switch projects', and 'logoff'. Below this, there are tabs for 'Dashboard', 'Service Orders', 'Customers', 'Reports', 'System Info', 'Preferences', and 'Administration'. The 'Administration' tab is selected. The main content area is titled 'Main Menu - Administration' and is divided into two columns: 'Project Administration' and 'Company Administration'. The 'Company Administration' column contains a link for 'Work With Projects' which is circled in red. The footer of the page reads '©2002-2007 LegendSoft, Inc. All rights reserved.'

Please refer to Figure VIII-2 when following steps 1 through 3 below.

1. To create a new project, login as a company/account administrator.
2. Click the *main menu* link at the top of the page.
3. Click the *Administration* tab.
4. Click the *Work With Projects* link in the *Company Administration* box. A page will be displayed listing all of the projects currently contained within your account.
5. Click the *Create a New Project for Your Company* link as shown in Figure VIII-3.

Figure VIII-3

The screenshot shows the 'Administer Projects For Your Entire Company' page in the SPOTS web application. The page title is 'Administer Projects For Your Entire Company' and it includes a warning: 'Changes may take up to 120 seconds to propagate through the system.' A link for 'Create a New Project for Your Company' is circled in red. Below this is a table listing projects:

	Name	Project Code	Active	Description
Edit Delete	Network Operations	Network Operations	true Deactivate	Project created by the Express Setup Wizard.
Edit Delete	Customer Service	CS1	true Deactivate	Customer Feedback
	Total:			2 Project(s)

Below the table is a 'Usage Tips' box with the text: 'Deactivating a project prevents it from being selected by a user when navigating to the 'switch projects' page.' The footer of the page reads '©2002-2005 LegendSoft, Inc. All rights reserved.'

6. Enter the name of the new project, a description of the project, and a project code. Note that the project code is required, but is currently unused by the system. The project description is displayed to users when switching between projects.

Figure VIII-4

The screenshot shows the SPOTS Service and Problem Tracking System interface. At the top, there is a navigation bar with links: home, main menu, switch projects, logoff, cust search, company report, project report, new service order, and s/o search. The current project is 'Network Operations'. The main content area is titled 'Enter New Project Information' and includes a note: '(The new project may take several minutes to propagate throughout the system.)'. Below this is a form with the following fields and options:

- Project Name: [Text Input]
- Description: [Text Input]
- Project Code: [Text Input]
- Active Status: Active Inactive
- Use Company Service Order Template:
- View Company Ticket / Service Order Attributes (link)
- Create [Button] Reset [Button]

- Specify whether or not the status of the project is *Active* or *Inactive*.

Users may not switch to inactive projects because they are not listed on the *switch projects* page. Projects are usually made inactive once they are no longer in use, but are still needed for reference purposes.

New projects are typically created with an active status. However, after initially creating an active project, you may want to switch to the project (i.e. make it your current project) and then deactivate it. This would allow you to complete your configuration of the project or change its security settings prior to making it available to other users.

- If you wish to use your account's service order template as the basis for your project's configuration, check the *Use Company Service Order Template* checkbox.

A service order template is used when you anticipate the need for multiple projects. This template should be configured to contain configuration elements that are common to all of your projects. Significant time and effort can be saved by then applying the template over and over again as a basis for each new project that you create. (Click the *View Company Ticket / Service Order Attributes* link to view or edit the template.)

- Click the *Create* button. The new project will be created and displayed in the project administration page shown in Figure VIII-4.

Once a project is created, you can click the *switch projects* link at the top of the page, make it your current project, and customize the project according to your needs.

IX. How to Create a Standard User

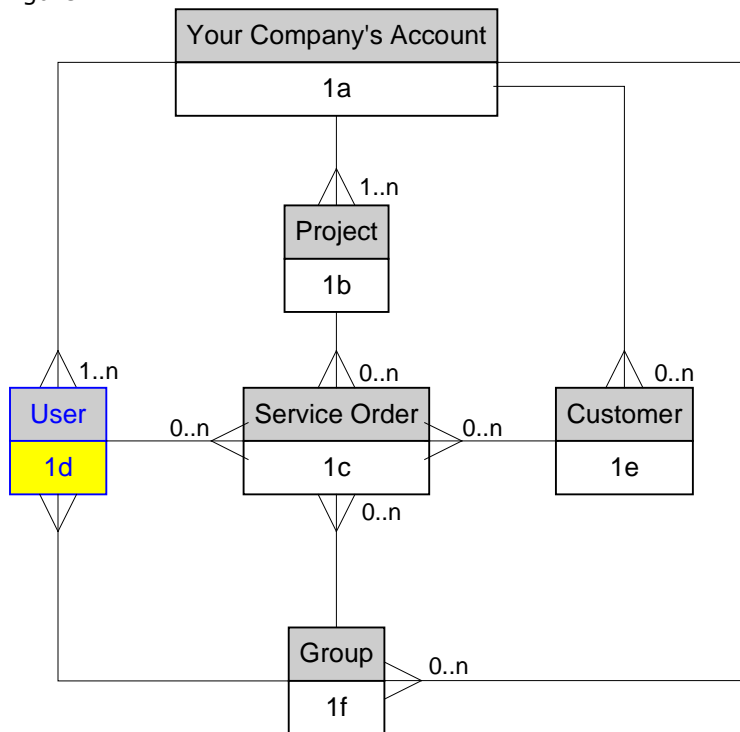
A. *Overview, Intended Audience, and Prerequisites*

This section is intended for account administrators. It describes how to create a new *standard* user (as opposed to a *portal* user). If you've just registered for a new account and are logging into the system for the first time, you are logging into the system as a standard user that is also designated as a company / account administrator.

A standard user can have full access to all system functionality, while a portal user's access to system functionality is greatly limited. Standard users are usually created for your employees and individuals

working internally at your business. Portal users are usually created for your customers or individuals external to your business. Portal users can only create and view tickets / service orders they themselves have created while standard users can run reports, switch between projects, view and edit customer data, and access all other system functionality.

Figure IX-1



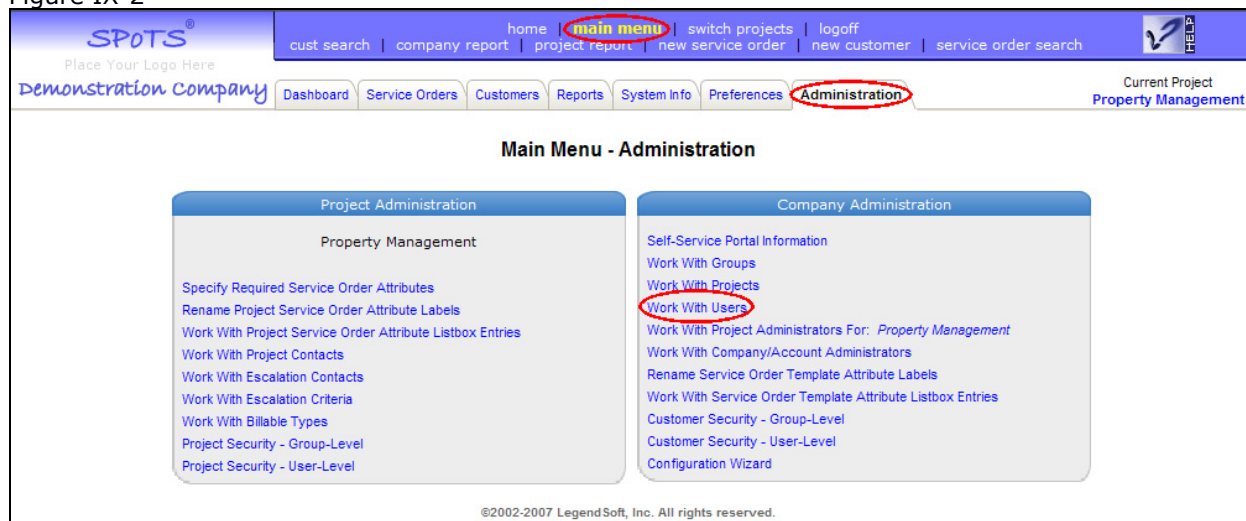
Note: You may create as many users as necessary. Because SPoTS uses concurrent licensing, no additional cost will be incurred when creating additional users. You may also create generic user IDs if it suits your business needs. For example, you could create a user with an ID equal to "support" and instruct all support personnel to use this single ID. (Multiple individuals can login using the same ID simultaneously.)

B. Configuration Overview

Please refer to Figure IX-2 when following steps 1 through 3 below.

1. To create a new user, login as a company/account administrator.
2. Click the *main menu* link at the top of the page.
3. Click the *Administration* tab.
4. Click the *Work With Users* link in the *Company Administration* box. A page will be displayed listing all of the users currently contained within your account.

Figure IX-2



5. Click the *Create a New User for Your Company* link as shown in Figure IX-3.

Refer to Figure IX-4 for steps 6 – 13.

6. Enter the *Username*. The username is entered when logging into the system and uniquely identifies a user within your account. If a trouble ticket / service order is assigned to an individual, the username is used to identify the individual.
7. Enter a password for the user. The password must contain at least 8 characters, 3 of which must be numeric.
8. Optionally enter the user's first name, middle initial, last name, description, phone number, and location.
9. Enter the time zone where the user resides. Specifying the time zone will cause the system to automatically adjust all times within the system to be displayed in the user's local time.
10. Enter the name of the customer associated with the user. Associating a user with a customer causes the *customer* field in new tickets to be pre-populated with the specified customer's name.
11. Specify that the user is a standard user by selecting the *Standard User* radio button.
12. If you would like the user to be able to edit the information on this page himself, be certain to check the *User Can Edit This Information* checkbox. This allows the user to change their password, first name, middle initial, last name, description, phone number, location, time zone, and customer association by clicking on the *Edit My User Information* link from the *Preferences* tab on the main menu.
13. Select the *Active* or *Inactive* radio button. If a User's Status is Inactive, it prevents that User from being used in the creation of Tickets / Service Orders. It also prevents the User from logging in to the system.
14. Click the *create* button.

Figure IX-3

SPOTS[®] Service and Problem Tracking System

home | main menu | switch projects | logoff
 cust search | company report | project report | new service order | s/o search

Current Project: **test**

Administer Users For Your Company
 Changes may take up to 120 seconds to propagate through the system.

Create a New User for Your Company

		UserName	First Name	M.I.	Last Name	Phone Number	Portal User		Active	
Edit	Delete	admin-57	James		Fischer			Configure e-Mail	true	Deactivate
Total:			1 User(s)							

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Figure IX-4

SPOTS[®] Place Your Logo Here
 Demonstration Company

home | main menu | switch projects | logoff
 cust search | company report | project report | new service order | s/o search

Current Project: **Property Management**

(The new user may take several minutes to appear throughout the system.)

Enter New User Information

(User Name and Password are case-sensitive.)

Username:

Password:

Confirm Password:

First Name:

Middle Initial:

Last Name:

Description:

Phone Number:

Location:

Time Zone:

Customer Association:

User Type: Standard User Portal User

Default Project:

Allow Portal User Access to All Service Orders for Their Default Project

User Can Edit This Information

Active Status: Active Inactive

Usage Tips

- ◆ If a User's Status is *Inactive*, it prevents that User from being used in the creation of Tickets / Service Orders. It also prevents the User from logging in to the system. Clearing the *User Can Edit This Information* checkbox, prevents the user from changing their own password, phone number, location, etc.
- ◆ A user designated as a *Portal User* may only access the SPoTS[®] Self-Service Portal and may not access the system through the standard login page. The Self-Service Portal is intended to enable your customers to create their own Service Orders. Instructions for accessing the Self-Service Portal are provided after creating a new Portal User, or when editing an existing Portal user. After creating a Portal User, you may wish to [configure SPoTS[®] to display your company logo](#). You may also wish to customize the target URL of the [home page](#) hyperlink at the top of the page.
- ◆ Associating a User with a Customer causes the *Customer* field in new Service Orders to be pre-populated with the specified customer's name. New Service Orders created by Self-Service Portal Users will automatically be associated with Customer specified in the *Customer Association* field.
- ◆ Click the *Allow Portal User Access to All Service Orders for Their Default Project* checkbox to allow a Portal user to view all Service Orders associated with their default project. Clear this checkbox to allow a Portal user access only to those Service Orders with a *Reported By* field equal to the Portal user.
- ◆ Note: Your time-zone will automatically be adjusted for daylight savings time, if recognized in your area.

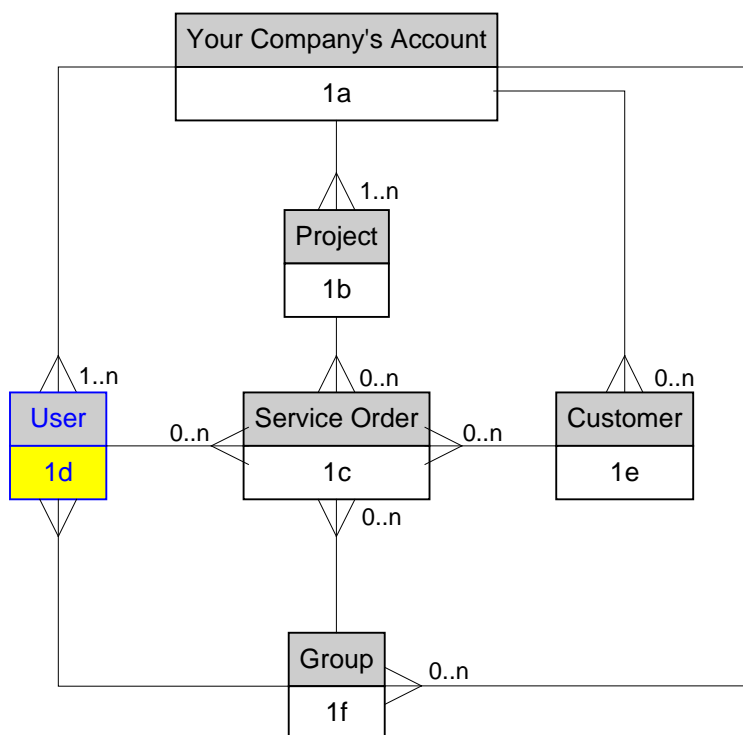
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X. How to Create a Self-Service Portal User

A. Overview, Intended Audience, and Prerequisites

This section is intended for account administrators. It describes how to create a new *Self-Service Portal* user (as opposed to a *standard* user).

Figure X-1



The Self-Service Portal enables your customers to create their own trouble tickets. You can seamlessly integrate your own company's web site with the Self-Service Portal for this purpose.

A portal user's access to system functionality is greatly limited. Portal users are usually created for your customers or other users outside of your company (vendors, etc.). Portal users can only view and update tickets / service orders they themselves have created or those that were reported by them. Additionally, portal users can only view a subset of the service order fields available to standard users. A portal user cannot view or create ticket comments, run reports, view or edit customer data, or access multiple projects.

A portal user's view of a typical ticket / service order is shown in Figure X-2.

Figure X-2

The screenshot displays the SPoTS (Service and Problem Tracking System) interface. At the top, there is a navigation bar with links for 'home', 'logout', 'View All Service Orders', 'View Unresolved Service Orders', and 'Create a New Service Order'. The main content area is divided into several sections:

- Service Order Number: 1**: A dropdown menu is set to 'Support'.
- Miscellaneous**: A text input field.
- Date and Status Information**:
 - Date Opened: Friday, October 4, 2002 9:27:23 AM
 - Priority: Low
 - Status: Closed
 - Functional Area: Service Orders - Attributes
 - Buttons: 'Notify Me When This Order Changes' and 'e-Mail This Service Order'
- Frequently Asked Question (limited to 255 characters)**: A text area containing the question: 'What if I don't want to use a particular attribute when setting up a project? For example, "Module" makes no sense for my company's business.' and the answer: 'SUPPORT ANSWERS: See resolutions tab.'
- Service Order Contents**: Descriptions: 0, Resolutions: 1, Attachments: 0
- Buttons**: 'Update' and 'Reset'
- Resolutions Table**:

Entry #	Date / Time	Author	Resolution
1	Friday, October 4, 2002 9:53:59 AM	custsrv1	If a particular field will not be used by your company follow these steps: 1) Login as a Company Administrator. 2) Click the "main" link at the top of the page. 3) Click the "switch project" link at the top of the page and select the appropriate project. 4) Click the "administration" tab. 5) In the "Project Administration" box on the left-hand side of the page.

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B. Configuration Overview

Please refer to Figure IX-2 when following steps 1 through 3 below.

1. To create a new user, login as a company/account administrator.
2. Click the *main menu* link at the top of the page.
3. Click the *Administration* tab.
4. Click the *Work With Users* link in the *Company Administration* box. A page will be displayed listing all of the users currently contained within your account. Note the value specified in the *Portal User* column for each user.
5. Click the *Create a New User for Your Company* link as shown in Figure IX-3.

Refer to Figure X-3 for steps 6 – 15.

6. Enter the *Username*. Any trouble ticket / service order created by the portal user will initially have its *Reported By* field set equal to this username. Additionally, the service order *author* field will be set to this username.
7. Enter a password for the user. The password must contain at least 8 characters, 3 of which must be numeric.
8. Optionally enter the user's first name, middle initial, last name, description, phone number, and location.
9. Enter the time zone where the user resides. Specifying the time zone will cause the system to automatically adjust all times within the system to be displayed in the user's local time.
10. Optionally enter the name of the customer associated with the user. Associating a user with a customer causes the *customer* field in new tickets (as seen only by Standard Users) to be pre-populated with the specified customer's name.
11. Specify that the user is a self-service portal user by selecting the *Portal User* radio button.

12. Select the portal user's default project from the *Default Project* drop-down listbox.

Because a portal user is limited to creating tickets / service orders within a single project, you must select a project at the time of the portal user's creation. Only an account administrator can change the default project of a portal user. (A portal user cannot switch between projects.)

13. If you would like the portal user to view all Service Orders in their Default Project, check the box labeled *Allow Portal User Access to All Service Orders for Their Default Project*. If this box is not checked, the user will only be restricted to view only those tickets whose *Reported By* field is equal to the portal user.
14. Select the *Active* or *Inactive* radio button. If a User's Status is *Inactive*, prevents the user from logging in to the system.
15. Click the *create* button.

Figure X-3

SPoTS®
Place Your Logo Here
Demonstration Company

home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Property Management

(The new user may take several minutes to appear throughout the system.)

Enter New User Information
(User Name and Password are case-sensitive.)

Username:
 Password:
 Confirm Password:
 First Name:
 Middle Initial:
 Last Name:
 Description:
 Phone Number:
 Location:
 Time Zone: Coordinated Universal Time - UTC
 Customer Association:
 User Type: Standard User Portal User
 Default Project:
 Allow Portal User Access to All Service Orders for Their Default Project
 User Can Edit This Information
 Active Status: Active Inactive

Create Reset

After creating a portal user a special page is displayed (Figure X-4). This page contains information that allows you to integrate the self-service portal with your own company's web site. Under the section entitled *Follow the instructions below to make the SPoTS Self-Service Portal available from your Company's web site*, you will find several HTML source code snippets that can be copied to your web site to allow your customers to seamlessly access SPoTS. The HTML snippet you choose depends upon the security mechanism you choose to employ when your customers access SPoTS. Choose from one of the following options:

1. The first HTML snippet requires that your customer(s) enter your SPoTS company / account name, the portal username, and password.
2. The second HTML snippet requires that your customer(s) enter the portal username and password.
3. The third HTML snippet requires that your customer(s) enter only a password.
4. The fourth HTML snippet provides immediate and unsecured access to the portal for your account. (The customer is not required to enter any information.)

Figure X-4

[Click Here to Continue Administering Users](#)

Self-Service Portal Usage Tips

Congratulations, you have just created or modified a Self-Service Portal user.

It is important to note that Self-Service Portal users have limited functionality available to them. This functionality includes:

- 1) The ability to create new Service Orders.
- 2) The ability to view resolved and unresolved Service Orders that the Portal user has previously created.
- 3) The ability to e-mail the aforementioned Service Orders.

Note that Self-Service Portal users cannot:

- View Service Orders reported by other users.
- View the Service Order Comments tab.
- Create Service Order *Resolution* entries.
- Switch from one project to another.
- Access SPoTS[®] administrative functionality.
- Access SPoTS[®] Customer Relationship Management functionality.

Click [here](#) for more information regarding the Self-Service Portal.

Follow the instructions below to make the SPoTS[®] Self-Service Portal available from your Company's web site.
(Note: Clicking the sample links below will log you out of your account.)

These instructions will help you to create a link leading to the SPoTS[®] Self-Service Portal from your company's web site, thereby enabling your customers to report problems, submit service requests, or suggest enhancements to your products and services.

