

Tips and Tricks

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Help Desk Manager



PCR°360™

Multiple Remove Actions

- The Problem:
 - Adding multiple Remove Actions for the same Service can result in bad data.
 - This can also run into problems with the Service ID change Action type as it also sets Services to the Inactive state.
 - Completing the first Remove Action will make the Second Remove Action inaccessible.
 - The Service ID is no longer valid.



Multiple Remove Actions

- Example: What not to do

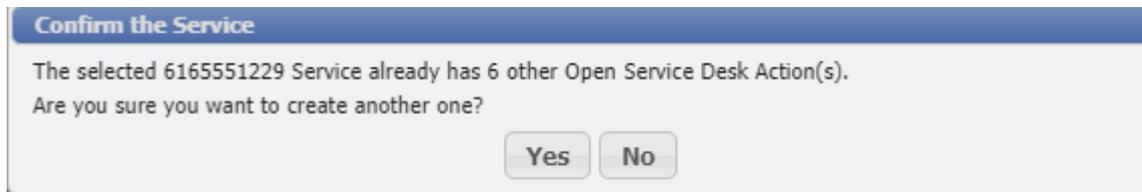
The screenshot displays the 'Manage Service Order' application interface. At the top, the window title is 'Manage Service Order' and the 'Options' menu is visible. The main header shows the Service Order ID 'SO202300098' and a 'Due Date' field. Below this, there are several dropdown menus for 'SD Type' (Service Order), 'Source' (Web), 'Status' (Pending), and 'Service Rep' (Sokolowski, Jeremiah). A 'Description' field with 'Characters left: 500' is also present. On the right, a 'Last Modified' box indicates the user 'jsokolowski' and the date '09/13/2023 12:15:19'. Below the header, there are radio buttons for 'Contact Owner' and 'Department Owner' (selected), along with fields for 'Owner - Department', 'Billing Group', 'Requestor', and 'Associated Project'. An 'Urgency' icon is also visible. The main content area has a tabbed interface with 'Actions' selected. Below the tabs, there is a toolbar with 'Add', 'Edit Selected', 'Delete Selected', 'Print', 'Report', and 'Perspectives' options. The central table lists actions for the service order:

Action #	Action	Service	Orig Catalog	Status	Urgency	New Service ID	New Catalog
001	Remove	6165551229	Avaya VOIP	Pending		(616) 555-1229	Avaya VOIP
002	Remove	6165551229	Avaya VOIP	Pending		(616) 555-1229	Avaya VOIP
003	Miscellaneous	6165551229	Avaya VOIP	Pending		(616) 555-1229	Avaya VOIP
004	Add Locations	6165551229	Avaya VOIP	Pending		(616) 555-1229	Avaya VOIP
005	Move	6165551229	Avaya VOIP	Pending		(616) 555-1229	Avaya VOIP
006	Service ID	6165551229	Avaya VOIP	Pending		(616) 555-1229	Avaya VOIP
007	Upgrade/Dow...	6165551229	Avaya VOIP	Pending		(616) 555-1229	Avaya VOIP
008	Swap	6165551229	Avaya VOIP	Pending		(616) 555-1229	Avaya VOIP
009	Owner	6165551229	Avaya VOIP	Pending		(616) 555-1229	Avaya VOIP

At the bottom, there is a 'Rows Per Page' dropdown set to 25, a 'Page: 1' indicator, and a 'Data Loaded' status.

Multiple Remove Actions

- Example:
 - The confirmation dialog pops up:



- This should be a Yellow Alert



Multiple Remove Actions

- The other Actions all lose the reference

The image displays two screenshots of a 'Manage Service Desk Action' form. The top screenshot shows a 'Remove' action with a 'Service' field containing the value '6165551229'. The bottom screenshot shows a 'Service ID' action with an empty 'Service' field. Both 'Service' fields are highlighted with red boxes.