- To allow this Self-Service Portal user to access SPoTS[®] by entering their Company, Username, and Password, cut-and-paste the following fragment of HTML code into your company's web site:

```
<a href="http://www.troubleticketsoftware.com/spot/CustomerPortal">Submit a Trouble Ticket</a>
```

This is the most secure method of providing access to the Self-Service portal.
Sample link: [Submit a Trouble Ticket](#)
- To allow this Self-Service Portal user to access SPoTS[®] by entering their Username and Password, cut-and-paste the following fragment of HTML code into your company's web site:

```
<a href="http://www.troubleticketsoftware.com/spot/CustomerPortal?I0=ACME+Corporation">Submit a Trouble Ticket</a>
```

This is a secure method of providing access to the Self-Service portal.
Sample link: [Submit a Trouble Ticket](#)

The following notes will help you use the Self-Service Portal in the most effective manner:

- Each portal user can be associated with a different customer.
- Each portal user can be associated with a different project.
- You can create as many portal users as necessary and each of these portal users can be associated with any combination of customer and project.
- The tickets for one portal user cannot be accessed by another portal user unless the portal user is given access to all tickets within their default project.
- While a portal user can view service order resolution entries, they cannot create resolution entries.
- A portal user can create as many description entries as necessary when creating or modifying a ticket.
- Ticket / service order comments are always hidden from portal users. This allows standard users to confidentially comment on tickets created by your customers via the Self-Service Portal.
- If the portal user is not given access to all tickets / service orders in their default project, only tickets / service orders with a *Reported By* field equal to the username of the portal user are displayed through the Self-Service Portal. Therefore, a standard user can create a ticket on behalf of a customer and that service order can be made to display to a portal user by manually changing the *Reported By* field to the appropriate username.
- To further integrate the Self-Service Portal with your company's web site, it is helpful to customize the logo displayed in the upper left-hand corner of the browser. This customization can be made by any account administrator from the *Preferences* tab on the main menu.

XI. How to Receive e-Mail Notifications of New Service Orders

A. Overview, Intended Audience, and Prerequisites

This section describes how to configure users' e-mail addresses to receive automatic service order notifications. It is intended for account administrators. You should understand how standard system users are created in your SPoTS account prior to reading this section. To do so, please refer to the section entitled *How to Create a Standard User*.

Automatic e-Mail notifications are sent to one or more of the following entities:

1. users
2. group contacts
3. group escalation contacts
4. project contacts
5. project escalation contacts

under the following conditions:

1. When a new service order is created, either the user to whom the service order is assigned or the designated group contacts for the group to which it is assigned will receive an e-mail.
2. When a new service order is created designated contacts for the project in which it was created will receive an e-mail.
3. When a previously resolved service order is changed to "unresolved" either the user to whom the service order is assigned or the designated group contacts for the group to which it is assigned will receive an e-mail.
4. When an unresolved service order is reassigned to another party, either the user to whom the service order is assigned or the designated group contacts for the group to which it is assigned will receive an e-mail.
5. When the project escalation criteria are met for an unresolved service order, the project escalation contacts will receive an e-mail.
6. If a service order is assigned to a group and the group escalation criteria are met for an unresolved service order, the group escalation contacts will receive an e-mail.
7. If a service order reaches its due date prior to being resolved, either the user to whom the service order is assigned or the designated group contacts for the group to which it is assigned will receive an e-mail.

In SPoTS all e-mail addresses are associated with a user's username. The system will allow you to associate any number of e-mail addresses with a given username. This allows your account users to receive simultaneous notification of new tickets on their phone, pager, home computer, work computer, or any other device that has an e-mail address.

Group contacts, project contacts, group escalation contacts, and project escalation contacts are simply usernames that have been especially designated by you, an account administrator, into one of these categories.

This section will guide you through the process of configuring e-mail addresses for your account usernames.

B. Configuration Overview

Please refer to figure XI-1 in steps 1 – 4 below.

1. Login to your account as a company administrator. (The username provided to you at registration is a company administrator.)
2. Click the *main menu* link at the top of your browser.
3. Select the *Administration* tab.
4. Click the *Work With Users* link.

Figure XI-1

The screenshot shows the ACME, Inc. web application interface. The top navigation bar includes links for home, main menu, switch projects, logoff, cust search, company report, project report, new service order, new customer, and service order search. The current project is Network Operations. The Administration menu is highlighted, and the Main Menu - Administration is displayed. The Main Menu - Administration is divided into Project Administration and Company Administration. The Project Administration section includes Network Operations and links for specifying required service order attributes, renaming project service order attribute labels, working with project service order attribute listbox entries, project contacts, escalation contacts, escalation criteria, billable types, and security. The Company Administration section includes self-service portal information, work with groups, work with projects, work with users, work with project administrators, work with company/account administrators, renaming service order template attribute labels, working with service order template attribute listbox entries, customer security, and a configuration wizard.

5. Click the *Configure e-Mail* link in the row containing the user whose e-mail addresses you wish to configure as shown in Figure XI-2.

Figure XI-2

The screenshot shows the ACME, Inc. web application interface. The top navigation bar includes links for home, main menu, switch projects, logoff, cust search, company report, project report, new service order, new customer, and service order search. The current project is Network Operations. The Administer Users For Your Company page is displayed, showing a table of users. The table has columns for Username, First Name, M.I., Last Name, Phone Number, Portal User, Active, and Deactivate. The 'Configure e-Mail' link for the user 'kjacobson' is highlighted.

			UserName	First Name	M.I.	Last Name	Phone Number	Portal User	Active	
Edit	Delete	Configure e-Mail	GenericCustomer				404-555-1212	yes	true	Deactivate
Edit	Delete	Configure e-Mail	adamsc	Christie		Adams	404-555-1212		true	Deactivate
Edit	Delete	Configure e-Mail	admin-57	James		Fischer			true	Deactivate
Edit	Delete	Configure e-Mail	bankerr	Richard		Banker	770-555-1212		true	Deactivate
Edit	Delete	Configure e-Mail	kjacobson	Kelly		Jacobson	888-220-5810		true	Deactivate
Edit	Delete	Configure e-Mail	washk	Kevin		Wash	678-555-1212		true	Deactivate
Total:			6 User(s)							

6. This page will display all e-mail addresses already configured for the user. If no addresses have yet been configured the list will be empty. Click the *Create A New e-Mail Address* link as shown in Figure XI-3.

Figure XI-3

The screenshot shows the ACME, Inc. web application interface. The top navigation bar includes links for home, main menu, switch projects, logoff, cust search, company report, project report, new service order, and s/o search. The current project is test. The Administer User's e-Mail Addresses page is displayed, showing a table of e-mail addresses. The 'Create A New e-Mail Address' link is highlighted.

	e-Mail Address	Description
Total:	0 Address(es)	

7. Enter the user's e-mail address information and click the *Create e-Mail* button as shown in figure XI-4.

Figure XI-4

ACME, Inc. | home | main menu | switch projects | logoff | cust search | company report | project report | new service order | s/o search | HELP

Current Project: **test**

Enter New e-Mail Address Information

e-Mail Address: @

e-Mail Address Description:

Usage Tips

Entering an e-mail address for a user will allow SPoTS to send notification to the user when a newly created Service Order is assigned to the user, or to a group to which the user belongs. If a user has more than one address, SPoTS notification e-mails will be sent to all the user's addresses.

8. The e-mail address will then be displayed in the list of e-mail entries for the user as shown below in Figure XI-5.

Figure XI-5

ACME, Inc. | home | main menu | switch projects | logoff | cust search | company report | project report | new service order | s/o search | HELP

Current Project: **test**

Administer User's e-Mail Addresses

[Create A New e-Mail Address](#) | [Back To Administer Users](#)

e-Mail Address		Description
Edit	Delete	jaconbsonk@legendsoft.net
		Work e-mail address.
Total:	1 Address(es)	

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9. Repeat steps 6 through 8 until you have entered all the e-mail addresses for the selected user.

XII. How to Change Service Order Attribute Labels

A. Overview, Intended Audience, and Prerequisites

This section describes how to change or customize a service order field (attribute) label. It is intended for account administrators. In order to customize service order attribute labels you must have first registered for an account and created at least one project. You should review the following sections prior to proceeding with this section:

1. *Application Architecture*
2. *How to Create a New Project.*

And in the *What Is* section:

3. The *What is a Service Order* sub-section.
4. The *What is a Project* sub-section.
5. The *What is a Service Order Attribute* sub-section.

In SPoTS service order fields are referred to as *service order attributes*. Names of these attributes are referred to as *attribute labels*. Service orders attribute labels can be configured to suit your business needs.

Service order attributes and their associated labels are configured on a project-by-project basis. That is, the attribute labels can be configured differently for each of your projects.

The following points are noteworthy when considering changing service order attribute labels.

- All existing service orders will reflect the labels you enter. Therefore, it is best to configure attribute labels for a project before you begin using it.
- Changing a service order attribute label has no effect on the contents of its associated listbox entries. Therefore, in most cases you will probably want to configure the attribute labels before defining the contents of the associated service order attribute listboxes. Following this procedure can prevent confusing one attribute with another when defining service order attribute listbox entries.

B. Configuration Overview

1. Login to your account as an administrator.
2. Click the *switch projects* link at the top of your browser as shown in Figure XII-1.

Figure XII-1



3. Select the project from the switch projects page for which you want to customize the service order attribute labels as shown in Figure XII-2.

Figure XII-2

	Name	Project Code	Description
Select	Network Operations	Network Operations	Project created by the Express Setup Wizard.
Select	Customer Service	CS1	Customer Feedback

4. Select the *administration* tab.
5. Select the *Rename Project Service Order Attribute Labels* link from the *Project Administration* box on the left-hand side of the page as shown in figure XII-3.

Figure XII-3

6. On this page (Figure XII-4) you can enter the desired attribute labels for your currently selected project into any of the editable text boxes. (The labels are initially populated with default values when the project is first created.)

Note that the attribute fields marked with an asterisk are fields visible to Self-Service Portal users. If you anticipate using the currently selected project with the Self-Service Portal, special care should be taken when specifying these labels. For more information regarding the Self-Service Portal, please refer to the sections entitled *What is the Self-Service Portal* and *How to Create a Self-Service Portal User*.

Figure XII-4

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Usage Tips

Customize Service Order Attribute labels for project **Network Operations** by entering the desired text next to its associated field.

*. Field visible on the Self-Service Portal.

Report Service Order To

* Group: Individual:

Group Individual

Date Resolved: January 1, 2000 Date Opened: January 1, 2000

<input type="text" value="Urgency"/>	<input type="text" value="3 - Tomorrow"/>	<input type="text" value="Severity"/>	<input type="text" value="N/A"/>
Reported By: <input type="text" value="GenericCustomer"/>	<input type="text" value="Status"/>	<input type="text" value="New"/>	<input type="text" value="N/A"/>
<input type="text" value="Category"/>	<input type="text" value="Type"/>	<input type="text" value="N/A"/>	<input type="text" value="N/A"/>
<input type="text" value="Product/System"/>	<input type="text" value="Reported Version: N/A"/>	<input type="text" value="Resolved Version: N/A"/>	
<input type="text" value="Phase"/>	<input type="text" value="N/A"/>		

Unresolved Resolved

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- After you've entered your custom labels click the *Update* button.

XIII. How to Change Service Order Attribute Listbox Entries

A. Overview, Intended Audience, and Prerequisites

This section describes how to change service order attribute listbox entries. It is intended for account administrators. In order to customize service order attribute listbox entries you must have first registered for an account and created at least one project. You should review the following sections prior to proceeding with this section:

1. *Application Architecture*
2. *How to Create a New Project.*

And in the *What Is* section:

3. The *What is a Service Order* sub-section.
4. The *What is a Project* sub-section.
5. The *What is a Service Order Attribute* sub-section.

In SPoTS service order fields are referred to as *service order attributes*. Names of these attributes are referred to as *attribute labels*. Many service order attributes have a drop-down listbox associated with them. These listboxes contain *service order attribute listbox entries*. Service orders attribute listbox entries can be configured to suit your business needs.

Service order attributes, their associated labels, and their associated listbox entries are configured on a project-by-project basis. That is, the listbox entries can be configured differently for each of your projects.

The following points are noteworthy when configuring service order attribute listbox entries:

- All existing service orders will reflect the changes you make. For example, if you modify an existing listbox entry from "blue" to "green" all existing service orders whose attribute was set to "blue" will now have the attribute set to "green". Therefore, it is best to configure attribute listbox entries for a project before you begin using it.
- In most cases you will probably want to configure service order attribute labels before defining the contents of the associated service order attribute listboxes. Following this procedure can prevent confusing one attribute with another when defining the service order attribute listbox entries. For information regarding the customization of service order attribute labels refer to the section entitled *How to Change Service Order Attribute Labels*.

B. Configuration Overview

1. Login to your account as an administrator.
2. Click the *switch projects* link at the top of your browser as shown in Figure XIII-1.

Figure XIII-1



3. Select the project from the switch projects page for which you want to customize the service order attribute listbox entries as shown in Figure XIII-2.

Figure XIII-2

ACME, Inc.

home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
test

Select A Default Project

	Name	Project Code	Description
Select	Network Operations	Network Operations	Project created by the Express Setup Wizard.
Select	Customer Service	CS1	Customer Feedback

4. Select the *administration* tab.
5. Select the *Work With Project Service Order Attribute Listbox Entries* link from the *Project Administration* box on the left-hand side of the page as shown in figure XIII-3.

Figure XIII-3

SPOTS[®]
Service and Problem Tracking System

home | main menu | switch projects | logoff
cust search | company report | project report | new service order | new customer | service order search

Current Project
Network Operations

Dashboard | Service Orders | Customers | Reports | System Info | Preferences | **Administration**

Main Menu - Administration

Project Administration

Network Operations

- Specify Required Service Order Attributes
- Rename Project Service Order Attribute Labels
- [Work With Project Service Order Attribute Listbox Entries](#)
- Work With Project Contacts
- Work With Escalation Contacts
- Work With Escalation Criteria
- Work With Billable Types
- Project Security - Group-Level
- Project Security - User-Level

Company Administration

- Self-Service Portal Information
- Work With Groups
- Work With Projects
- Work With Users
- Work With Project Administrators For: *Network Operations*
- Work With Company/Account Administrators
- Rename Service Order Template Attribute Labels
- Work With Service Order Template Attribute Listbox Entries
- Customer Security - Group-Level
- Customer Security - User-Level
- Configuration Wizard

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8. On this page (Figure XIII-4) you can choose the listbox whose contents need modification.

Note that the attribute fields marked with an asterisk are fields visible to Self-Service Portal users. If you anticipate using the currently selected project with the Self-Service Portal, special care should be taken when specifying the contents of these listboxes. For more information regarding the Self-Service Portal, please refer to the sections entitled *What is the Self-Service Portal* and *How to Create a Self-Service Portal User*.

9. Choose a listbox to customize by clicking on the attribute listbox label (Figure XIII-4). This link will take you to a page where the contents of the listbox can be edited. (Figure XIII-5)

Figure XIII-4

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Usage Tips

Use this page to edit Attribute Listbox Entries and to select the default entry in each Attribute Listbox when creating new Service Orders. Click on the blue Attribute Labels below to modify the listbox entries for: **Network Operations**. You may also select one entry in each Attribute Listbox and click the "Set Defaults" button to use that selection as the default for new Service Orders. Selecting a default "Group" or "Individual" affects all projects across your company; therefore, only company administrators have the authority to select a default entry for these two Attribute Listboxes. (The "Reported Version" and "Resolved Version" listboxes must contain the same entries.)

* - Field visible on the Self-Service Portal.

Report Service Order To
* Group: Individual:
 Group Individual

* Contact Information

Date Resolved: **Urgency:** 3 - Tomorrow
Reported By: admin-57
Category: N/A
Product/System: N/A
Phase: N/A

Date Opened: **Severity:** N/A
Status: New
Type: N/A
Reported Version: N/A
Resolved Version: N/A

Unresolved Resolved

* Summary (limited to 255 characters)

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Figure XIII-5

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Administer Service Order Urgency Attribute Listbox Entries For Project: Network Operations
Changes may take up to 120 seconds to propagate through the system.

[Add A Urgency Entry From Your Company's Service Order Template](#) [Create a New Urgency Attribute Listbox Entry](#) [Back To Service Order Attribute Listbox Entries](#)

Urgency		Active
Edit	Delete	1 - Immediate
Edit	Delete	2 - Today
Edit	Delete	3 - Tomorrow
Edit	Delete	4 - Day After Tomorrow
Edit	Delete	5 - Within Three Days
Edit	Delete	6 - Within Five Days
Edit	Delete	7 - Within Ten Days
Edit	Delete	8 - When Possible
Edit	Delete	8 - Within Thirty Days
Total:		9 entries

Usage Tips

Modifying Project Attribute Listbox Entries has no effect on your Company Service Order Template.

10. The *Administer service Order Attribute Listbox Entries* page (Figure XIII-5) lists any current listbox entries. To change the text of an existing entry, select the *Edit* link in the appropriate row and continue with step 18.

11. To delete an existing entry, select the *Delete* link in the corresponding row.

Note that you will be unable to delete an entry if an existing service order is already using the value. If this is the case you have two options:

- a) Deactivate the entry. This will prevent it from being used in new service orders but will allow service orders already using the value to remain unchanged.
 - b) Update all service orders already using the entry to use another value. As long as no existing service orders are using the value, then entry can be permanently deleted.
12. To deactivate an existing listbox entry, select the *Deactivate* link for the appropriate entry. Deactivating an entry will prevent new tickets from using the value while allowing service orders already using the entry to remain unchanged.
 13. To reactivate an existing inactive listbox entry, select the *Reactivate* link for the appropriate entry. Reactivating an entry will allow the value to be displayed in the listbox when new service orders are being created.
 14. If you wish to add a new listbox entry, there are two ways of doing so:
 - a. Click the *Create a New Attribute Listbox Entry* link to manually enter the text of the new entry. To use this method continue with step 15.
 - b. Click the *Add An Entry From Your Company's Service Order Template* link. If you've defined a Service Order Template for your account, you can copy entries from the corresponding attribute listbox in the Service Order Template to the attribute listbox in this project. (This method can help you save time and keystrokes when customizing multiple projects.) To use this method continue with step 21.
 15. Figure XIII-6 depicts the page that allows you to create a new listbox entry. Enter the desired text into the *Attribute Listbox Entry* text field.

Figure XIII-6

ACME, Inc.

home | main menu | switch projects | logoff
 cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Enter A New Urgency Attribute Listbox Entry For Project: **Network Operations**

Attribute Listbox Entry:

If the new Attribute Listbox Entry is *Active*, it will appear in the Urgency Attribute listbox when creating a new Service Order or modifying an existing Service Order. If the new Attribute Listbox Entry is *Inactive*, it must be made active before it can be used.

Active Status: Active Inactive

Create Reset

Modifying Project Attribute Listbox Entries has no effect on your Company Service Order Template.

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16. Choose the active/inactive status for the entry. In most cases, you should specify an *active* status. Choosing an *inactive* status will hide the entry from the user until some point in the future when the status of the entry is changed to *active*.

Note: Specifying the status of an entry is usually reserved for times when you wish to no longer use a particular listbox entry with new service orders. In this scenario, changing the status of an existing entry to *inactive* will prevent new tickets from using the value while allowing service orders already using the value to remain unchanged.

17. Click the *Create* button. Go back to step 10 to continue with further modifications.
18. Figure XIII-7 depicts the page that allows an existing listbox entry to be modified. Simply change the text of the listbox entry by modifying its text.

Note that modifying the text of the entry will affect all service orders currently using the value. Therefore, care should be taken when changing attribute listbox entries in projects that already have service orders. For example, if you were to change a "temperature" attribute listbox entry from "hot" to "cold", all pre-existing service orders that were formerly "hot" will have a value of "cold" after the change.

19. Specify the active status of the entry. Changing the status of an existing *active* entry to *inactive* will prevent new tickets from using the value while allowing service orders already using the value to remain unchanged.
20. Click the *Update* button. Go back to step 10 to continue with further modifications.

Figure XIII-7

ACME, Inc.

home | main menu | switch projects | logoff
 cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Edit Urgency Attribute Listbox Entry For Project: Network Operations

Attribute Listbox Entry:

If the Attribute Listbox Entry is *Active*, it will appear in the Urgency Attribute listbox when creating a new Service Order or modifying an existing Service Order. If the Attribute Listbox Entry is *inactive*, it will only appear in the listbox of existing Service Orders already using the Attribute.

Active Status: Active Inactive

Modifying Project Attribute Listbox Entries has no effect on your Company Service Order Template.

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21. Figure XIII-8 shows all corresponding attribute listbox entries from your company service order template not already used in your currently selected project. To add one of these entries to your current project, select the *Add* link.


Note: If no entries are displayed on the page it indicates that either no entries have been created in your company's service order template or that all corresponding attribute entries in the service order template are already being used in the currently selected project.

22. Go back to step 10 to continue with further modifications.

Figure XIII-8

ACME, Inc.

[home](#) | [main menu](#) | [switch projects](#) | [logoff](#)
[cust search](#) | [company report](#) | [project report](#) | [new service order](#) | [s/o search](#)



Current Project
Network Operations

Select an Attribute Listbox Entry From Your Company Service Order Template to add to the Urgency Attribute Listbox Entries for Project: **Network Operations**

	Company Attribute	Company Default
Add	10 - Within Forty Days	false
Add	11 - Within Sixty Days	false

Select any of the Attributes Listbox Entries from your Company's Service Order Template above to include the Attribute Listbox Entry in your Project.

XIV. How to Purchase Licenses

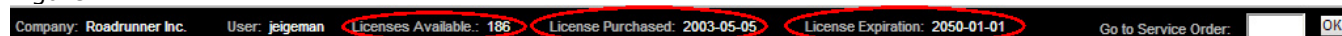
A. **Overview, Intended Audience, and Prerequisites**

This section describes how to purchase licenses for your account. It is intended for all users. If you are unfamiliar with how your SPoTS account is licensed or if you aren't sure how many licenses you need, please refer to the section entitled *What is Concurrent Licensing*.

After you log in to your account, the following licensing information is displayed in the status bar along the bottom of your browser as shown in Figure XIV-1:

1. The date the license was purchased.
2. The date the license expires.
3. The number of licenses still available for other users.

Figure XIV-1



If the license allocated to you will expire in 30 days or less, the license expiration date will be displayed in a bold red font. At any time you may click on the license expiration date to display all the licensing information for your account.

Don't worry; your account information will not be immediately deleted if all of your licenses expire. If you do allow all the licenses to expire, the system will automatically redirect you to the account licensing page upon logging in to your account. You will then be able to renew your licenses and regain access to your account information.

However, we will not maintain your account indefinitely if all your account licenses expire. LegendSoft may terminate your account and delete all information contained therein if 30 days have elapsed subsequent to the last expiration date of the last valid license for your account.

B. **Configuration Overview**

To purchase new licenses follow these steps:

1. Login to your account.
2. Click on the *System Info* tab and choose the *View / Purchase Licenses* link in the *Company Information* box as shown in Figure XIV-2.

Figure XIV-2

- The *Company Licenses* page displays information regarding the licenses for your account (Figure XIV-3), including the date of purchase, date of expiration, the name of the individual who purchased the license, and which user is actively using a license.

Click the *Purchase New Licenses for <account name>* link to specify the number and length, or term, of the licenses you wish to purchase. Licenses may be purchased online with a credit card. As with all SPoTS transactions, any information transferred to our servers during the purchase is encrypted via Secure Sockets Layer (SSL).

Figure XIV-3

Company Licenses (sorted by expiration date)					
License Number	Expiration date	Date of Last Purchase / Renewal	Purchased By	Currently in Use By	License Expired
1	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James	admin-57	no
2	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no
3	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no
4	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no
5	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no
6	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no
7	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no
8	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no
9	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no
10	Monday, July 3, 2006 7:30:15 PM	Tuesday, April 4, 2006 7:51:53 PM	Fischer, James		no
Total:	10 License(s)				

- Enter all requested information into the *Purchase New Licenses* page (Figure XIV-4) and click the *Next* button. Prior to completing the transaction, you will be presented with the final purchase price and the Terms and Conditions governing the usage of your account (Figure XIV-5).

Figure XIV-4

(Fields in blue are required.)

Enter the number of licenses to purchase

Licenses

Enter the term of the license purchase

Month(s)

Enter your name as it appears on your credit card

First Name:

Middle Initial:

Last Name:

Enter your credit card billing information

Phone Number:

Attention:

Address Line 1:

Address Line 2:





City:

State / Province:

(Please select "other" if your address is outside the US or Canada.)

Zip Code:

Country:



Credit Card Type:

Credit Card Number:

Credit Card Expiration Date: Month: Year:

Credit Card Security Code:

Your credit card security code is either 3 digits or 4 digits located in one of the following locations:

5. Verify the amount of your purchase, the number of licenses you're purchasing, the term of the licenses, your payment information, and the Terms and Conditions.

Figure XIV-5

Please Verify Your Purchase

Your Total Purchase Cost

\$1553.50

Number and term of license(s)


Number of Licenses: **10 License(s)**
Term of each license: **13 Month(s)**

Your name as it appears on your credit card

First Name: James
Middle Initial:
Last Name: Fischer

Your credit card billing information

Phone Number: 404-555-1212
Attention:
Address Line 1: 800 Jones Road
Address Line 2:
City: Atlanta
State / Province: **GA**
Zip Code: 30342
Country: **US**




Credit Card Type: American Express

Credit Card Number: xxxxxxxxxxxxxxxxxxxx

Credit Card Expiration Date: Month: 05 Year: 2006

Credit Card Security Code: 4873

Your credit card security code is either 3 digits or 4 digits located in one of the following locations:



e-Mail Address: **james@fischer.net**

Terms and Conditions

This End-User License Agreement (hereinafter "Agreement") is by and between LegendSoft, Inc., a Georgia corporation, and the company (or other entity) acknowledging this Agreement (hereinafter "Customer"). By checking the box indicating that "I accept the terms and conditions", Customer and LegendSoft Inc., agree to be bound by the following terms And conditions. If Customer does not agree with these terms, Customer must not check the box and

6. If the information is accurate and you agree to the Terms and Conditions, check the *I have read and accept the Terms and Conditions* checkbox and click the *Verify* button (Figure XIV-6). After clicking the *Verify* button, your transaction will be processed (Figure XIV-7) and your licenses will immediately be added to your account and available for use.

Figure XIV-6

"SPAMMING". Customer will not store "mission critical" data on the Service, including without limitation data pertaining to power generation, national security, or any function to sustain or rescue the health or well-being of any person.

11. Indemnification

Customer agrees to indemnify and hold harmless LegendSoft, inc., and its respective officers, directors, employees, consultants, agents, licensees and licensors from any claim, demand, or damages, including reasonable attorneys' fees, arising out of or in connection with use of the Service. Customer's obligation to indemnify will survive the expiration or termination of this Agreement by either party for any reason.

I have read and accept the Terms and Conditions

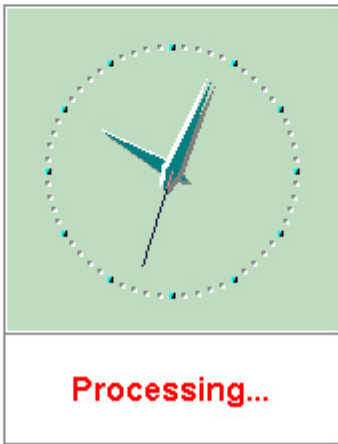
Verify Cancel

Your transaction will take a minute or two to be processed. While it is being processed, please do not click the back button in your browser or re-submit the transaction. If your credit card is accepted, your new licenses will be displayed to you in the *Company Licenses* page.

Figure XIV-7

Please Wait While Your Payment Is Processed

Your payment should be processed within a few seconds.
However, the process could take up to 2 minutes.
Please do not use the Back or Stop buttons in your browser while the payment is being processed.



Processing...

Once the processing is complete, you will be returned to the main licensing page where your new licenses, as well as your existing licenses, will be displayed.

XV. How to Designate a Project Administrator

A. Overview, Intended Audience, and Prerequisites

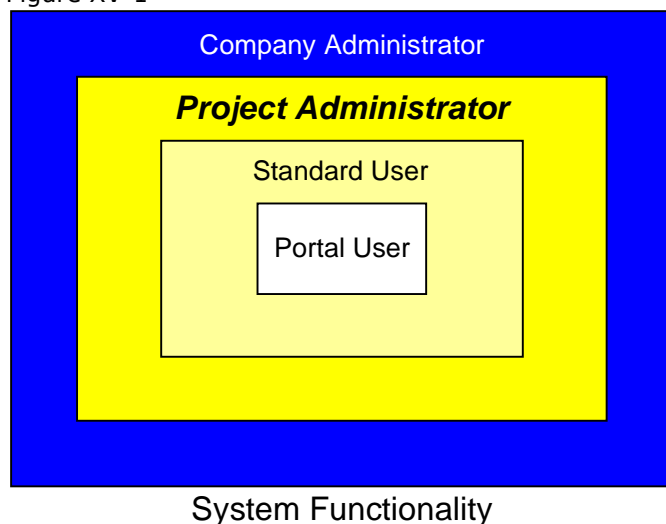
This section describes how to designate an existing user as an administrator for a single project within your account. It is intended for account administrators. You should review the following sections prior to proceeding with this section:

1. *Application Architecture*

And in the *What Is* section:

2. The *What is a Project* sub-section.
3. The *What is a User* sub-section.

Figure XV-1



There are 4 classes of users within SPoTS. These classes of users are depicted by overall access to system functionality in Figure XV-1 and ranked below in increasing order of account access:

1. Portal User
2. Standard User
3. Project Administrator
4. Company Administrator

The functionality available to a Portal User is very limited. Portal usernames are usually created for use by your customers, vendors, or those parties outside of your company to whom you wish to provide limited account access.

Standard users have full system functionality. However, standard users have no access to account configuration functionality. Among other things, for example, a standard user cannot create new users, create new projects, or edit project configuration settings.

Project administrators have all access that a standard user has. Additionally, a project administrator can make changes to project-level configuration settings for the projects where they have been designated as an administrator. However, project administrators are not provided access to company-level configuration settings. Among other things, for example, a project administrator cannot create new users or new projects.

Company administrators have all the access of standard users and project administrators. Additionally, they have full access to all account-level configuration settings.

Please note the following when designating new project administrators:

1. Project administrators can only be designated as such by account administrators.
2. Project administrators are designated on project-by-project basis. That is, a user designated as a project administrator for one project cannot administer another project unless they are also designated as an administrator for that project.
3. Account/company level administrative functionality not made available or displayed to project administrators.

B. Configuration Overview

Follow the steps below to designate a user as a project administrator.

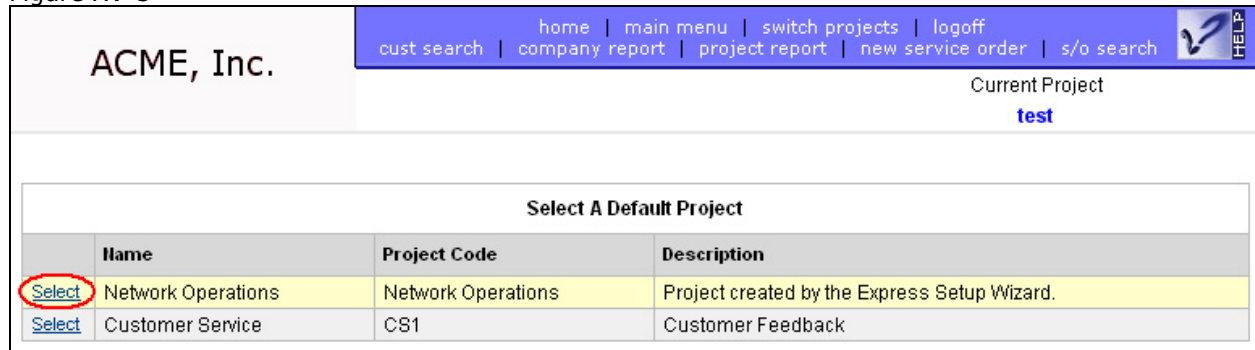
1. Login to your account as a company/account administrator.
2. Click the *switch projects* link at the top of your browser as shown in Figure XV-2.

Figure XV-2



3. Select the project from the switch projects page for which to designate an administrator as shown in Figure XV-3.

Figure XV-3



4. Select the *administration* tab.
5. Select the *Work With Project Administrators For: <project name>* link from the *Company Administration* box on the right-hand side of the page as shown in figure XV-4.

Figure XV-4



6. The next page, Figure XV-5, will display all users currently designated as project administrators for your currently selected project.
7. To remove a user from the list of project administrators, select the *Remove From Admin Group* link in the row corresponding to the appropriate user.

Figure XV-5

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Current Project Administrators For Project: **Network Operations**

[Add a New Project Administrator](#)

	Username	First Name	M.I.	Last Name	Phone Number
Remove From Admin Group	kjacobson	Kelly		Jacobson	888-220-5810
	Total:	1 User(s)			

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8. To designate a new project administrator, click the *Add a New Project Administrator* link. Clicking this link will display a list of all system users not currently designated as an administrator for the current project (Figure XV-6).
9. From this page, click the *Add to Administrator Group* link in the row corresponding to the appropriate user.

Figure XV-6

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Add A New Administrator For Project: **Network Operations**

	Username	First Name	M.I.	Last Name	Phone Number
Add to Administrator Group	admin-57	James		Fischer	
Add to Administrator Group	GenericCustomer				404-555-1212
Add to Administrator Group	bankerr	Richard		Banker	770-555-1212
Add to Administrator Group	washk	Kevin		Wash	678-555-1212
Add to Administrator Group	adamsc	Christie		Adams	404-555-1212
	Total:	5 User(s)			

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10. To designate multiple project administrators repeat steps 8 and 9.

XVI. How to Designate a Company/Account Administrator

A. Overview, Intended Audience, and Prerequisites

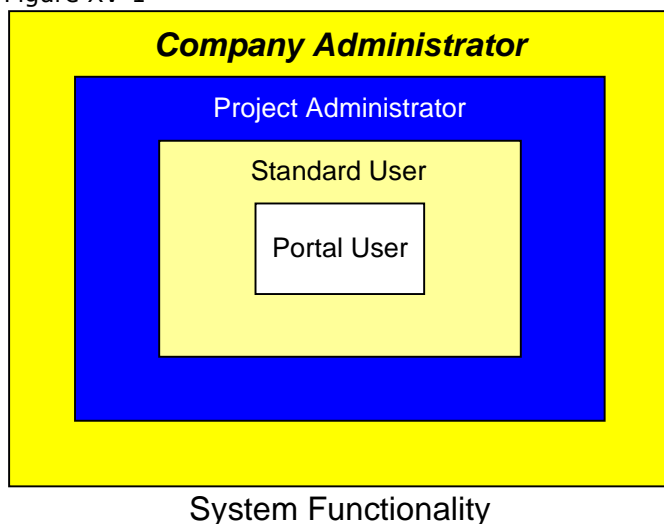
This section describes how to designate an existing user as an administrator for your account. It is intended for account administrators. You should review the following sections prior to proceeding with this section:

1. *Application Architecture*

And in the *What Is* section:

2. The *What is a User* sub-section.

Figure XV-1



There are 4 classes of users within SPoTS. These classes of users are depicted by overall access to system functionality in Figure XV-1 and ranked below in increasing order of account access:

1. Portal User
2. Standard User
3. Project Administrator
4. Company Administrator

The functionality available to a Portal User is very limited. Portal usernames are usually created for use by your customers, vendors, or those parties outside of your company to whom you wish to provide limited account access.

Standard users have full system functionality. However, standard users have no access to account configuration functionality. Among other things, for example, a standard user cannot create new users, create new projects, or edit project configuration settings.

Project administrators have all access that a standard user has. Additionally, a project administrator can make changes to project-level configuration settings for the projects where they have been designated as an administrator. However, project administrators are not provided access to company-level configuration settings. Among other things, for example, a project administrator cannot create new users or new projects.

Company administrators (also referred to as “account administrators”) have all the access of standard users and project administrators. Additionally, they have full access to all account-level configuration settings.

Please note the following when designating new company/account administrators:

1. Company/account administrators can designate any other user as a project or company administrator.
2. Company users can irrecoverably delete all account information including usernames, service orders, and entire projects.

B. Configuration Overview

Follow the steps below to designate a user as a company/account administrator.

1. Login to your account as an account administrator.
2. Select the *Administration* tab.
3. Select the *Work With Company Administrators* link from the *Company Administration* box on the right-hand side of the page as shown in figure XV-4.

Figure XV-4

The screenshot shows the ACME, Inc. web application interface. The top navigation bar includes links for home, main menu, switch projects, logoff, cust search, company report, project report, new service order, new customer, and service order search. The current project is Network Operations. The Administration tab is selected, showing a Main Menu - Administration with two columns: Project Administration and Company Administration. The 'Work With Company/Account Administrators' link in the Company Administration column is circled in red.

4. The next page, Figure XV-5, will display all users currently designated as company administrators for your account.
5. To remove a user from the list of company administrators, select the *Remove From Admin Group* in the row corresponding to the appropriate user.

Figure XV-5

The screenshot shows the ACME, Inc. web application interface displaying the Current Company Administrators page. The 'Add a New Administrator for Your Company' link is circled in red. Below the link is a table with columns: Username, First Name, M.I., Last Name, and Phone Number. The table contains one user: admin-57, James, Fischer. A 'Remove From Admin Group' link is circled in red in the first row. A 'Total: 1 User(s)' row is also present.

	Username	First Name	M.I.	Last Name	Phone Number
Remove From Admin Group	admin-57	James		Fischer	
Total:		1 User(s)			

6. To designate a new company administrator, click the *Add a New Administrator for Your Company* link. Clicking this link will display a list of all system users not currently designated as account administrators (Figure XV-6).
7. From this page, click the *Add to Administrator Group* link in the row corresponding to the appropriate user.

Figure XV-6

ACME, Inc.

home | main menu | switch projects | logoff
 cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Add A New Company Administrator

	Username	First Name	M.I. Last Name	Phone Number
Add to Administrator Group	GenericCustomer			404-555-1212
Add to Administrator Group	kjacobson	Kelly	Jacobson	888-220-5810
Add to Administrator Group	bankerr	Richard	Banker	770-555-1212
Add to Administrator Group	washk	Kevin	Wash	678-555-1212
Add to Administrator Group	adamsc	Christie	Adams	404-555-1212
	Total:	5 User(s)		

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8. To designate multiple company/account administrators repeat steps 6 and 7.

XVII. How to Secure Users and Groups

A. Overview, Intended Audience, and Prerequisites

This section describes how security can be applied to users and groups within your account. It is intended for account administrators. You should review the following sections prior to proceeding with this section:

1. *Application Architecture*
2. *How to Designate a Project Administrator*
3. *How to Designate a Company/Account Administrator*

And in the *What Is* section:

4. The *What is a Project* sub-section.
5. The *What is a Group* sub-section.
6. The *What is a Customer* sub-section.

SPoTS allows you to apply security settings to your account in a variety of ways to suit your business needs. Listed below are the different types of security available:

1. Administrative authority at the account/company level.
2. Administrative authority at the project level.
3. Customer security applied to groups.
4. Customer security applied to users.
5. Project-level security applied to groups.
6. Project-level security applied to users.

For information regarding items 1 and 2 (administrative authority), please refer to the sections entitled *How to Designate a Project Administrator* and *How to Designate a Company/Account Administrator*.

The following access levels can be applied to groups or individuals regarding access to customer information or access to specific projects:

1. Refuse all access
2. Allow read-only access
3. Allow full access

Careful consideration must be taken when applying the aforementioned security settings.

In particular, you should note the following:

1. **By default all standard users and all groups are allowed full access to all projects and all customer information.** In order to prohibit access to a project or to customer information, you must specifically preclude access to the appropriate user(s) or group(s).
2. If a user belongs to multiple secured groups, the most restrictive access of all those groups will be applied to the user.
3. SPoTS applies security by first checking settings at the Group-Level and then at the User-Level. **If User-Level security is specified for an individual, the User-Level setting unequivocally overrides any corresponding Group-Level setting.** For example, it is even possible to provide a user with full access to a project to which he or she is denied access at the group level.
4. From an administrative perspective, it is far better to apply security settings to groups rather than to individuals. This is especially true if 10 or more users will be accessing your account. Managing security settings for 10 or more people at the user level can quickly become cumbersome and time consuming.

If you create descriptive group names and apply the appropriate security settings to those groups, you can then easily add or remove users from the appropriate group to affect their access to customer data or to specific projects.

1. Access to Customer Data

Through the use of *customer security* you can prevent a user or group of users from accessing customer information. Doing so hides menu options and customer-data fields throughout the application. For example, by refusing access to all customer information, the Customer tab is no longer visible (Figure XVII-1). Applying read-only access to customer data will only prevent a user from updating or deleting customer data.

Figure XVII-1

The screenshot shows the SPOTS web application interface. The top navigation bar includes links for home, main menu, switch projects, logoff, company report, project report, new service order, and service order search. The current project is 'Software Development'. The main content area displays a list of service orders under the heading 'Service Orders - Unresolved - Software Development'. The list includes columns for Service Order #, Resolved status, and a summary of the issue. A detailed view for Service Order 24 is shown below, including fields for Project Name, Service Order #, Resolved status, Ticket Author, Reported To, Date Opened, Date Resolved, Type, Category, Due Date, Priority, Status, Severity, and Resolved Version.