Manage Service Desk Action

Data Saved Successfully

Action: Remove Status: Complete * Service: 6165551229 Reference:

Contact Owner Department Owner Owner - Department: Facilities: Facilities Billing Group: Workers SLA: Service Options: Billable

Location: Main Campus > Carruthers Hall > 1 > A Move To Location: Service: A

Manage Service Desk Action

SD#: SO202300098 Action#: 006 Due Date: Start Date: Last Modified User: Jeremiah Date: 09/13/2023 12:14:18

Action: Service ID Status: Pending * Service: Reference:

Contact Owner Department Owner Owner - Department: Facilities: Facilities Billing Group: Workers SLA: Service Options: Billable

Location: Main Campus > Carruthers Hall > 1 > A Move To Location: Service Host: Avaya Urgency

Multiple Remove Actions

- Here the Action is set to Void and Saved.

Manage Service Desk Action

SD#: SO202300098 Action#: 006 Due Date: Start Date:

Action: Status: * Service: Phone Number:

Service ID Void

Contact Owner Owner - Department: Value is required and can't be empty SLA:

Department Owner Facilities: Facilities Workers

Location: Move To Location:

Main Campus > Carruthers Hall > 1 > A



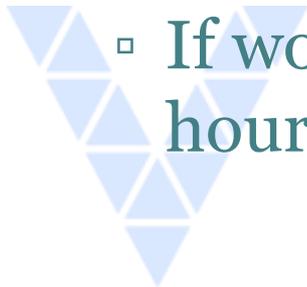
Multiple Remove Actions

- The Solution:
 - Do not add multiple Remove Actions for the same Service.
 - Request a Custom Validation to prevent adding a Remove for a Service if another already exists.
 - Contact PCR to have the data adjusted manually.



Backup and Event Timing

- The Problem:
 - The server tends to slow down when there are background Events running
 - Backing up the database
 - Syncing new Contacts / GLAs
 - Running Imports / Exports / Call Processing
 - PCR schedules these after normal business hours.
 - If workers are working outside of normal business hours they may experience slowness.



Backup and Event Timing

- **The Solution:**
 - When people are on after normal hours, contact PCR ahead of time.
 - We can adjust the start time of events, particularly the nightly backups as needed.
 - This way Users will be able to access the system at normal speeds.



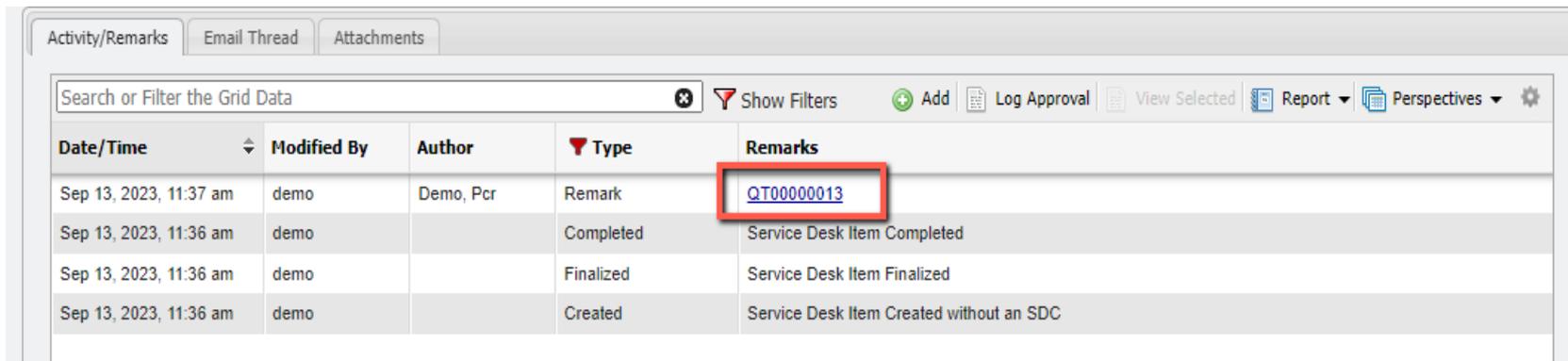
SD Link in Remarks

- Feature Alert! -> 2022.1.6 is out now!
- Service Desk Number renders as a link in the grid now as of 2022.1.6 release.
- This works with all Service Desk Numbers
- Mirrors the existing functionality where related Actions are linked automatically, like on a Service ID change:



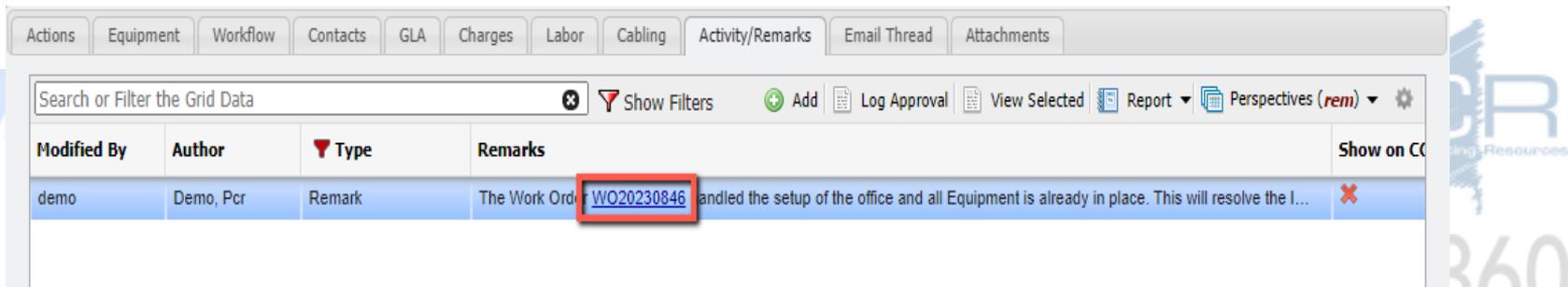
SD Link in Remarks

- Example One:



The screenshot shows a software interface with a table. The table has columns for Date/Time, Modified By, Author, Type, and Remarks. The first row has a link in the Remarks column that is highlighted with a red box.

Date/Time	Modified By	Author	Type	Remarks
Sep 13, 2023, 11:37 am	demo	Demo, Pcr	Remark	QT00000013
Sep 13, 2023, 11:36 am	demo		Completed	Service Desk Item Completed
Sep 13, 2023, 11:36 am	demo		Finalized	Service Desk Item Finalized
Sep 13, 2023, 11:36 am	demo		Created	Service Desk Item Created without an SDC



The screenshot shows a software interface with a table. The table has columns for Modified By, Author, Type, Remarks, and Show on CC. The first row has a link in the Remarks column that is highlighted with a red box.

Modified By	Author	Type	Remarks	Show on CC
demo	Demo, Pcr	Remark	The Work Order WO20230846 handled the setup of the office and all Equipment is already in place. This will resolve the I...	✖

SD Link in Remarks

- Example Two:

Manage Service Desk Activity

Show on CustomerCenter:

[* Edit Remarks](#) [View Remarks](#)

Remarks:

The Work Order [WO20230846](#) handled the setup of the office and all Equipment is already in place.
This will resolve the Incident [IN20230847](#) once the Service Order is complete.
Respond to the customer per their request for the Estimate [ES20230864](#) that this Service Order was converted from.
All SD Items are grouped on Project [PR20230849](#).