Service Order #	Resolved	Ticket Author	Reported To	Reported To Group
24	No	ankning	austlane	N/A
	Date Opened	Date Resolved	Type	Category
	2005-04-29 17:45:20	Unresolved	N/A	Documentation
	Due Date	Priority	Status	Severity
	2005-05-23	Medium	Pending	N/A

2. Access to Projects

Through the use of *project security* you can prevent a user or group of users from accessing specific projects. Doing so makes it appear to the user as if the projects don't exist. For example, denying access to a project will prevent that project name from being displayed to the user when they switch projects. Additionally, information for the project to which the user has been denied access will not appear in any company-level report generated by the user.

3. Why Apply Customer or Project Security?

One of the most common reasons to use customer and/or project security is to prevent individuals from different departments within your company from accessing the other department's data. For example, while you may want the sales department to access customer information, you may want to prevent the maintenance department from accessing the same data.

Another reason to use project and/or customer access is when your company uses contract workers or consultants. You can easily allow these types of "external" workers to access information relating to their specific project while precluding access to other ongoing and unrelated projects.

B. Configuration Overview – Group-Level Customer Security

Follow the steps below to apply customer security settings to a group.

1. Login to your account as a company/account administrator.
2. Select the *Administration* tab.
3. Select the *Customer Security – Group-Level* link from the *Company Administration* box on the right-hand side of the page as shown in figure XVII-2.

Figure XVII-2



4. The next page, Figure XVII-3, will display all groups currently configured with some level of customer security. Listed in each row is the group's specific security setting.
5. To remove the group from the list, click the *Delete* link in the row corresponding to the appropriate group. Removing a group from the list is equivalent to removing the group's security restriction for access to customer data. In other words, the group you delete from the list will thereafter have full access to customer data.
6. To modify the security setting for the group, click the *Edit* link.

Figure XVII-3

Current Group-Level Security Settings for Access To Customer Data

[Specify Customer Access For An Unlisted Group](#)

Group	Current Security Specification				
Customer Service	Refuse All Access	view group members	view group contacts	Edit	Delete
Total:	1 Secured group(s)				

Usage Tips

- Use this page to specify Group-Level security settings for access to customer data. By default, groups not listed on this page have Full Access to customer data. (Please be aware that User-Level security settings override settings at the Group-Level.)
- SPoTS® applies security by first checking settings at the Group-Level and then at the User-Level. If a user belongs to multiple secured groups, the most restrictive access of all those groups will be applied to the user. If User-Level security is specified for an individual, the User-Level setting unequivocally overrides any corresponding Group-Level setting.
- Unless secured at the Group or User Level, users will by default have Full Access to customer data. In other words, if a user does not belong to a secured group or they do not belong to any group at all, and User-Level security is unspecified, the user will have Full Access to customer data.**
- PLEASE NOTE:** It is usually easier to configure security at the Group-Level than at the User-Level. By configuring settings at the Group Level, security can be easily administered for many users simultaneously. It is best to employ User-Level security to allow or prevent customer access to certain individuals who do not conform to typical security access settings within your company.

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7. Figure XVII-4 displays the page that allows you to change the group’s security setting. Choose the appropriate entry from the listbox and click the *Update* button.

Figure XVII-4

ACME, Inc.

[home](#) | [main menu](#) | [switch projects](#) | [logoff](#)
[cust search](#) | [company report](#) | [project report](#) | [new service order](#) | [s/o search](#)

Current Project
Network Operations

Edit Group-Level Customer Access Specification For: Customer Service

Select a Group-Level Security Specification

(By default, unsecured groups have Full Access to customer data.)

Use this page to specify Group-Level access to customer data. Group-level security can be overridden for a specific user through User-Level security settings.

It is usually easier to specify Group-Level security. By specifying security settings at the group level, security can be easily modified for multiple users. It is best to employ User-Level security settings to allow or prevent access to certain individuals who do not conform to the typical security access settings for your company.

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8. To specify customer security for another group, click the *Specify Customer Access For An Unlisted Group* link (Figure XVII-3). Clicking this link will display a list of all groups not already secured as shown in Figure XVII-5.

Figure XVII-5

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Select A Group For Which Access to Customer Data Should Be Secured

[Back To Secured Group List For Access To Customer Data](#)

	Group	Active		
Select	Accounts Payable	true	view group members	view group contacts
Select	Accounts Receivable	true	view group members	view group contacts
Select	Sales	true	view group members	view group contacts
Select	Product Development	true	view group members	view group contacts
	Total:	4 Unsecured group(s)		

Select a group for which access to customer data should be secured.

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- From this page, click the *Select* link in the row corresponding to the appropriate group to which you want to apply customer security.
- Select the appropriate security setting from the listbox, as shown in figure XVII-6, and click the *Add* button.

Figure XVII-6

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Add Group-Level Customer Access Specification For: **Product Development**

Select a Group-Level Customer Access Specification

Read Only Access
Refuse All Access

(By default, unsecured groups have Full Access to customer data.)

Add Cancel Reset

Use this page to specify Group-Level settings for access to customer data. (Please be aware that User-Level security settings override Group-Level settings for access to customer data.)

It is usually easier to specify Group-Level security. By specifying security settings at the Group Level, security can be easily modified for multiple users simultaneously. It is best to employ User-Level security to allow or prevent access to certain individuals who do not conform to typical security settings for your company.

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- Go back to step 4 and continue applying customer security settings until you are complete.

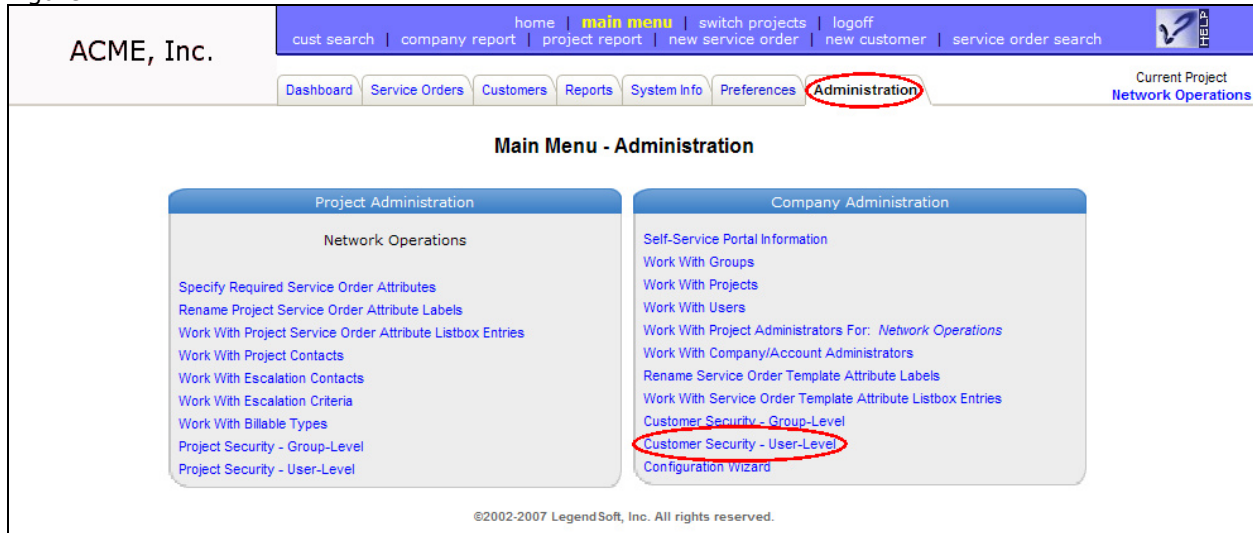
C. Configuration Overview – User-Level Customer Security

PLEASE NOTE: It is usually easier to configure security at the group level than at the user level. By configuring settings at the group level, security can be easily administered for many users simultaneously. It is best to employ user-Level security to allow or prevent customer access to certain individuals who do not conform to typical security access settings within your company.

Use the steps below to apply customer security settings to an individual user.

1. Login to your account as a company/account administrator.
2. Select the *Administration* tab.
3. Select the *Customer Security – User-Level* link from the *Company Administration* box on the right-hand side of the page as shown in figure XVII-7.

Figure XVII-7



4. The next page, Figure XVII-8, displays all users currently configured with some level of customer security. Listed in each row is the user's specific security setting.
5. To remove the user from the list, click the *Delete* link in the row corresponding to the appropriate user. Removing a user from the list is equivalent to removing the user's security restriction for access to customer data.
6. To modify the security setting for the user, click the *Edit* link.

Figure XVII-8

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Current User-Level Security Settings For Access To Customer Data

[Specify Customer Access For An Unlisted User](#)

Username	Current Security Specification	Edit	Delete
GenericCustomer	Refuse All Access	Edit	Delete
bankerr	Refuse All Access	Edit	Delete
Total:	2 Secured user(s)		

Usage Tips

- Use this page to specify User-Level security settings for access to customer data. User-Level security settings override settings at the Group-Level.
- SPoTS[®] applies security by first checking settings at the Group-Level and then at the User-Level. If a user belongs to multiple secured groups, the most restrictive access of all those groups will be applied to the user. If User-Level security is specified for an individual, the User-Level setting unequivocally overrides any corresponding Group-Level setting.
- **Unless secured at the Group or User Level, users will by default have Full Access to customer data. In other words, if a user does not belong to a secured group or they do not belong to any group at all, and User-Level security is unspecified, the user will have Full Access to customer data.**
- **PLEASE NOTE:** It is usually easier to configure security at the Group-Level than at the User-Level. By configuring settings at the Group Level, security can be easily administered for many users simultaneously. It is best to employ User-Level security to allow or prevent project access to certain individuals who do not conform to typical security access settings within your company.

7. Figure XVII-9 displays the page that allows you to change the user's security setting. Choose the appropriate entry from the listbox and click the *Update* button.

Figure XVII-9

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | new customer | service order search

Current Project
Network Operations

Edit User-Level Customer Access Specification For: bankerr

Select a User-Level Customer Access Specification

Full Access
Read Only Access
Refuse All Access

(User-Level customer access specifications override all Group-Level settings for the specified user.)

Usage Tips

- Use this page to specify User-Level security settings for access to customer information. User-Level security settings override any existing Group-Level settings for access to customer data.
- It is usually easier to specify Group-Level security. By specifying security settings at the group level, security can be easily modified for multiple users. It is best to employ User-Level security settings to allow or prevent access to certain individuals who do not conform to the typical security access settings for your company.

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8. To specify customer security for another user, click the *Specify Customer Access For An Unlisted User* link (Figure XVII-8). Clicking this link will display a list of all users not already secured as shown in Figure XVII-10.

Figure XVII-10

The screenshot shows a web application interface for ACME, Inc. The top navigation bar includes links for home, main menu, switch projects, logoff, cust search, company report, project report, new service order, and s/o search. The current project is identified as Network Operations. The main content area is titled "Select A User For Whom Customer Data Will Be Secured" and includes a link to "Back To Secured User List For Access To Customer Data". A table lists four users with columns for Username, First Name, M.I. Last Name, and Phone Number. Each user row has a "Select" link. A total row indicates 4 users. Below the table is a grey box with the instruction "Select an individual for whom you would like to specify access to customer data." and a copyright notice for LegendSoft, Inc. from 2002-2005.

	Username	First Name	M.I. Last Name	Phone Number
Select	adamsc	Christie	Adams	404-555-1212
Select	admin-57	James	Fischer	
Select	kjacobson	Kelly	Jacobson	888-220-5810
Select	washk	Kevin	Wash	678-555-1212
Total:		4 User(s)		

Select an individual for whom you would like to specify access to customer data.

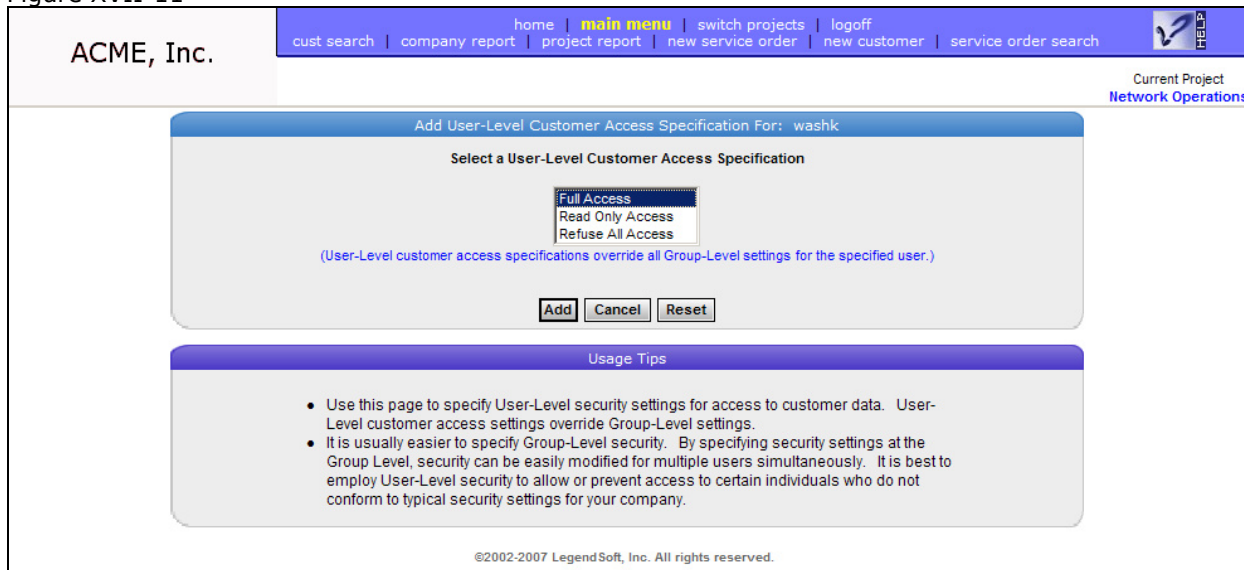
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9. From this page, click the *Select* link in the row corresponding to the appropriate user to whom you want to apply customer security.
10. Select the appropriate security setting from the listbox, as shown in figure XVII-11, and click the *Add* button.

Note that a user has full access to customer data by default. However, that same user may belong to one or more groups whose security settings prevent access to customer data.

SPoTS enables you to override security settings at the group level by applying settings at the user level. To enable this override, you will notice that the listbox contains a *Full Access* entry. Select the *Full Access* listbox entry to override any corresponding group-level customer security settings and enable the user to access customer information.

Figure XVII-11



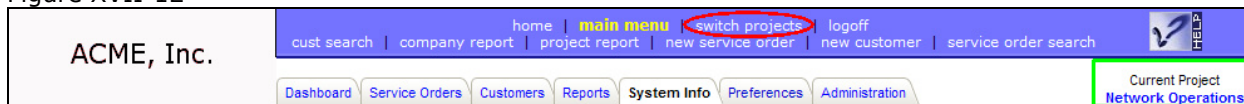
11. Go back to step 4 and continue applying customer security settings until you are complete.

D. Configuration Overview – Group-Level Project Security

Follow the steps below to apply project security settings to a group.

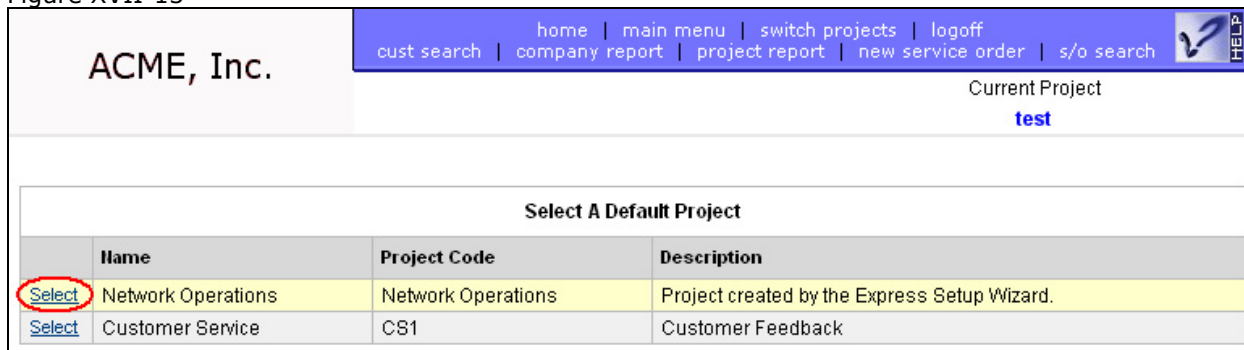
1. Login to your account as a company/account administrator.
2. Click the *switch projects* link at the top of your browser as shown in Figure XVII-12.

Figure XVII-12



3. Select the project from the switch projects page for which to apply group-level security settings as shown in Figure XVII-13.

Figure XVII-13



4. Select the *administration* tab.
5. Select the *Project Security – Group-Level* link from the *Project Administration* box on the left-hand side of the page as shown in figure XVII-14.

Figure XVII-14

ACME, Inc. home | **main menu** | switch projects | logoff
 cust search | company report | project report | new service order | new customer | service order search

Dashboard | Service Orders | Customers | Reports | System Info | Preferences | **Administration** | Current Project: Network Operations

Main Menu - Administration

Project Administration

Network Operations

- [Specify Required Service Order Attributes](#)
- [Rename Project Service Order Attribute Labels](#)
- [Work With Project Service Order Attribute Listbox Entries](#)
- [Work With Project Contacts](#)
- [Work With Escalation Contacts](#)
- [Work With Escalation Criteria](#)
- [Work With Billable Types](#)
- [Project Security - Group-Level](#)**
- [Project Security - User-Level](#)

Company Administration

- [Self-Service Portal Information](#)
- [Work With Groups](#)
- [Work With Projects](#)
- [Work With Users](#)
- [Work With Project Administrators For: Network Operations](#)
- [Work With Company/Account Administrators](#)
- [Rename Service Order Template Attribute Labels](#)
- [Work With Service Order Template Attribute Listbox Entries](#)
- [Customer Security - Group-Level](#)
- [Customer Security - User-Level](#)
- [Configuration Wizard](#)

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6. The next page, Figure XVII-15, will display all groups currently configured with some level of security for the current project. Listed in each row is the group's specific security setting.
7. To remove the group from the list, click the *Delete* link in the row corresponding to the appropriate group. Removing a group from the list is equivalent to removing the group's security restriction for access to the project data. In other words, the group you delete from the list will thereafter have full access to the project.
8. To modify the security setting for the group, click the *Edit* link.

Figure XVII-15

Current Group-Level Security Settings for Project: [Network Operations](#)

[Specify Security For An Unlisted Group](#)

Group	Current Security Specification				
Customer Service	Refuse All Access	view group members	view group contacts	Edit	Delete
Total:	1 Secured group(s)				

Usage Tips

- ◆ Use this page to specify Group-Level security settings for Network Operations. By default, groups not listed on this page have Full Access to Network Operations. (Please be aware that User-Level security settings override settings at the Group-Level.)
- ◆ SPoTS® applies security by first checking settings at the Group-Level and then at the User-Level. If a user belongs to multiple secured groups, the most restrictive access of all those groups will be applied to the user. If User-Level security is specified for an individual, the User-Level setting unequivocally overrides any corresponding Group-Level setting.
- ◆ **Unless secured at the Group or User Level, users will by default have Full Access to Network Operations. In other words, if a user does not belong to a secured group or they do not belong to any group at all, and User-Level security is unspecified, the user will have Full Access to Network Operations.**
- ◆ **PLEASE NOTE:** It is usually easier to configure security at the Group-Level than at the User-Level. By configuring settings at the Group Level, security can be easily administered for many users simultaneously. It is best to employ User-Level security to allow or prevent project access to certain individuals who do not conform to typical security access settings within your company.

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9. Figure XVII-16 displays the page that allows you to change the group’s security setting. Choose the appropriate entry from the listbox and click the *Update* button.

Figure XVII-16

ACME, Inc.

[home](#) | [main menu](#) | [switch projects](#) | [logout](#)
[cust search](#) | [company report](#) | [project report](#) | [new service order](#) | [s/o search](#)

Current Project
Network Operations

Edit Group-Level Security Specification For: [Customer Service](#) In Project: [Network Operations](#)

Select a Group-Level Security Specification

(By default, unsecured groups have Full Access to the specified project.)

Use this page to specify Group-Level security settings for the specified group and currently selected project. (Group-level security can be overridden for a specific user and group through User-Level security settings.)

It is usually easier to specify Group-Level security. By specifying security settings at the group level, security can be easily modified for multiple users. It is best to employ User-Level security settings to allow or prevent access to certain individuals who do not conform to the typical security access settings for your company.

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10. To specify project security for another group, click the *Specify Security For An Unlisted Group* link (Figure XVII-15). Clicking this link will display a list of all groups not already secured as shown in Figure XVII-17.