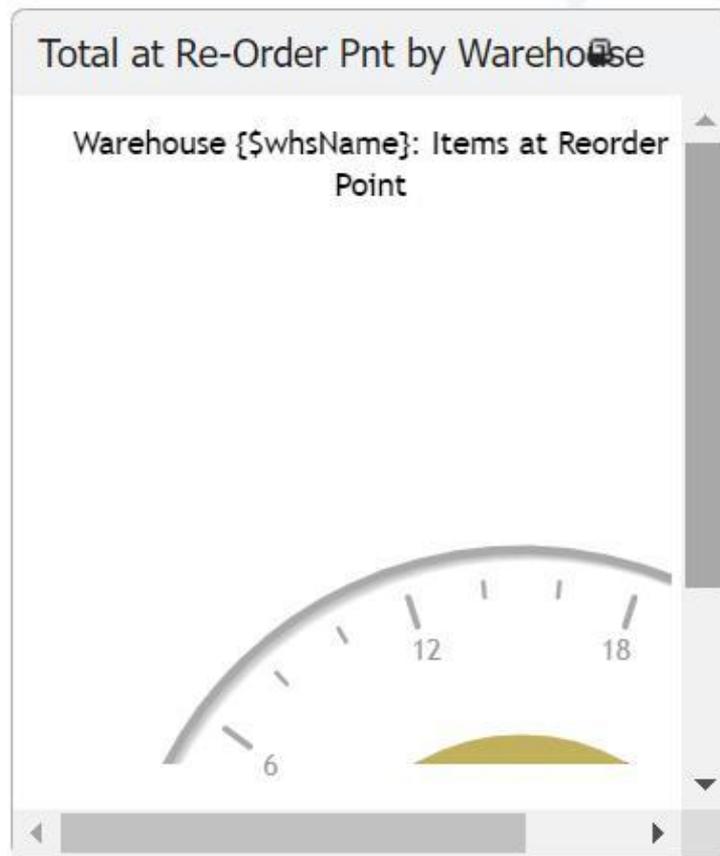


Windows Sizing problem and you

- The Problem:
- Windows default used to be 100 % but the newest version is default to 125%
- Setting Windows to the 125% vs 100 % scale messes up the gauge on the home page for the Reorder point widget.

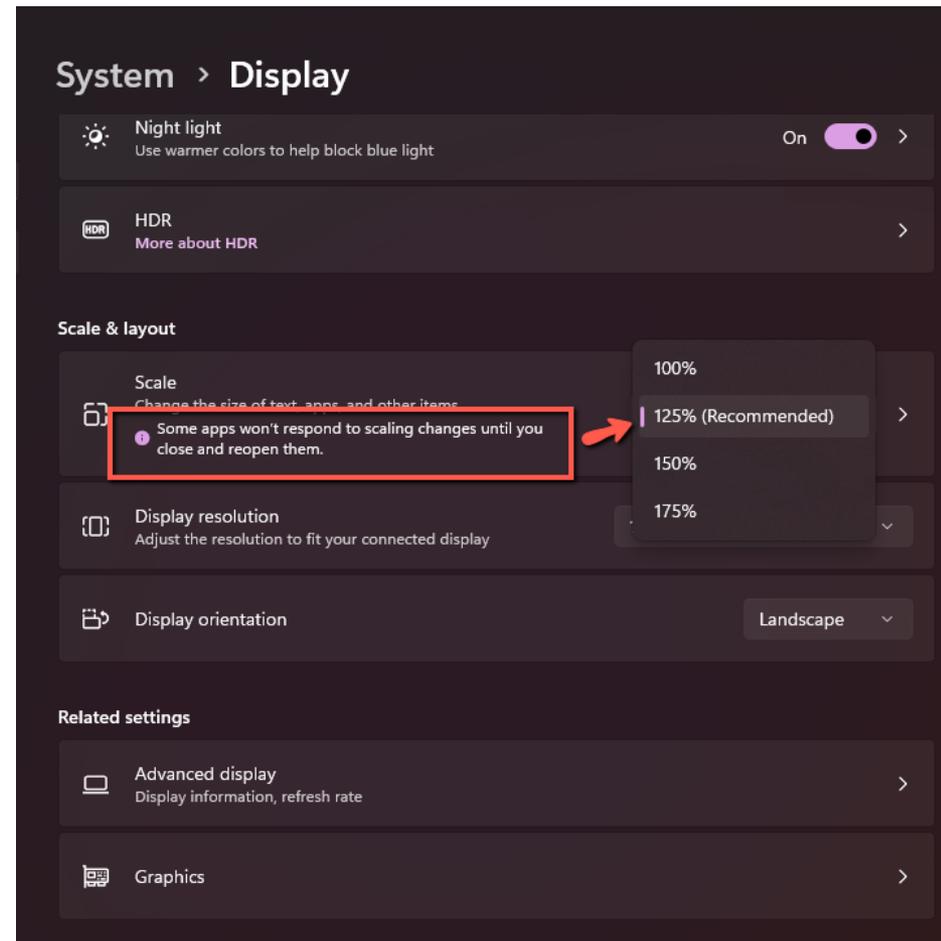
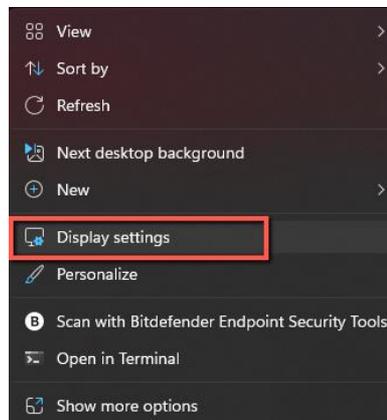