Figure XVII-17

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search HELP

Current Project
Network Operations

Select a Group to Secure under Project: **Network Operations**

[Back To Secured Group List For Network Operations](#)

	Group	Active		
Select	Accounts Payable	true	view group members	view group contacts
Select	Accounts Receivable	true	view group members	view group contacts
Select	Sales	true	view group members	view group contacts
Select	Product Development	true	view group members	view group contacts
	Total:	4 Unsecured group(s)		

Select a group for which Group-Level security should be added under project Network Operations.

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11. From this page, click the *Select* link in the row corresponding to the appropriate group to which you want to apply project security.
12. Select the appropriate security setting from the listbox, as shown in figure XVII-18, and click the *Add* button.

Figure XVII-18

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search HELP

Current Project
Network Operations

Add Group-Level Security Specification For: **Accounts Payable** In Project: **Network Operations**

Select a Group-Level Security Specification

Read Only Access
Refuse All Access

(By default, unsecured groups have Full Access to the specified project.)

Add Cancel Reset

Use this page to specify Group-Level security settings for Network Operations. (Please be aware that User-Level security settings override Group-Level security settings for Network Operations.)

It is usually easier to specify Group-Level security. By specifying security settings at the Group Level, security can be easily modified for multiple users simultaneously. It is best to employ User-Level security to allow or prevent project access to certain individuals who do not conform to typical security settings for your company.

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13. Go back to step 6 and continue applying project security settings until you are complete.

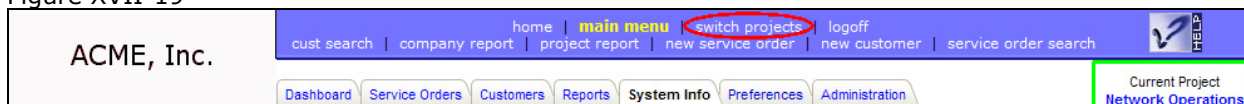
E. Configuration Overview – User-Level Project Security

PLEASE NOTE: It is usually easier to configure security at the group level than at the user level. By configuring settings at the group level, security can be easily administered for many users simultaneously. It is best to employ user-Level security to allow or prevent project access to certain individuals who do not conform to typical security access settings within your company.

Use the steps below to apply project security settings to an individual user.

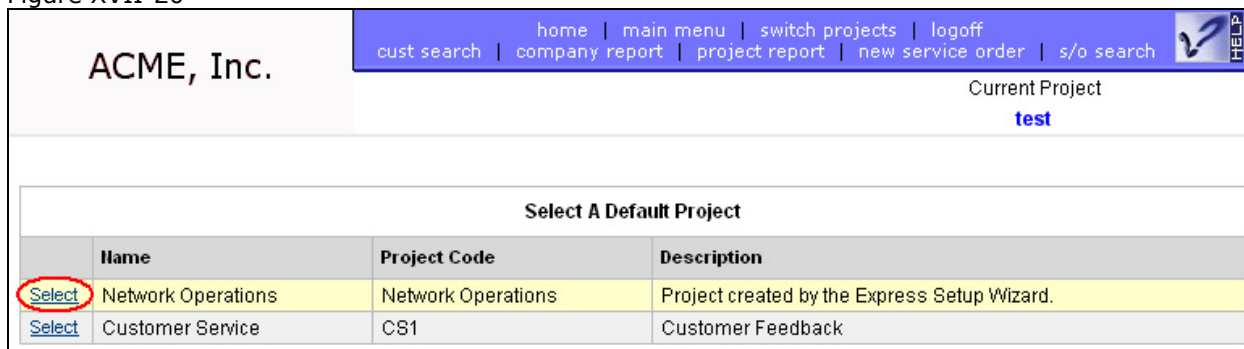
1. Login to your account as a company/account administrator.
2. Click the *switch projects* link at the top of your browser as shown in Figure XVII-19.

Figure XVII-19



3. Select the project from the switch projects page for which to apply user-level security settings as shown in Figure XVII-20.

Figure XVII-20



4. Select the *administration* tab.
5. Select the *Project Security – User-Level* link from the *Project Administration* box on the left-hand side of the page as shown in figure XVII-21.

Figure XVII-21

The screenshot displays the ACME, Inc. web application interface. At the top, there is a navigation bar with links for home, main menu, switch projects, logoff, cust search, company report, project report, new service order, new customer, and service order search. Below this is a secondary navigation bar with tabs for Dashboard, Service Orders, Customers, Reports, System Info, Preferences, and Administration (which is circled in red). The current project is identified as Network Operations. The main content area is titled "Main Menu - Administration" and is divided into two columns: Project Administration and Company Administration. Under Project Administration, there is a sub-section for Network Operations with a list of links, including "Project Security - User-Level" which is circled in red. Under Company Administration, there is a list of links including Self-Service Portal Information, Work With Groups, Work With Projects, Work With Users, Work With Project Administrators For: Network Operations, Work With Company/Account Administrators, Rename Service Order Template Attribute Labels, Work With Service Order Template Attribute Listbox Entries, Customer Security - Group-Level, Customer Security - User-Level, and Configuration Wizard. At the bottom of the page, there is a copyright notice: ©2002-2007 LegendSoft, Inc. All rights reserved.

6. The next page, Figure XVII-22, displays all users currently configured with some level of security for the current project. Listed in each row is the user's specific security setting.
7. To remove the user from the list, click the *Delete* link in the row corresponding to the appropriate user. Removing a user from the list is equivalent to removing the user's security restriction for access to the project data.
8. To modify the security setting for the user, click the *Edit* link.

Figure XVII-22

ACME, Inc.

home | main menu | switch projects | logoff
 cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Current User-Level Security Settings for Project: **Network Operations**

Specify Security For An Unlisted User

Username	Current Security Specification		
GenericCustomer	Refuse All Access	Edit	Delete
adamsc	Read Only Access	Edit	Delete
Total:	2 Secured user(s)		

Usage Tips

- Use this page to specify User-Level security settings for Network Operations. User-Level security settings override settings at the Group-Level.
- SPoTS[®] applies security by first checking settings at the Group-Level and then at the User-Level. If a user belongs to multiple secured groups, the most restrictive access of all those groups will be applied to the user. If User-Level security is specified for an individual, the User-Level setting unequivocally overrides any corresponding Group-Level setting.
- **Unless secured at the Group or User Level, users will by default have Full Access to Network Operations. In other words, if a user does not belong to a secured group or they do not belong to any group at all, and User-Level security is unspecified, the user will have Full Access to Network Operations.**
- **PLEASE NOTE:** It is usually easier to configure security at the Group-Level than at the User-Level. By configuring settings at the Group Level, security can be easily administered for many users simultaneously. It is best to employ User-Level security to allow or prevent project access to certain individuals who do not conform to typical security access settings within your company.

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9. Figure XVII-23 displays the page that allows you to change the user's security setting. Choose the appropriate entry from the listbox and click the *Update* button.

Figure XVII-23

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Edit User-Level Security Specification For: GenericCustomer In Project: Network Operations

Select a User-Level Security Specification

Full Access
Read Only Access
Refuse All Access

(User-Level project security overrides all Group-Level project security for the specified user.)

Update Reset

Use this page to specify User-Level security settings for the specified user and currently selected project. User-Level security settings override any existing Group-Level security settings for this project.

It is usually easier to specify Group-Level security. By specifying security settings at the group level, security can be easily modified for multiple users. It is best to employ User-Level security settings to allow or prevent access to certain individuals who do not conform to the typical security access settings for your company.

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- To specify customer security for another user, click the *Specify Security For An Unlisted User* link (Figure XVII-22). Clicking this link will display a list of all users not already secured as shown in Figure XVII-24.

Figure XVII-24

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Select a User to Secure under Project: Network Operations

[Back To Secured User List For Network Operations](#)

	Username	First Name	M.I.	Last Name	Phone Number
Select	admin-57	James		Fischer	
Select	bankerr	Richard		Banker	770-555-1212
Select	kjacobson	Kelly		Jacobson	888-220-5810
Select	washk	Kevin		Wash	678-555-1212
	Total:	4 User(s)			

Select an individual for whom User-Level security should be added under project Network Operations.

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- From this page, click the *Select* link in the row corresponding to the appropriate user to whom you want to apply project security.
- Select the appropriate security setting from the listbox, as shown in figure XVII-25, and click the *Add* button.

Note that a user by default has full access to a project. However, that same user may belong to one or more groups whose security settings prevent access to a project.

SPoTS enables you to override security settings at the group level by applying settings at the user level. To enable this override, you will notice that the listbox contains a *Full Access*

entry. Select the *Full Access* listbox entry to override any corresponding group-level project security settings and enable the user to access the project.

Figure XVII-25

ACME, Inc. home | main menu | switch projects | logoff
 cust search | company report | project report | new service order | s/o search HELP

Current Project
Network Operations

Add User-Level Security Specification For: **admin-57** In Project: **Network Operations**

Select a User-Level Security Specification

Full Access
 Read Only Access
 Refuse All Access

(User-Level project security overrides all Group-Level project security for the specified user.)

Add Cancel Reset

Use this page to specify User-Level security settings for Network Operations. User-Level security settings override Group-Level security settings for Network Operations.

It is usually easier to specify Group-Level security. By specifying security settings at the Group Level, security can be easily modified for multiple users simultaneously. It is best to employ User-Level security to allow or prevent project access to certain individuals who do not conform to typical security settings for your company.

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13. Go back to step 6 and continue applying project security settings until you are complete.

XVIII. How to Set Default Service Order Attribute Listbox Entries

A. Overview, Intended Audience, and Prerequisites

This section describes how to specify which listbox entries are pre-selected by the system when creating a new service order / ticket. It is intended for account administrators. In order to specify default service order attribute listbox entries you must have first registered for an account and created at least one project. You should review the following sections prior to proceeding with this section:

1. *Application Architecture*
2. *How to Create a New Project.*

And in the *What Is* section:

3. The *What is a Service Order* sub-section.
4. The *What is a Project* sub-section.
5. The *What is a Service Order Attribute* sub-section.

In SPoTS service order fields are referred to as *service order attributes*. Names of these attributes are referred to as *attribute labels*. Many service order attributes have a drop-down listbox associated with them. These listboxes contain *service order attribute listbox entries*.

SPoTS allows you to choose which listbox entries are pre-selected when new service orders are created. Specifying these default values reduces the amount of input required by a user when creating a new service order / ticket, thereby improving the system's ease of use.

Default attribute listbox entries are configured on a project-by-project basis. That is, you can choose which listbox entries will be pre-selected for each of the projects in your account.

B. Configuration Overview

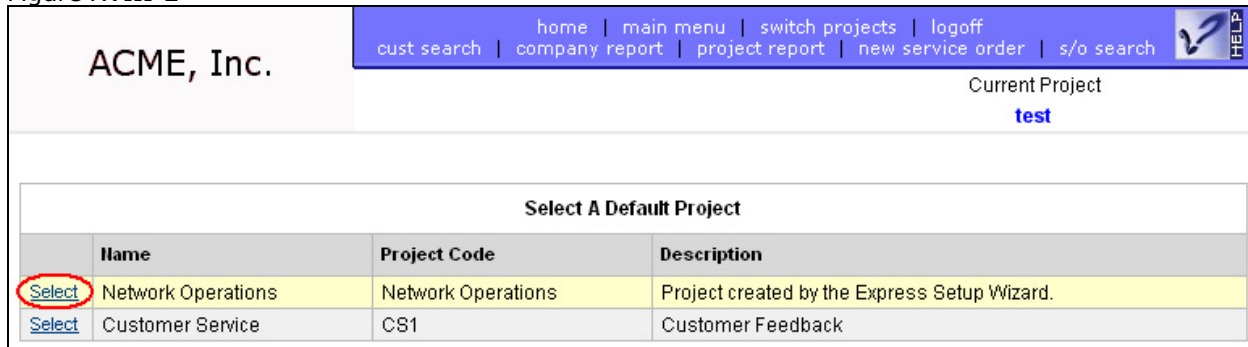
1. Login to your account as an administrator.
2. Click the *switch projects* link at the top of your browser as shown in Figure XVIII-1.

Figure XVIII-1



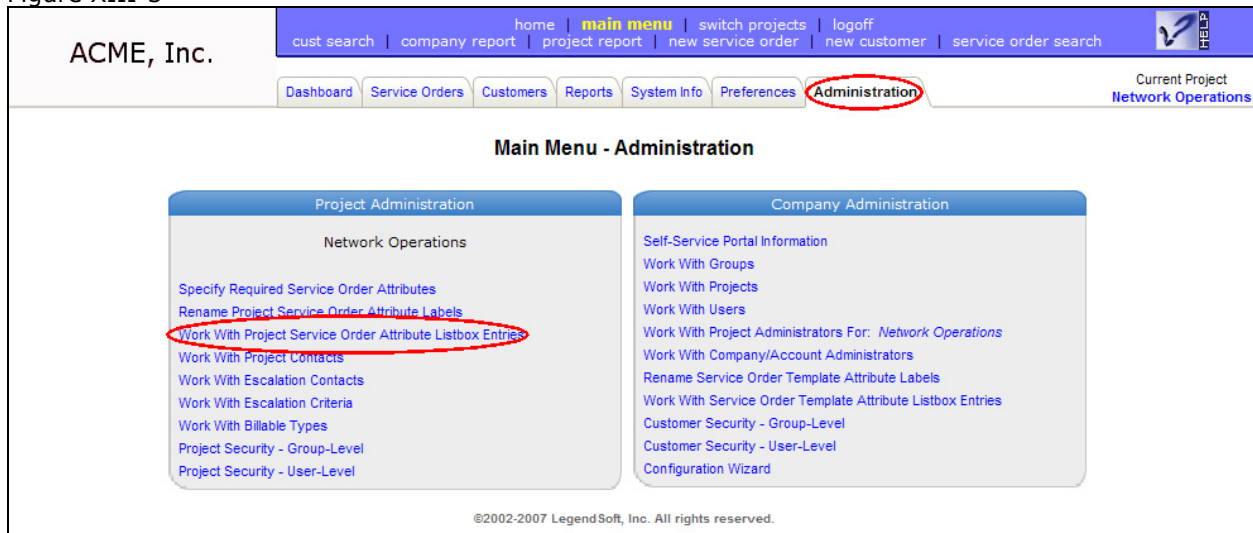
3. Select the project from the switch projects page for which you want to specify default service order attribute entries as shown in Figure XVIII-2.

Figure XVIII-2



4. Select the *administration* tab.
5. Select the *Work With Project Service Order Attribute Listbox Entries* link from the *Project Administration* box on the left-hand side of the page as shown in figure XVIII-3.

Figure XIII-3



6. On the next page (Figure XVIII-4) you can choose the default entry for each listbox circled in red.

Note that the attribute fields marked with an asterisk are fields visible to Self-Service Portal users. If you anticipate using the currently selected project with the Self-Service Portal, special care should be taken when specifying the default value of these listboxes. For more information regarding the Self-Service Portal, please refer to the sections entitled *What is the Self-Service Portal* and *How to Create a Self-Service Portal User*.

Figure XIII-4

ACME, Inc. home | main menu | switch projects | logoff
 cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Usage Tips

Use this page to edit Attribute Listbox Entries and to select the default entry in each Attribute Listbox when creating new Service Orders. Click on the blue Attribute Labels below to modify the listbox entries for: **Network Operations**. You may also select one entry in each Attribute Listbox and click the "Set Defaults" button to use that selection as the default for new Service Orders. Selecting a default "Group" or "Individual" affects all projects across your company; therefore, only company administrators have the authority to select a default entry for these two Attribute Listboxes. (The "Reported Version" and "Resolved Version" listboxes must contain the same entries.)

* - Field visible on the Self-Service Portal.

Report Service Order To

* Group: Individual:

Group Individual

* Contact Information

Date Resolved:

* Urgency: 3 - Tomorrow

Reported By: admin-57

Category: N/A

Product/System: N/A

Phase: N/A

Unresolved Resolved

Date Opened:

* Severity: N/A

* Status: New

Type: N/A

Reported Version: N/A

Resolved Version: N/A

* Summary (limited to 255 characters)

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7. Choose one entry from each of the drop-down listboxes that should be pre-selected by the system when a user is creating a new service order. Then click the *Set Defaults* button.

Please note that specifying a default entry for either of the *Group* or *Individual* listboxes affects all projects in your account. Therefore, only company administrators have the authority to select a default entry for these two attribute listboxes.

XIX. How to Import Customers

A. *Overview, Intended Audience, and Prerequisites*

This section describes how to import customer data into your account. It is intended for all users. You should have first registered for an account, logged into the account, and created one project before proceeding with this section. You should also review the following sections before continuing:

1. *Application Architecture*
2. *How to Create a Customer.*

And in the *What Is* section:

3. The *What is a Customer* sub-section.

SPoTS allows you to import existing customer data into your account. In summary, importing customers is accomplished by the following four steps:

1. Entering or exporting your external customer data into a special Microsoft Excel spreadsheet.
2. Uploading the spreadsheet to your SPoTS account.
3. Reviewing that the data was properly uploaded.
4. Confirming that you wish to import the data and create new customers in your account.

When importing customer data, please note the following:

1. The customer data must be imported using the Excel spreadsheet provided to you and available for download after logging in to your account.
2. Each imported spreadsheet can contain a maximum of 500 customers or rows.
3. Certain fields in the spreadsheet template are required.
4. Certain fields in the spreadsheet are limited to specific values (e.g. state abbreviations, country abbreviations, etc.).
5. All fields have a maximum length.

Specific customer fields contained in the template are defined in Figure XIX-1. These field specifications and their associated values are also available for download in *CustomerFieldDefinitions.xls*.

Figure XIX-1

Customer Field Definitions			
Field Name	Field Length	Special Notes	Required Field
Customer Name	128	Append your customer number to the name. For example, if the customer name is "Acme Inc." and your customer number is 54321, specify "Acme Inc. - 54321" as the customer name. SPoTS allows you to retrieve a customer by entering a portion of their name. Therefore, including both the name and customer number in this field will allow your users to open a customer by entering either their name or customer number. This also alleviates the necessity of synchronizing SPoTS customer numbers with customer numbers from an external system.	yes
Bill Attention	64		
Bill Address 1	80		
Bill Address 2	80		
Bill City	64		
Bill State	2	Use a two digit state or province code. See State and Province Codes below.	
Bill Zip	20		
Bill Country	2	Use a two digit country code. See Country Codes below.	
Ship Attention	64		
Ship Address 1	80		
Ship Address 2	80		
Ship City	64		
Ship State	2	Use a two digit state or province code. See State and Province Codes below.	
Ship Zip	20		
Ship Country	2	Use a two digit country code. See Country Codes below.	
Phone Number	20		
Fax Number	20		
Web Site	255	The web site, if provided, should be preceded by "http://". (i.e. http://www.troubleticketsoftware.com rather than www.troubleticketsoftware.com .)	
Description	1024		
Active	1	Specify 'T' if the customer is active or 'F' if the customer is inactive.	yes

Follow the instructions below to import customer data into your account.

1. Login to your account.
2. Select the *Cust./Orders* tab as shown in figure XIX-2.
3. Click the *Import Customers* link as shown in figure XIX-2.

Figure XIX-2

ACME, Inc. home | [main menu](#) | switch projects | logoff
cust search | company report | project report | new service order | new customer | service order search

Dashboard Service Orders **Customers** Reports System info Preferences Administration

Current Project
Network Operations

Customer Actions
[Create A New Customer](#)
[Import Customers](#)

View Existing Customer by Name:
[Text Input]
or by Customer ID:
[Text Input]
Submit

Search for a Customer
Customer Name:
 Starts With Contains
[Text Input]
Sort the search results by:
Name - Ascending
Search

(click on any row in the list below to display the Customer detail)

	Number ↑ ↓	Customer Name ↑ ↓	Phone ↑ ↓	Fax ↑ ↓	Billing City ↑ ↓
edit	13	Ford			
edit	12	Chubb			
edit	11	United Technologies			
edit	10	Rand			
edit	9	Amgen			
edit	8	Johnson Controls			
edit	7	Allianze			
edit	6	Verizon			
edit	5	AT&T			
edit	4	Costco			
edit	3	IBM			
edit	2	J & J			
Total:		13 customer(s)			

[2 pages 1 2 |>]

refresh Change The Report Displayed Here

Customer 13 Detail

Billing Address	Shipping Address
Attention:	Attention:
Address 1:	Address 1:
Address 2:	Address 2:
City:	City:
State / Province:	State / Province:
Zip Code:	Zip Code:
Country:	Country:

- Download the *CustomerImportTemplate.xls* spreadsheet to your PC by clicking the *CustomerImportTemplate.xls* link as shown in Figure XIX-3.

Figure XIX-3

ACME, Inc. home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Upload Your Customer Import Spreadsheet

Usage Tips

If you wish to import a large number of customers, you can do so by uploading them in an Excel spreadsheet. The spreadsheet you upload must conform to the [Customer Import Spreadsheet Template](#). To download the template, click here: [CustomerImportTemplate.xls](#). For a definition of the fields in a customer record, click here: [CustomerFieldDefinitions.xls](#). Customer import spreadsheets must not contain more than 500 rows/customers.

Excel Spreadsheet: [Text Input] Browse...

Upload Reset

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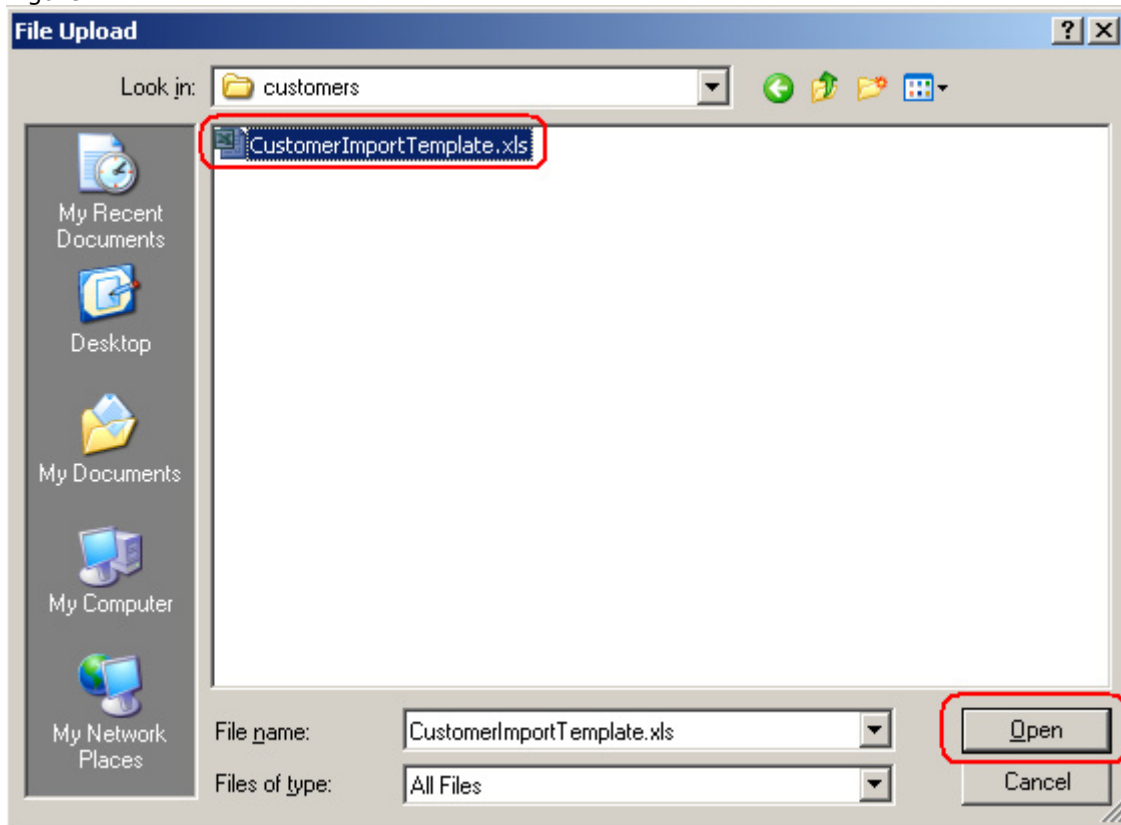
- Export, cut-and-paste, or otherwise enter customer data into the spreadsheet as specified in the column headings of the template spreadsheet and according to the field specifications in Figure XIX-1.

Note that the template spreadsheet contains one row of sample data for use as an example.

- Save the spreadsheet containing the customer data to the hard-drive on your PC.
- Click the *Browse...* button.
- Navigate to the location on your hard-drive where you saved the template spreadsheet containing customer data in step 6.

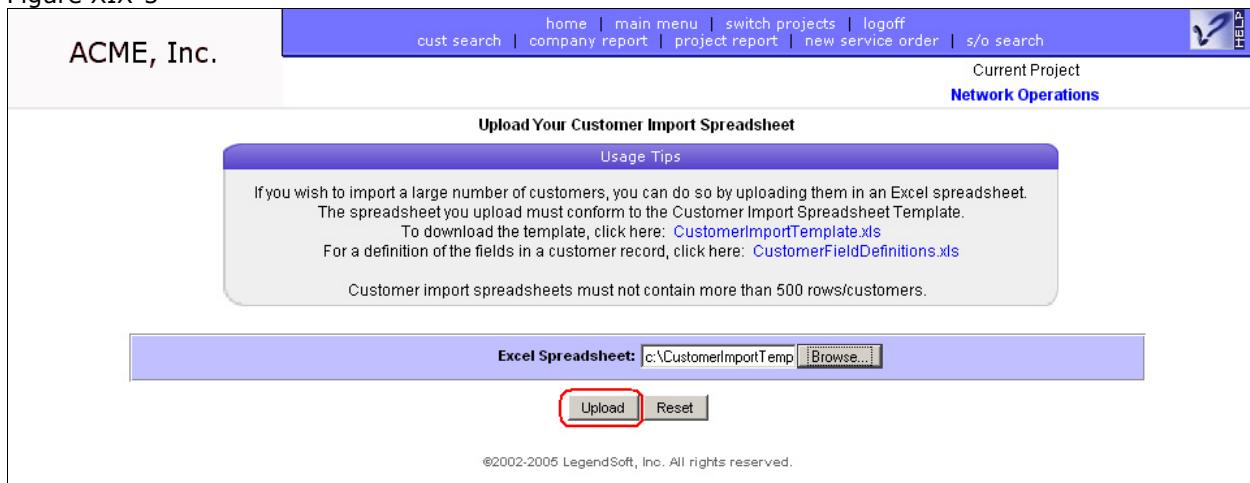
9. Highlight the saved file by clicking on the file once. Click the *Open* button as shown in Figure XIX-4.

Figure XIX-4



10. Click the *Upload* button as shown in Figure XIX-5. This will cause the file containing your customer data to be uploaded to your account for verification.

Figure XIX-5



11. After uploading the data, the customer information contained in the spreadsheet will be displayed for verification purposes. Verify that the data has been properly imported and click the *Verify* button as shown in Figure XIX-6.

Figure XIX-6

ACME, Inc. home | main menu | switch projects | logoff
 cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Customer Import Verification

Usage Tips
 If you wish to import the customers shown below into your SPoTS® account, click the *Verify* button at the bottom of the page, otherwise click *Cancel*.
 (Please click only once as the customer import may take several minutes.)

Customer Name	Billing Address	Billing Attention	Billing State	Billing Country	Phone Number	Active
	Shipping Address	Shipping Attention	Shipping State	Shipping Country	Fax Number	Account Owner
Web Site Description						
Sample Customer - 1000	1 Main Street Suite 455	John Doe Atlanta	GA 30342	US	404-123-4567 404-123-8901	true
	1 Main Street Shipping Dock 1	Shipping Dept. Atlanta	GA 30342	US		admin-57
http://www.acme.com						
This is a short description of the customer and contain miscellaneous information helpful to CSRs.						
Total:	1 total customer(s)					

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12. The status of each customer import will be displayed in the *Customer Import Results* page as shown in figure XIX-7.

Figure XIX-7

ACME, Inc. home | main menu | switch projects | logoff
 cust search | company report | project report | new service order | s/o search

Current Project
Network Operations

Customer Import Results

Usage Tips
 The results of your customer import are shown below.
 (The full results may take a minute or two to be displayed.)

Customer Number	Billing Address	Billing Attention	Billing State	Billing Country	Phone Number	Active
Customer Name	Shipping Address	Shipping Attention	Shipping State	Shipping Country	Fax Number	
Web Site Description						
1	1 Main Street Suite 455	John Doe Atlanta	GA 30342	US	404-123-4567 404-123-8901	true
Sample Customer - 1000	1 Main Street Shipping Dock 1	Shipping Dept. Atlanta	GA 30342	US		
http://www.acme.com						
This is a short description of the customer and contain miscellaneous information helpful to CSRs.						
Total:	total customer(s)					

Customer successfully created.

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You may now begin accessing, updating, and creating service orders / trouble tickets for your imported customers.

XX. How to Export Customer Data

A. Overview, Intended Audience, and Prerequisites

This section describes how to export customer data from your account. It is intended for all users. You should have first registered for an account, logged into the account, and created at least one customer before proceeding with this section. You should also review the following sections before continuing:

1. *Application Architecture*
2. *How to Create a Customer.*

And in the *What Is* section:

3. The *What is a Customer* sub-section.

From time-to-time you might find it useful to export the customer data within your account for archival purposes or so that it can be imported or used by another system or application. SPoTS allows you to export and store this customer data through the *Customer Report* page.

Customer data can be downloaded to your computer in a format called XML. XML is an acronym for extensible markup language. XML can be read and/or manipulated by many different programs. This format was chosen for exported customer data because of its inherent flexibility. If you are familiar with XML, you may access the DTD (document type definition) for customer data here: <http://www.e-spot.biz/spot/customer.dtd>.

Follow the instructions below to export the customer data in your account.

1. Login to your account.
2. Select the *Reports* tab as shown in figure XX-1.
3. Click the *Customer Report* link in the *Company Reports* box as shown in figure XX-1.

Figure XX-1

The screenshot shows the SPoTS web application interface for ACME, Inc. The navigation menu at the top includes 'Dashboard', 'Service Orders', 'Customers', 'Reports' (highlighted), 'System Info', 'Preferences', and 'Administration'. The 'Main Menu - Reports' section is displayed, featuring a table of 'Report Builder Reports' and two boxes for 'Other Network Operations Project Reports' and 'Other Company Reports'. The 'Filtered Customer Report' link in the 'Other Company Reports' box is circled in red. Below the reports section is a 'Usage Tips' box.

Report Builder Reports					
			Project	Report Owner	Public/Private
run	edit	delete	Customers - All	admin-57	Public
run	edit	delete	Customers - Owned By admin-57	admin-57	Private
run	edit	delete	Service Orders - All - All Projects	admin-57	Public
run	edit	delete	Service Orders - All - Customer Service	admin-57	Public
run	edit	delete	Service Orders - All - Network Operations	admin-57	Public
run	edit	delete	Service Orders - All - Reported By admin-57	admin-57	Private
run	edit	delete	Service Orders - All - Reported To admin-57	admin-57	Private
run	edit	delete	Service Orders - All - test	admin-57	Public
run	edit	delete	Service Orders - Resolved - All Projects	admin-57	Public
run	edit	delete	Service Orders - Resolved - Customer Service	admin-57	Public

Other 'Network Operations' Project Reports

- Performance/Statistical Reports
- Filtered Billing Reports
- Filtered Service Order Report (Old Project Report)

Other Company Reports

- Performance/Statistical Reports
- Filtered Billing Reports
- Filtered Customer Report**
- Filtered Service Order Report (Old Company Report)

Usage Tips

SPoTS® provides you with the capability to design and save your own reports.

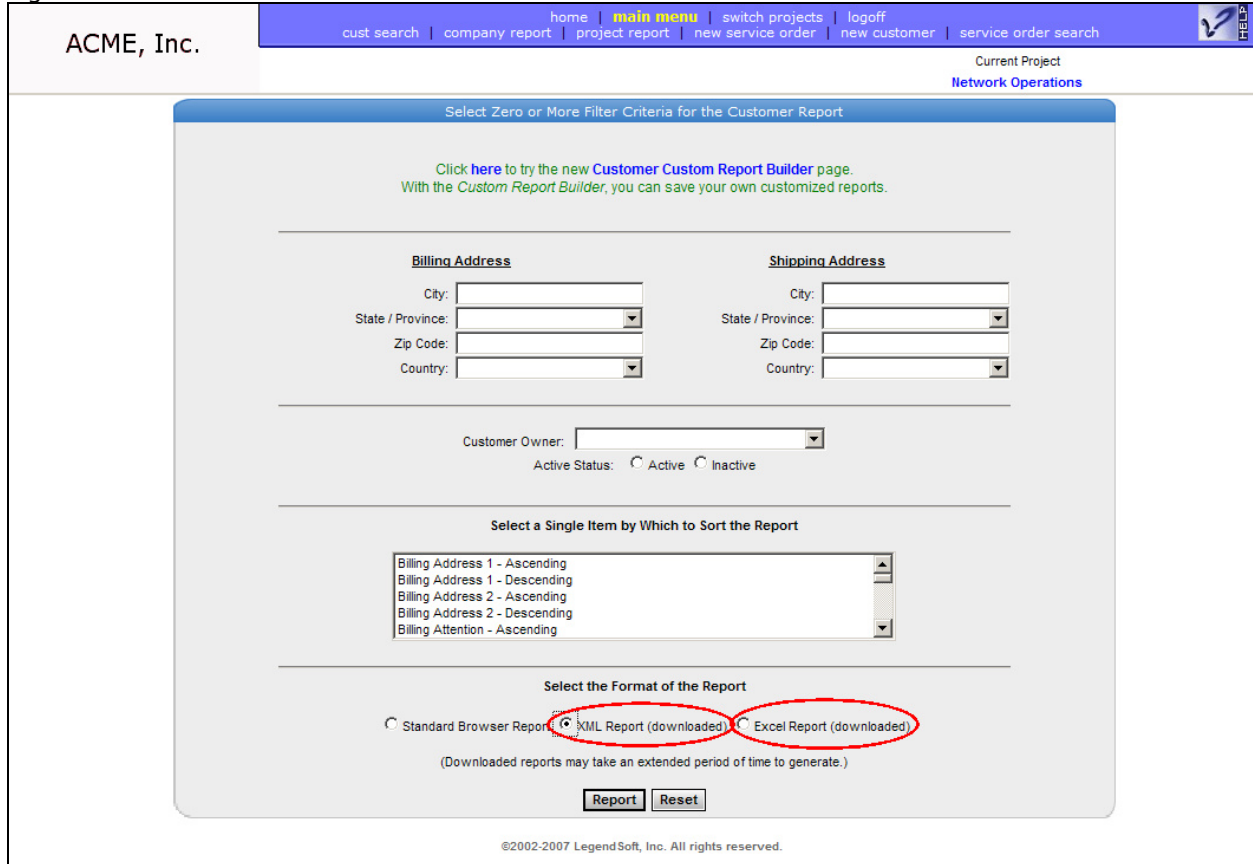
- Service Order reports specific to your currently selected project can be created and saved by clicking on the *project report builder* link inside the 'Report Builder Reports' listbox.
- Cross-project Service Order reports can be created and saved by clicking on the *company report builder* link.
- Customer reports can be created and saved by clicking on the *customer report builder* link.
- To view only reports that you have created and saved, check the *My Reports Only* checkbox. To view only reports pertinent to your currently selected project, check the *Current Project Only* checkbox.

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Refer to Figure XX-2 in the following 3 steps.

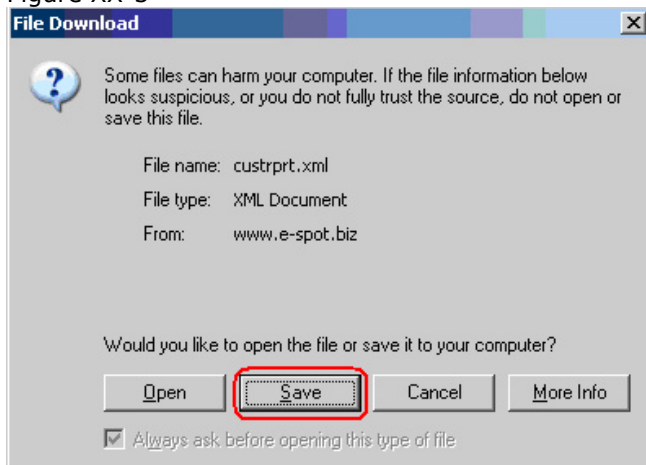
4. On the following page select any criteria by which you would like to filter the customer data. (If you would like to export all of the customer data, do not select any filter criteria.)
5. Click either the *XML Report* or *Excel Report* radio buttons.
6. Select the appropriate sort ordering for the report and click the *Report* button.

Figure XX-2



7. You should then be prompted for the location on your PC where the file should be stored. Click the *Save* button as shown in figure XX-3, navigate to the appropriate directory, and again click the *Save* button. The report may take several minutes to download depending upon the number of customers in your account and the speed of your Internet connection.

Figure XX-3



XXI. How to Export Service Order Data

A. Overview, Intended Audience, and Prerequisites

This section describes how to export service order data from your account. It is intended for all users. You should have first registered for an account, logged into the account, and created at least one service order before proceeding with this section. While not required, you might find it useful to review the *Application Architecture* section before proceeding with this section.

From time-to-time you might find it useful to export service order data within your account for reasons such as:

- Detailed statistical analysis
- Importing data into 3rd-party applications
- Sending reports to individuals without access to your account
- Archival purposes

SPoTS allows you to export service order data contained in your account into Microsoft Excel or into XML (extensible markup language) format.

Follow the steps below to export service order data from your account.

1. Login to your account.
2. Select the *Reports* tab as shown in figure XXI-1.
3. Select the appropriate *Filtered Service Order Report* link from the *Other Company Reports* or *Other Project Reports* box as shown in figure XXI-1. Choosing the link from the *Other Company Reports* box will allow you to export data for all projects within your account.

Figure XXI-1

ACME, Inc. home | **main menu** | switch projects | logoff
cust search | company report | project report | new service order | new customer | service order search

Dashboard | Service Orders | Customers | **Reports** | System Info | Preferences | Administration Current Project
Network Operations

Main Menu - Reports

Report Builder Reports

project report builder | company report builder | customer report builder My Reports Only Current Project Only

			Saved Report Name	Project	Report Owner	Public/Private
run	edit	delete	Customers - All		admin-57	Public
run	edit	delete	Customers - Owned By admin-57		admin-57	Private
run	edit	delete	Service Orders - All - All Projects		admin-57	Public
run	edit	delete	Service Orders - All - Customer Service	Customer Service	admin-57	Public
run	edit	delete	Service Orders - All - Network Operations	Network Operations	admin-57	Public
run	edit	delete	Service Orders - All - Reported By admin-57		admin-57	Private
run	edit	delete	Service Orders - All - Reported To admin-57		admin-57	Private
run	edit	delete	Service Orders - All - test	test	admin-57	Public
run	edit	delete	Service Orders - Resolved - All Projects		admin-57	Public
run	edit	delete	Service Orders - Resolved - Customer Service	Customer Service	admin-57	Public

Other 'Network Operations' Project Reports

Performance/Statistical Reports

Filtered Billing Reports

Filtered Service Order Report (Old Project Report)

Other Company Reports

Performance/Statistical Reports

Filtered Billing Reports

Filtered Customer Report

Filtered Service Order Report (Old Company Report)

Usage Tips

SPoTS® provides you with the capability to design and save your own reports.

- Service Order reports specific to your currently selected project can be created and saved by clicking on the *project report builder* link inside the 'Report Builder Reports' listbox.
- Cross-project Service Order reports can be created and saved by clicking on the *company report builder* link.
- Customer reports can be created and saved by clicking on the *customer report builder* link.
- To view only reports that you have created and saved, check the *My Reports Only* checkbox. To view only reports pertinent to your currently selected project, check the *Current Project Only* checkbox.

4. Select the criteria by which the service orders should be filtered from the project report criteria page or the company report criteria page, as appropriate (Figures XXI-2 and XXI-3).
5. Select the appropriate sort ordering for the report and click the *Report* button.

Figure XXI-2



ACME, Inc. Current Project
Network Operations

Select Zero or More Filter Criteria for the Project Report

Click [here](#) to try the new **Project-Level Custom Report Builder** page.
With the *Custom Report Builder*, you can save your own customized reports.