Windows Sizing problem and you



Window Sizing problems and you

- The Solution:
 - Override the
 - Windows default and
 - set back to 100%
- Thanks Microsoft



Grid Filtering: Match Any magic

- Feature Alert!
- Customers have asked for more complex filter options like combining the AND/OR option.
- Group 1 (AND) Group 2 (OR) Group 3
- This would mean the filter should include things only if they are in both Group 1 and Group 2 but also anything that matches in Group 3



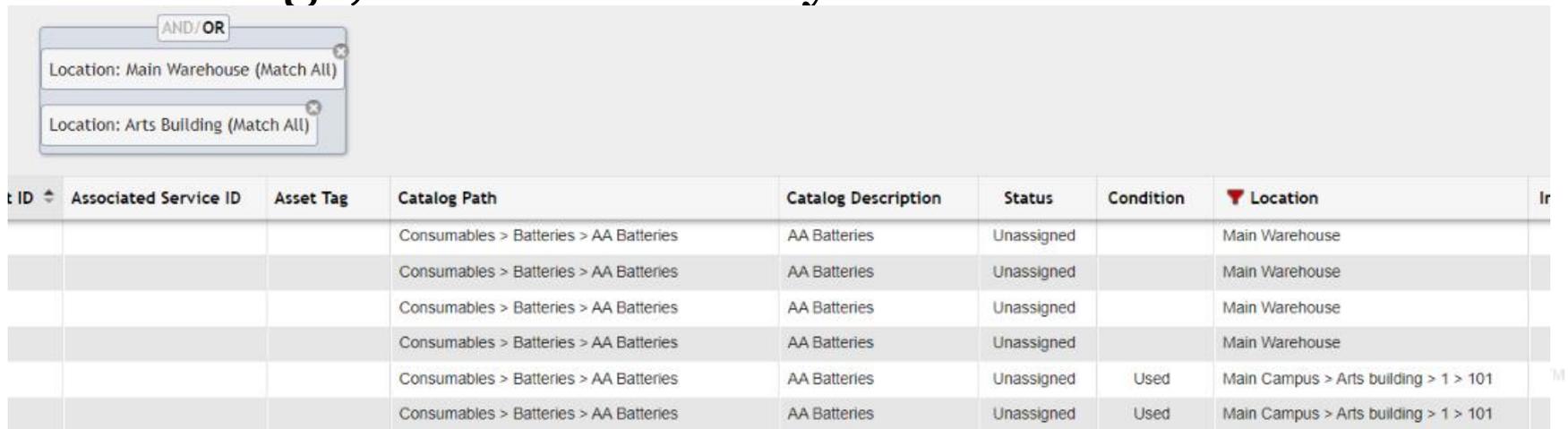
Grid Filtering: Match Any magic

- We have declined this change in the past for a number of reasons.
 - More complex filter logic can get complicated and hard to read even for experienced programmers.
 - This kind of change affects every grid for all customers and would be a massive undertaking.
 - This additionally “technical debt” can grid other development to a halt.