Reported To Group: Reported to Individual:

Urgency: Phase:

Reported By: Severity:

Category: Status:

Product/System: Type:

Author: Reported Version:

Date Opened (yyyy-mm-dd): Resolved Version:

Date Resolved (yyyy-mm-dd): Customer:

Unresolved Resolved Due Date (yyyy-mm-dd):

Select a Single Item by Which to Sort the Report

Date Opened - Descending
Date Resolved - Ascending
Date Resolved - Descending
Date Date - Ascending
Date Date - Descending
Contact Information - Ascending
Contact Information - Descending

Select the Format of the Report

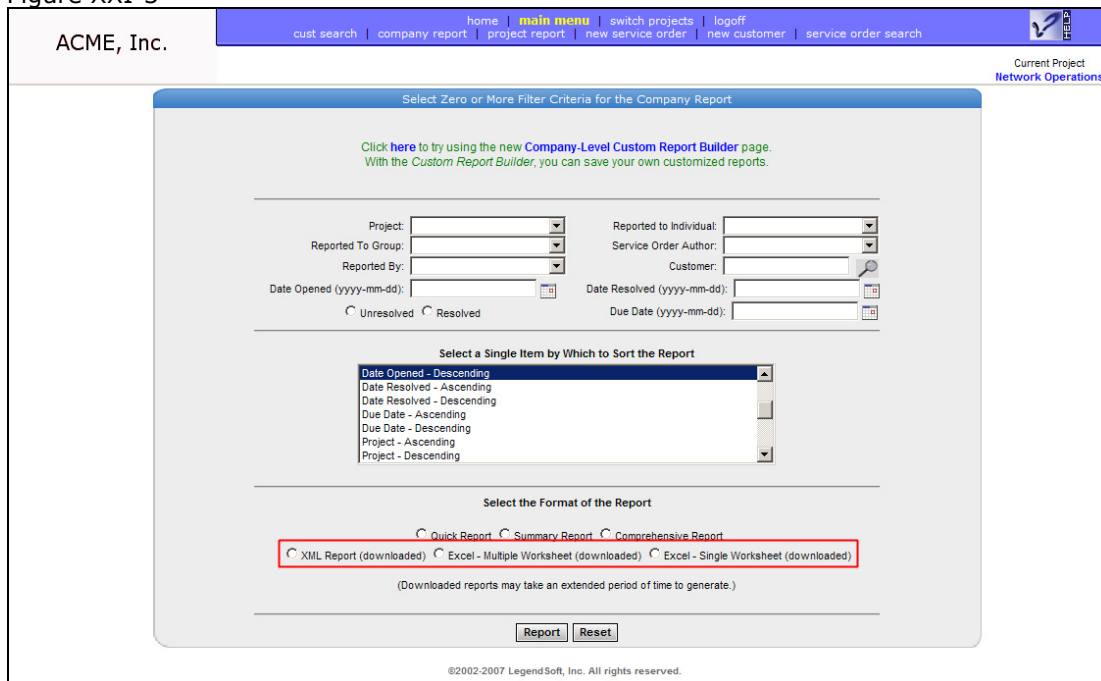
Quick Report Summary Report Comprehensive Report

XML Report (downloaded) Excel - Multiple Worksheet (downloaded) Excel - Single Worksheet (downloaded)

(Downloaded reports may take an extended period of time to generate.)

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Figure XXI-3



ACME, Inc. Current Project
Network Operations

Select Zero or More Filter Criteria for the Company Report

Click [here](#) to try using the new **Company-Level Custom Report Builder** page.
With the *Custom Report Builder*, you can save your own customized reports.

Project: Reported to Individual:

Reported To Group: Service Order Author:

Reported By: Customer:

Date Opened (yyyy-mm-dd): Date Resolved (yyyy-mm-dd):

Unresolved Resolved Due Date (yyyy-mm-dd):

Select a Single Item by Which to Sort the Report

Date Opened - Descending
Date Resolved - Ascending
Date Resolved - Descending
Due Date - Ascending
Due Date - Descending
Project - Ascending
Project - Descending

Select the Format of the Report

Quick Report Summary Report Comprehensive Report

XML Report (downloaded) Excel - Multiple Worksheet (downloaded) Excel - Single Worksheet (downloaded)

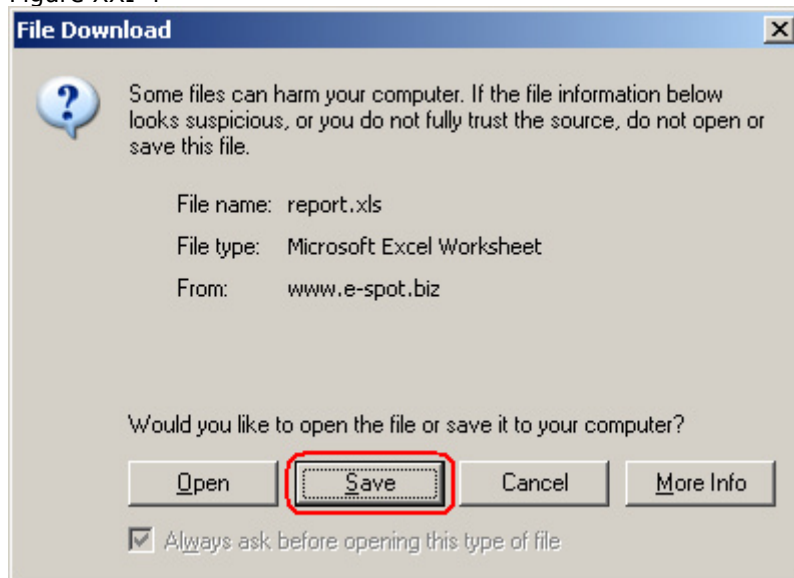
(Downloaded reports may take an extended period of time to generate.)

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6. If you wish to export the data into an Excel spreadsheet, select the *Excel Report* radio button. If you wish to export data into an XML file, select the *XML Report* radio button.

7. You should then be prompted for the location on your PC where the XML or Excel file should be stored. Click the *Save* button as shown in figure XXI-4, navigate to the appropriate directory, and again click the *Save* button. The report may take several minutes to download depending upon the number of service orders in your account and the speed of your Internet connection.

Figure XXI-4



XXII. How to Customize Your Account Logo

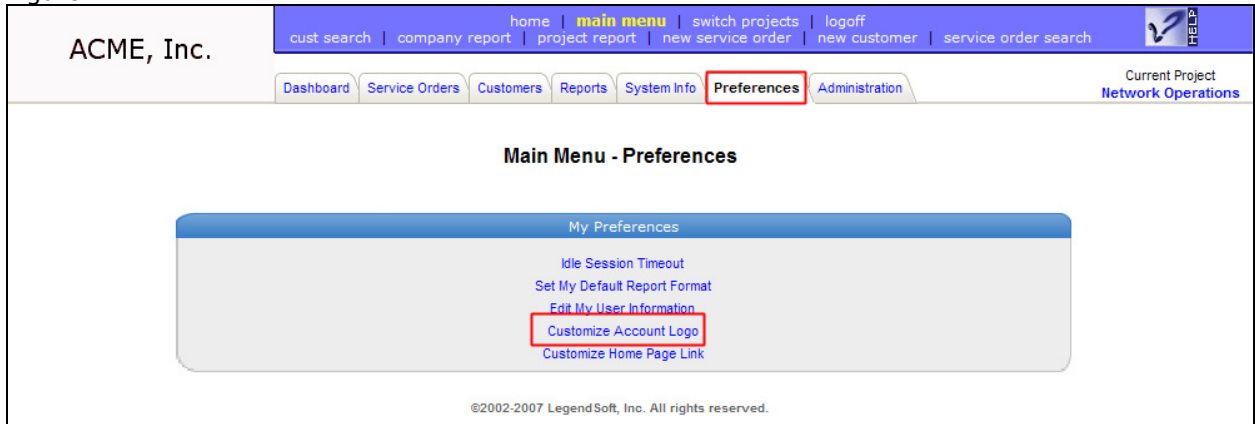
A. *Overview, Intended Audience, and Prerequisites*

This section describes how to customize the logo that is displayed in the upper left-hand corner of the page when a user logs in to your account. It is intended for account administrators. Prior to customizing your account logo, you will need to make your logo available on an Internet web server. Preferably, the web server where the logo resides should have the capability of serving HTTPS (SSL) requests. Additionally, you should have registered for an account and logged into the account as a company administrator.

You may find it useful to customize SPoTS to display your own company's logo. In fact, this may be crucial if you will be allowing customers to login to your account or to use the Self-Service Portal. Follow the steps below to display your logo to anyone accessing your account.

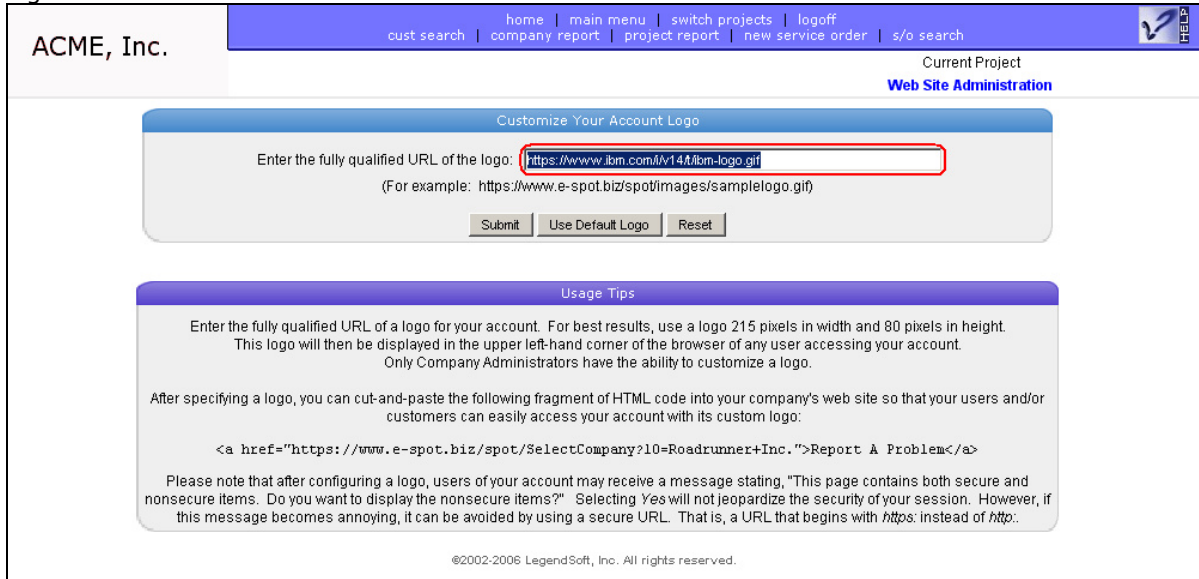
1. Login to your account as a company administrator.
2. Select the *Preferences* tab as shown in figure XXII-1.
3. Select the *Customize Account Logo* link from the *My Preferences* box as shown in figure XXII-1.

Figure XXII-1



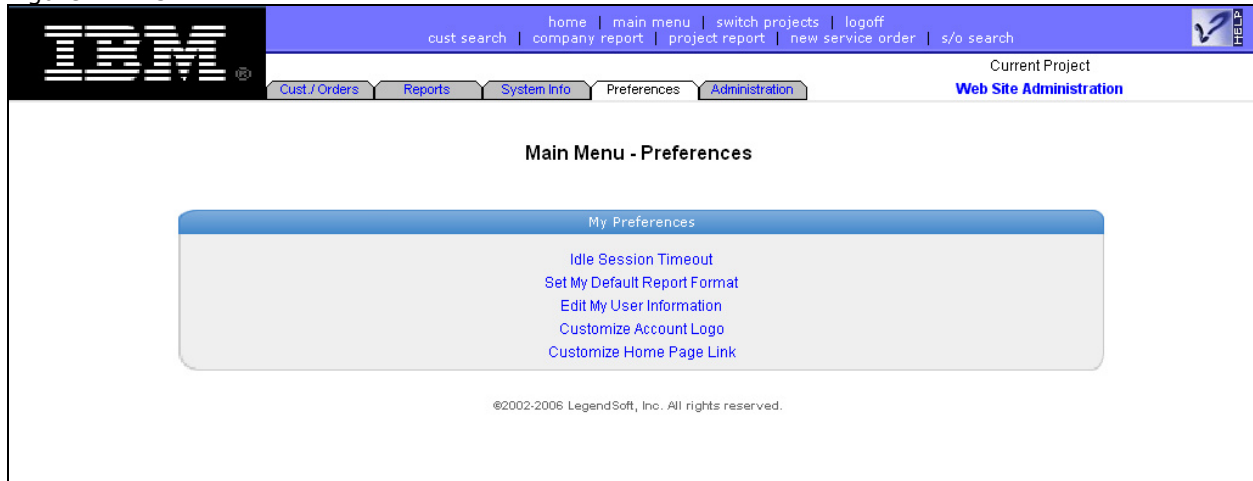
4. Enter the URL of your logo into the edit field as shown in Figure XXII-2. Be certain to use a secure URL (i.e. a URL that begins with the letters "https"). This will prevent browser messages from being displayed to end-users warning them that portions of the page are unsecured.

Figure XXII-2



5. Click the *Submit* button. If you have entered the URL properly, your logo will be immediately displayed in the upper left-hand corner of your browser as shown in Figure XXII-3.

Figure XXII-3



XXIII. How to Configure a Billable Type

A. *Overview, Intended Audience, and Prerequisites*

This section describes how to create Billable Types for use when tracking costs or sales through the use of Billable Items. It is intended for account and project administrators. In order to create Billable Types you must have first registered for an account and created at least one project. You should review the following sections prior to proceeding with this section:

1. *Application Architecture*
2. *How to Create a New Project.*

And in the *What Is* section:

1. The *What is a Service Order* sub-section.
2. The *What is a Project* sub-section.
3. The *What are Billable Types and Billable Items* sub-section.

SPoTS allows you to track various types of costs associated with a trouble ticket or sales associated with a Service Order. These various types are referred to as Billable Types. The system enables you to create as many Billable Types as required by your business. These types can then be used for reporting and tracking purposes.

Billable Types are configured on a project-by-project basis. That is, each project has its own unique set of Billable Types.

B. *Configuration Overview*

1. Login to your account as an account or project administrator.
2. Click the *switch projects* link at the top of your browser as shown in Figure XXIII-1.

Figure XXIII-1



3. Select the project from the switch projects page for which you want to specify default service order attribute entries as shown in Figure XXIII-2.

Figure XXIII-2

The screenshot shows the ACME, Inc. web application. The top navigation bar includes links for home, main menu, switch projects, logoff, cust search, company report, project report, new service order, and s/o search. The current project is identified as 'test'. Below this is a table titled 'Select A Default Project' with the following data:

	Name	Project Code	Description
Select	Network Operations	Network Operations	Project created by the Express Setup Wizard.
Select	Customer Service	C81	Customer Feedback

4. Select the *administration* tab.
5. Select the *Work With Billable Types* link from the *Project Administration* box on the left-hand side of the page as shown in figure XXIII-3.

Figure XXIII-3

The screenshot shows the SPOTS web application. The top navigation bar includes links for home, main menu, switch projects, logoff, cust search, company report, project report, new service order, new customer, and service order search. The current project is identified as 'Shipping/Delivery Services'. The 'Administration' tab is selected. Below this is a section titled 'Main Menu - Administration' with two columns of links:

Project Administration	Company Administration
Shipping/Delivery Services	Self-Service Portal Information
Specify Required Service Order Attributes	Work With Groups
Rename Project Service Order Attribute Labels	Work With Projects
Work With Project Service Order Attribute Listbox Entries	Work With Users
Work With Project Contacts	Work With Project Administrators For: <i>Shipping/Delivery Services</i>
Work With Escalation Contacts	Work With Company/Account Administrators
Work With Escalation Criteria	Rename Service Order Template Attribute Labels
Work With Billable Types	Work With Service Order Template Attribute Listbox Entries
Project Security - Group-Level	Customer Security - Group-Level
Project Security - User-Level	Customer Security - User-Level
	Configuration Wizard

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6. All existing Billable Types for your currently selected project will be displayed as shown in figure XXIII-4.
7. To create a new Billable Type, select the *Create a New Billable Type* link.
8. To edit, delete, activate, or deactivate an existing Billable Type, respectively select the *edit*, *delete*, *activate*, or *deactivate* link in the row corresponding to the existing type as shown in figure XXIII-4.

(Note that you cannot delete a Billable Type if it is in use by one or more Billable Items. If this is the case, consider deactivating the type to prevent it from being used in the future.)

Figure XXIII-4

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home | main menu | switch projects | logoff
cust search | company report | project report | new service order | s/o search

Current Project
Shipping/Delivery Services

Administer Billable Types For Project: Shipping/Delivery Services
Changes may take up to 120 seconds to propagate through the system.

[Create a New Billable Type](#)

	Type	Rate	Variable	Active		
Edit	Delete	Hours	\$125.00	no	true	Deactivate
Edit	Delete	N/A	\$0.00	yes	false	Reactivate
Edit	Delete	Parts	\$0.00	yes	true	Deactivate
Total:		3 types				

Usage Tips

Create different Billable Types to track costs associated with Service Orders. For example, you could create a Billable Type to track the number of hours worked on a particular Service Order.

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Please refer to Figure XXIII-5 for steps 9 through 12.

9. When editing or creating a new Billable Type enter a Description of the type that will appear in the *Type* list box when creating new Billable Items.
10. If appropriate, enter the rate that SPoTS will use to calculate the total cost of each Billable Item entry. (The cost is calculated by multiplying the Billable Item quantity by the rate associated with the selected Billable Type.)
11. Indicate whether or not the Billable Type is *active* or *inactive*. Inactive items are now displayed to the end-user when they are creating new Billable Items. (Making a Billable Type inactive is normally used when a particular type has been used in the past, but is no longer appropriate to use in the future.)
12. Indicate whether or not the rate is *variable* by checking or clearing the *Variable* checkbox. If a Billable Type is configured to be variable, then a user creating a new Billable Item using this type can manually enter the Billable Item cost. If a Billable Item is not variable, the system automatically calculates the cost of the Billable Item entry by multiplying the quantity entered by the configured rate. If the Billable Type is not variable, the user may not manually enter the Billable Item cost.

Figure XXIII-5

The screenshot displays the SPOTS web application interface. At the top, there is a navigation bar with links: home, main menu, switch projects, logoff, cust search, company report, project report, new service order, and s/o search. The current project is identified as 'Shipping/Delivery Services'. Below the navigation bar, a message states: '(The new billable type may take several minutes to appear throughout the system.)' The main content area is divided into two sections. The first section, titled 'Enter Information for the New Billable Type', contains a form with the following fields and controls: 'Billable Type Description:' (text input), 'Rate: \$0.00' (text input), 'Active Status:' with radio buttons for 'Active' (selected) and 'Inactive', and 'Variable:' with a checkbox. There are 'Create' and 'Reset' buttons at the bottom of the form. The second section, titled 'Usage Tips', contains a bulleted list of instructions for creating and using billable types.

Enter Information for the New Billable Type

Billable Type Description:

Rate: \$0.00

Active Status: Active Inactive

Variable:

Usage Tips

- Track costs associated with Service Orders and Projects using Billable Types. For example, if creating a Billable Type named "Hours" for each hour worked on a Service Order, you might enter 50.00 in the *Rate* field to charge \$50 for each hour worked.
- If a Billable Type is designated as *variable*, the user entering billable items of this type may enter its total cost. If the Billable Type is not variable, the item cost is automatically calculated based upon the quantity entered by the user.
- If a Billable Type is made *inactive* new Billable Items of this type cannot be created. However, existing Billable Items are unaffected.

XXIV. How to Create a Billable Item

A. *Overview, Intended Audience, and Prerequisites*

This section describes how to create Billable Items used to track costs associated with a trouble ticket or sales associated with a Service Order. It is intended for all users. In order to create Billable Items you must have first registered for an account, created at least one project, and created at least one Billable Type. (Only an account or project administrator can create a Billable Type.) You may also find it helpful to review the following sections prior to proceeding with this section:

1. *Application Architecture*
2. *How to Create a New Project.*
3. *How to Create a Billable Type.*

And in the *What Is* section:

4. The *What is a Service Order* sub-section.
5. The *What is a Project* sub-section.
6. The *What are Billable Types and Billable Items* sub-section.

Billable Items are directly associated with trouble ticket or Service Order. You may create as many Billable Items as necessary for each Service Order within a project. Billable Items are indirectly associated with a customer through a Service Order. That is, if a Service Order has a customer associated with it, then any Billable Items belonging to that Service Order are also associated with the customer.

B. Instructions

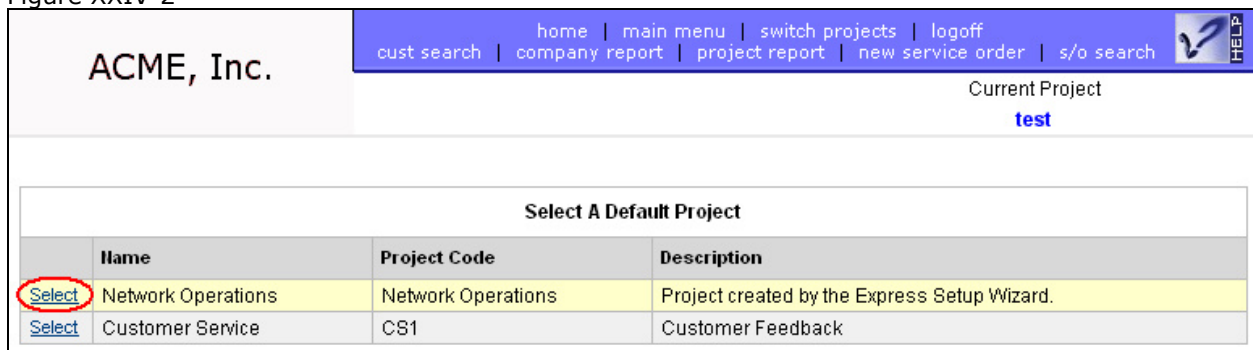
1. Login to your account.
2. Click the *switch projects* link at the top of your browser as shown in Figure XXIV-1.

Figure XXIV-1



3. Select the project from the switch projects page for which you want to specify default service order attribute entries as shown in Figure XXIV-2.

Figure XXIV-2



4. Open an existing trouble ticket / Service Order or create a new one.
5. Select the *billing* tab as shown in figure XXIV-3.

Figure XXIV-3

6. Select the *Create New Billing Entries* link at the upper left-hand portion of the *Billing Entries* page as shown in figure XXIV-4.

Figure XXIV-4

Entry #	Date	Quantity	Type	Rate	Cost	Description	User	Author
Totals: 0 Entries		0 Items			\$0.00			

7. Enter appropriate values into the following fields for each Billable Item: Date, User, Billable Type, and Quantity. Each Billable Item requires the aforementioned fields. If the type of Billable Item chosen is variable, like the "Parts" type chosen in the second line of figure XXIV-5, you may optionally enter a Rate and/or Cost. You may also enter a short description for each Billable Item.

If the entry you choose from the *Type* list box is configured to be variable, the *Rate* and *Cost* fields will be automatically enabled by the system. However, if the Billable Type is fixed, the *Rate* and *Cost* fields will be disabled. This is done because SPoTS automatically calculates the cost of any Billable Item entry using a fixed type based upon the quantity entered.

Note that you may click the calendar icon (highlighted in the green square of Figure XXIV-5) to ease the task of entering a date.

Figure XXIV-5

Enter One or More Billable Items for Service Order 24

Date (yyyy-mm-dd):	User:	Type:	Quantity:	Rate:	Cost:	Description:
2007-04-02	beckyhayes	Hours	8	\$55	440	Configured 4 new Laptops.
2007-04-02	beckyhayes	Parts	4	\$1275.75	\$5103	4 Laptops at \$1275.75 apiece.
	admin4959	Hours	0	\$55	0	
	admin4959	Hours	0	\$55	0	
	admin4959	Hours	0	\$55	0	
	admin4959	Hours	0	\$55	0	
	admin4959	Hours	0	\$55	0	

Create Cancel Reset

Usage Tips

- Use this page to create one or more Billable Items associated with the Service Order. These entries can be used to track hours, parts, or other charges incurred in resolving a Service Order.
- When creating a Billable Item, you must specify the Date upon which the Item was incurred, the User responsible for the Item, the Item Type, the Item Quantity, and the Item Cost.
- Depending upon the selected Type, you may or may not be able to enter an associated Rate or Cost. For example, if your account administrator has configured an "hourly" Type, they may have specified that the Rate associated with that type is fixed at \$75 / hour. If this were the case, selecting the "Hours" entry from the Type listbox would disable the Rate and Cost fields. The system will then automatically calculate the Billable Item Cost based upon the value entered into the Quantity field.

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- You may enter from one to seven Billable Items on a single page. When finished entering information, click the *Create* button. The newly created Billable Items will be displayed on the *Billing Entries* page as shown in figure XXIV-6.

Figure XXIV-6

Billing Entries For Service Order: 24

Create New Billing Entries

Entry #	Date	Quantity	Type	Rate	Cost	Description	User	Author
Delete 1	2007-04-02	4	Parts	\$1,275.00	\$5,103.00	4 Laptops at \$1275.75 apiece.	beckyhayes	admin4959
Delete 2	2007-04-02	8	Hours	\$55.00	\$440.00	Configured 4 new Laptops.	beckyhayes	admin4959
Totals: 2 Entries		12 Items			\$5,543.00			

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XXV. How to Create a Custom Report Using a Custom Report Builder

A. Overview, Intended Audience, and Prerequisites

This section describes how to create a Custom Report using a Custom Report Builder page. In order to create a Custom Report you must have first registered for an account and created at least one project. You may also find it helpful to review the following sections prior to proceeding with this section:

1. *Application Architecture*
2. *How to Create a New Project.*

And in the *What Is* section:

1. The *What is a Service Order* sub-section.
2. The *What is a Project* sub-section.
3. The *What are Custom Reports and What is the Custom Report Builder* sub-section.

There are three types of Custom Reports:

1. Those containing Customer data created using the *Customer Report Builder*.
2. Those containing Service Order data for a single project created using the *Project Report Builder*.
3. Those containing Service Order data across all projects created using the *Company Report Builder*.

Figure XXV-1

The screenshot shows the SPoTS web application interface. The top navigation bar includes links for 'home', 'main menu', 'switch projects', 'logoff', 'cust search', 'company report', 'project report', 'new service order', 'new customer', and 'service order search'. The 'Reports' tab is highlighted in the main navigation bar. Below the navigation bar, the 'Main Menu - Reports' section is displayed. It features a 'Report Builder Reports' section with three tabs: 'project report builder', 'company report builder', and 'customer report builder'. The 'customer report builder' tab is selected. Below the tabs is a table of saved reports with columns for 'Saved Report Name', 'Project', 'Report Owner', and 'Public/Private'. The table contains several rows of reports, including 'Customers - All', 'Customers - Owned By admin4959', 'Service Orders - All - All Projects', 'Service Orders - All - Customer Service', 'Service Orders - All - Property Management', 'Service Orders - All - Reported By admin4959', 'Service Orders - All - Reported To admin4959', 'Service Orders - All - Shipping/Delivery Services', 'Service Orders - All - Software Development', and 'Service Orders - All - Telecommunications'. Below the table are two buttons: 'Other Shipping/Delivery Services' Project Reports' and 'Other Company Reports'. Each button has a list of report types: 'Performance/Statistical Reports', 'Filtered Billing Reports', and 'Filtered Service Order Report (Old Project Report)' for the first button, and 'Performance/Statistical Reports', 'Filtered Billing Reports', 'Filtered Customer Report', and 'Filtered Service Order Report (Old Company Report)' for the second button.

			Saved Report Name	Project	Report Owner	Public/Private
run	edit	delete	Customers - All		admin4959	Public
run	edit	delete	Customers - Owned By admin4959		admin4959	Private
run	edit	delete	Service Orders - All - All Projects		admin4959	Public
run	edit	delete	Service Orders - All - Customer Service	Customer Service	admin4959	Public
run	edit	delete	Service Orders - All - Property Management	Property Management	admin4959	Public
run	edit	delete	Service Orders - All - Reported By admin4959		admin4959	Private
run	edit	delete	Service Orders - All - Reported To admin4959		admin4959	Private
run	edit	delete	Service Orders - All - Shipping/Delivery Services	Shipping/Delivery Services	admin4959	Public
run	edit	delete	Service Orders - All - Software Development	Software Development	admin4959	Public
run	edit	delete	Service Orders - All - Telecommunications	Telecommunications	admin4959	Public

The *Customer Report Builder*, *Project Report Builder*, and *Company Report Builder* are accessible from either the *Reports* tab (as shown in Figure XXV-1) or the *Dashboard* tab (as shown in Figure XXV-2). All three Custom Report Builder pages operate in essentially the same fashion. They differ only in the fields available for use in building the report. Because the process of building a custom report is the same for each of the three pages, the instructions provided below use only the *Project Report Builder* page for demonstrative purposes.

Figure XXV-2

The screenshot shows the SPoTS software interface. The top navigation bar includes 'home', 'main menu', 'switch projects', 'logoff', 'cust search', 'company report', 'project report', 'new service order', 'new customer', and 'service order search'. The 'Dashboard' tab is selected. Below the navigation bar, there are three search sections: 'Search for a Service Order in Project: Software Development', 'Search for a Customer', and 'Report Builder Reports'. The 'Report Builder Reports' section contains a table with the following data:

			Saved Report Name	Project	Report Owner	Public/Private
run	edit	delete	Customers - All		admin4959	Public
run	edit	delete	Customers - Owned By admin4959		admin4959	Private
run	edit	delete	Service Orders - All - All Projects		admin4959	Public
run	edit	delete	Service Orders - All - Customer Service	Customer Service	admin4959	Public
run	edit	delete	Service Orders - All - Property Management	Property Management	admin4959	Public
run	edit	delete	Service Orders - All - Reported By admin4959		admin4959	Private
run	edit	delete	Service Orders - All - Reported To admin4959		admin4959	Private
run	edit	delete	Service Orders - All - Shipping/Delivery Services	Shipping/Delivery Services	admin4959	Public
run	edit	delete	Service Orders - All - Software Development	Software Development	admin4959	Public
run	edit	delete	Service Orders - All - Telecommunications	Telecommunications	admin4959	Public

B. Instructions

1. Login to your account.
2. Click on either the *Dashboard* tab as shown in Figure XXV-1 or the *Reports* tab as shown in Figure XXV-2.
3. Create a custom report containing Service Order / trouble ticket data for your currently selected project by clicking the *project report builder* link. (To create a custom report containing Customer data, click on the *customer report builder* link. To create a custom report containing Service Order data across projects, click the *company report builder* link.)

(The steps described below assume that you are creating a custom report containing Service Orders for your current project. The process is essentially the same when using the *customer report builder* or the *company report builder*. The only difference is the fields that are available to you when creating your report criteria.)

4. The first step in creating your custom report is to define your *Current Report Criteria*. These criteria are applied to the data within your account to generate your report. Please refer to Figures XXV-3, XXV-4, and XXV-5 to complete this step.

These instructions demonstrate the creation of a report that returns all unresolved Service Orders reported to the "Customer Service" group or to "Chris Logan". (Of course, the groups and individuals in your own account will differ from these values.)

Follow steps a – c below to define the *Current Report Criteria* as described above.

- a. Select "equals" from the first drop-down list box and "Customer Service" from the second drop-down list box in the row containing the *Reported to Group* label. Then click the *add criterion* link (as shown in Figure XXV-3) to add the criterion to the *Current Report Criteria* list box.

Figure XXV-3

SPOTS[®]
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Demonstration Company

home | **main menu** | switch projects | logoff
cust search | company report | project report | new service order | new customer | service order search

Custom Report Builder

(Click [here](#) to access the old Project Report page.)

Project: **Software Development**

Reported to Group:	equals	Customer Service	add criterion ↓
Reported to Individual:	equals		add criterion ↓
Priority:	equals		add criterion ↓
Phase:	equals		add criterion ↓
Reported By:	equals		add criterion ↓
Severity:	equals		add criterion ↓
Category:	equals		add criterion ↓
Status:	equals		add criterion ↓
Module:	equals		add criterion ↓
Type:	equals		add criterion ↓
Author:	equals		add criterion ↓
Reported Version:	equals		add criterion ↓
Resolved Version:	equals		add criterion ↓
Date Opened (yyyy-mm-dd):	equals	<input checked="" type="checkbox"/> current day or <input type="text"/>	add criterion ↓
Date Resolved (yyyy-mm-dd):	equals	<input checked="" type="checkbox"/> current day or <input type="text"/>	add criterion ↓
Customer:	equals	<input type="text"/>	add criterion ↓
Due Date (yyyy-mm-dd):	equals	<input checked="" type="checkbox"/> current day or <input type="text"/>	add criterion ↓
Summary:	like	<input type="text"/>	add criterion ↓
Service Order:	is not	Resolved	add criterion ↓

Current Report Criteria

Remove Selected Criteria

Grouping and Logic

- b. Select "equals" from the first drop-down list box and "chrislogan" from the second drop-down list box in the row containing the *Reported to Individual* label. Then click the *add criterion* link (as shown in Figure XXV-4) to add the criterion to the *Current Report Criteria* list box.

Figure XXV-4

- c. Referring to Figure XXV-5, select "is not" from the drop-down listbox in the row containing the *Service Order* label. After clicking the *add criterion* link, the *Current Report Criteria* listbox will contain 3 rows.

Figure XXV-5

Use the Grouping and Logic field to specify how you would like to logically group the Report Criteria. Use the numeric value of each criterion you've entered into the *Current Report Criteria* listbox. For example, if you've entered 4 different criteria, you might specify a logical grouping value of: (1 OR 2) AND (3 OR 4). Alternately, you could specify: (1 OR 2 OR 3) AND 3. The only tokens allowed in this field are the numeric criteria values from the *Current Report Criteria* listbox, parenthesis, and the logical expressions *AND* and *OR*.

5. The next step in creating a custom report is to define the *Grouping and Logic* value.

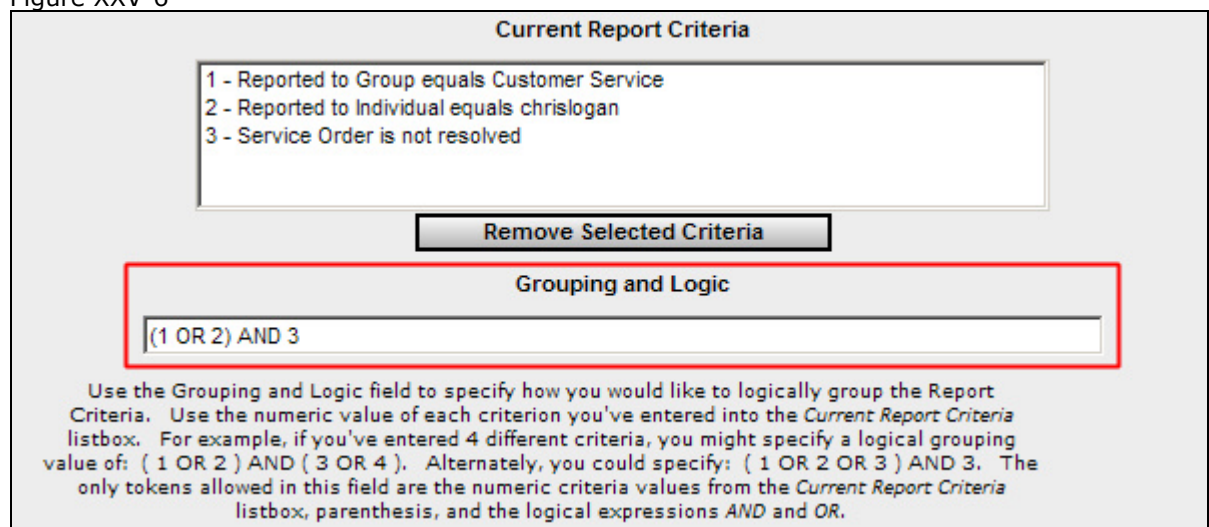
The *Grouping and Logic* field is used to specify how you would like to logically group the Report Criteria. After completion of the previous step, the *Grouping and Logic* field will contain the values "1 AND 2 AND 3" as shown in Figure XXV-5.

Because the report should retrieve all unresolved tickets that are reported to "Customer Service" **or** "chrislogan", the contents of the Grouping and Logic field must be modified to read "(1 OR 2) AND 3". Substituting the textual description of each criterion, this causes the system to return all tickets where:

(the *Reported to Group* field equals "Customer Service" OR the *Reported to Individual* field equals "chrislogan") AND the Service Order is not resolved

Once properly modified, the Grouping and Logic field should appear as shown in Figure XXV-6.

Figure XXV-6



Current Report Criteria

1 - Reported to Group equals Customer Service
2 - Reported to Individual equals chrislogan
3 - Service Order is not resolved

Remove Selected Criteria

Grouping and Logic

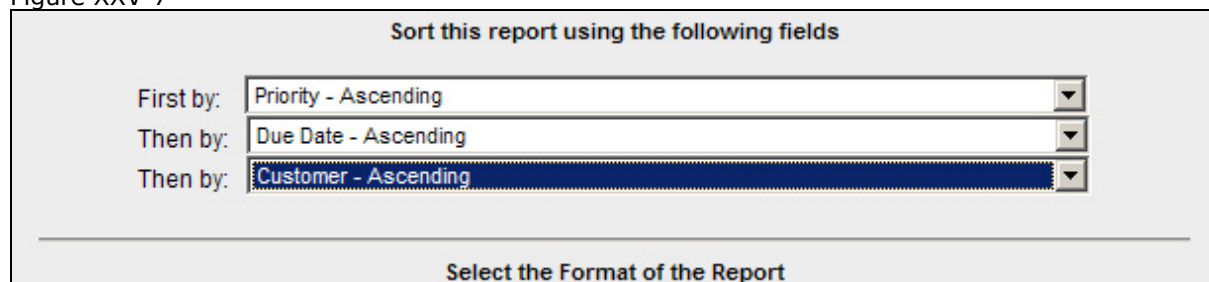
(1 OR 2) AND 3

Use the Grouping and Logic field to specify how you would like to logically group the Report Criteria. Use the numeric value of each criterion you've entered into the *Current Report Criteria* listbox. For example, if you've entered 4 different criteria, you might specify a logical grouping value of: (1 OR 2) AND (3 OR 4). Alternately, you could specify: (1 OR 2 OR 3) AND 3. The only tokens allowed in this field are the numeric criteria values from the *Current Report Criteria* listbox, parenthesis, and the logical expressions AND and OR.

6. The next step in creating the report is to specify the order in which the results should be displayed. You may specify up to 3 fields by which the report should be sorted.

In this example, the results will be sorted first by Priority, then by Due Date, and finally by Customer as shown in Figure XXV-7.

Figure XXV-7



Sort this report using the following fields

First by: Priority - Ascending

Then by: Due Date - Ascending

Then by: Customer - Ascending

Select the Format of the Report

7. Next, choose the format for the report. Choose from one of the following options as shown in Figure XXV-8:
- Quick Report – this format displays the fields usually considered to be the most relevant or important.
 - Summary Report – this format displays all the fields on the Service Order Summary tab.
 - Comprehensive Report – this format displays all the fields on the Service Order Summary tab as well as the Descriptions, Comments, Resolutions, and Attachments tabs.
 - XML Report – this format is downloaded to your workstation in XML format and contains all Service Order information.
 - Excel (Multiple Worksheet) – this format is downloaded to your workstation in Microsoft Excel format. The downloaded spreadsheet contains different worksheets for each type of information (i.e. one worksheet containing the Service Order Summary tab, another worksheet containing the Service Order Descriptions tab, etc.).
 - Excel (Single Worksheet) – this format is downloaded to your workstation in Microsoft Excel format. The downloaded spreadsheet contains a single worksheet containing all Service Order information.

Figure XXV-8

Select the Format of the Report

Quick Report
 Summary Report
 Comprehensive Report
 XML Report (downloaded)
 Excel - Multiple Worksheet (downloaded)
 Excel - Single Worksheet (downloaded)

(Downloaded reports may take an extended period of time to generate.)

Number of Service Orders to display per page:

8. Choose the number of Service Orders / tickets to display on each page of the report. The default value of this field is 50 tickets. Note that this field is only applicable to the Quick, Summary, and Comprehensive report formats. (XML and Excel formats contain all information matching the criteria defined for the report.)
9. Enter a value into the report name edit field as shown in Figure XXV-9.

Figure XXV-9

Enter a name for this report

Report is public
 Report is editable by all users

10. Specify whether or not the report should be public by checking or clearing the *Report is public* checkbox and whether or not the report is publicly editable by checking or clearing the *Report is editable by all users* checkbox.

Reports designated as public can be executed or run by any user within your account. Reports designated as *editable by all users* can be changed by anyone within your account. If a report is not designated as public, it can only be viewed, executed, or modified by the individual that created it.

- To save the report, click the *Save* button.

Once saved, the report will appear in the *Report Builder Reports* list box displayed on the Dashboard tab and the Reports tab as shown in Figure XXV-10.

Figure XXV-10

The screenshot shows the 'Report Builder Reports' table with the following data:

			Saved Report Name	Project	Report Owner	Public/Private
run	edit	delete	All Unresolved - Cust Service or Chris Logan	Shipping/Delivery Services	admin4959	Public
run	edit	delete	Customers - All		admin4959	Public
run	edit	delete	Customers - Owned By admin4959		admin4959	Private
run	edit	delete	Service Orders - All - All Projects		admin4959	Public
run	edit	delete	Service Orders - All - Customer Service	Customer Service	admin4959	Public
run	edit	delete	Service Orders - All - Property Management	Property Management	admin4959	Public
run	edit	delete	Service Orders - All - Reported By admin4959		admin4959	Private
run	edit	delete	Service Orders - All - Reported To admin4959		admin4959	Private
run	edit	delete	Service Orders - All - Shipping/Delivery Services	Shipping/Delivery Services	admin4959	Public
run	edit	delete	Service Orders - All - Software Development	Software Development	admin4959	Public

You can then run, edit, or delete the report by clicking the *run*, *edit*, or *delete* links in the appropriate row.

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