Grid Filtering: Match Any magic

- Did you know “Match Any” can be used as if it was an “OR”?
- Not everything needs to be in the same Filter for this to work
- For example, if I were to filter for Service Catalogs, I could filter by each item with “OR”



Item ID	Associated Service ID	Asset Tag	Catalog Path	Catalog Description	Status	Condition	Location	Item ID
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned		Main Warehouse	
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned		Main Warehouse	
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned		Main Warehouse	
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned		Main Warehouse	
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned	Used	Main Campus > Arts building > 1 > 101	
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned	Used	Main Campus > Arts building > 1 > 101	

Grid Filtering: Match Any magic

- Combining across multiple filters
- “Main Warehouse, Arts Building”

AND/OR

Catalog Path: AA Batteries (Match All)

Location: Main Warehouse, Arts Building (Match Any)

ID	Associated Service ID	Asset Tag	Catalog Path	Catalog Description	Status	Condition	Location	In Warehouse	Owner
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned				
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned				
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned				
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned				
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned				
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned				
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned				
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned				
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned		Main Warehouse	✓	
			Consumables > Batteries > AA Batteries	AA Batteries	Unassigned		Main Warehouse	✓	

Filter Location

Value: Type: Match All

Add Filter

Clear Filters

Sort Options:

Bill Process Report

- Quick review
- Missing Billing Group
- Missing Revenue GLA
- Unbillable

Bill Process Report Options ^ - + x

Bill Date: 07/01/2023 - 07/31/2023

Last Modified
User: demo
Date: 09/13/2023 11:31:24

Calls	0	\$0.00
Usage	0	\$0.00
Charges	27	\$879.69

Charge Totals By Source

Charge Source	Num Charges	Billed Amount
Services	25	\$809.71
Equipment	2	\$69.98
Service Desk	2	\$0.00

Charge Totals By Type

Charge Type	Num Charges	Billed Amount
Monthly Recurring	25	\$879.69

▶ Missing Billing Group - Service Desk Charges: 2



Bill Date:

02/01/2023 - 02/28/2023

Last Modified

User: pcr360-cli

Date: 02/08/2023 13:14:57

▶ Missing Revenue GLA - Equipment Charges: 8

▶ Unbillable - Equipment Charges: 30

▶ Missing Billing Group - Gla Charges: 227

▶ Missing Revenue GLA - Gla Charges: 6

▶ Unbillable - Gla Charges: 20

▶ Missing Billing Group - Services Charges: 81

▶ Missing Revenue GLA - Services Charges: 94

▶ Missing Record - Services Charges: 2

▶ Unbillable - Services Charges: 340

▶ Missing Billing Group - Service Desk Charges: 3

▶ Missing Revenue GLA - Service Desk Charges: 2

▶ Unbillable - Service Desk Charges: 7

Bill Process Report

Options ^ - ☰ ×

Bill Date:
06/21/2023 - 07/20/2023

Last Modified
User: pcr360-cli
Date: 06/27/2023 11:59:42

Calls **6** **\$0.14**

Billed Calls By Type

Calls Type	Count	Billable Amount
Local	5	\$0.00
Canada	1	\$0.14

▶ No rate defined for this call type: 5

Usage **22** **\$0.00**

Billed Usage By Type

Usage Type	Count	Billable Amount
Bandwidth	21	\$0.00
Data Storage	1	\$0.00

▶ No service record for service ID: 22

Charges **11798** **\$3,157,167.58**



Cool Custom Event

- Are you tired of entering Incidents manually for regular maintenance?
- Want to make scheduled maintenance automatic?
- Have we got a sweet Custom Event for you!
- <https://confluence.pcr.com/pcr360/latest/administration/custom-logic/custom-logic-library/custom-events-library/scheduled-maintenance>

Cool Custom Event

- Uses the Equipment UDF fields
- Hooks into the Custom Event
- Makes Incidents when the UDF date is matched

