

2024 Tips and Tricks

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Help Desk Manager

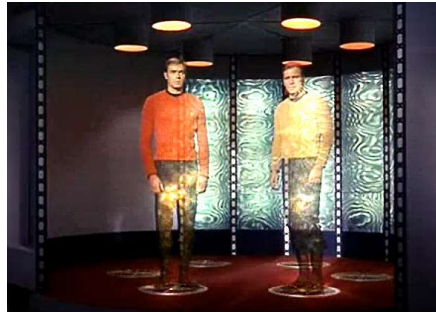


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Good <time>, I'm sure most of you recognize me by now, I see a lot of familiar faces, but for those who don't I'm your Help Desk Manager and this is our Tips and Tricks presentation. I'm just curious how many of you feel like an expert in PCR-360 at this point? That's a great response, and for those who don't feel like a pro yet, we wanted to go over some tips and tricks that will make you feel like Scottie from TNG. He's a miracle worker and you will be too.

Index

- Form Perspectives
- Inventory Overview
- GLA Replace / Bulk Update
- Coordinating Departments
- Lightning Round



So just a quick summary of the topics we are going to cover here. <List them off> So if your ready, "Beam me up Scotty".

Form Perspectives

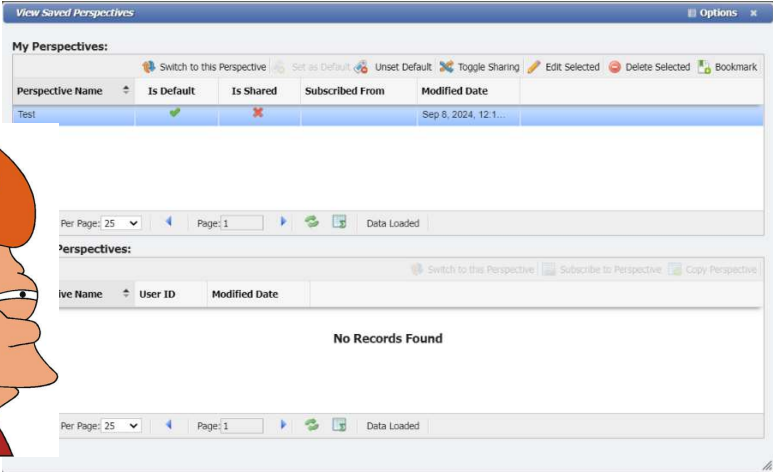
- My Add New form is nutty what gives?



So say you are opening some Add New form and there is a bunch of stuff there you aren't expecting. First off how did it get there? But secondly, how am I going to get rid of this and just get my normal form? You've been attacked by the Form Perspective Gremlin. They like to sneak into your Options menu and set the Form Perspectives to have a Default with other form data in them. Our Scottie hack here is to go back into the Options menu and take that little bugger out.

Form Perspectives

- Unset as the Default
- Or Delete



The screenshot shows a web interface titled "View Saved Perspectives". At the top, there are several action buttons: "Switch to this Perspective", "Set as Default", "Unset Default", "Toggle Sharing", "Edit Selected", "Delete Selected", and "Bookmark". Below these is a table with the following columns: "Perspective Name", "Is Default", "Is Shared", "Subscribed From", and "Modified Date". The table contains one row with the name "Test", a green checkmark in the "Is Default" column, a red X in the "Is Shared" column, and a date "Sep 8, 2024, 12:1...". Below the table, there is a pagination control showing "Per Page: 25", "Page: 1", and "Data Loaded". Below that, there is a section titled "Perspectives:" with buttons for "Switch to this Perspective", "Subscribe to Perspective", and "Copy Perspective". Below this is another table with columns "ive Name", "User ID", and "Modified Date", which is empty and displays "No Records Found". At the bottom, there is another pagination control identical to the one above.



We can Unset it as the Default or delete the Perspective outright. But what if we aren't sure why there was one before but we now think, "hey I might have a good idea to set some information as the Default?"

Form Perspectives

- Set one to store commonly entered data

The screenshot shows the 'Add New Phone Service' form. Key elements include:

- Phone Number:** Input field.
- Service Catalog:** Input field.
- Location:** Input field.
- Service Host:** Input field.
- Status:** Dropdown menu (set to 'Available').
- Status Date:** Input field.
- SLA:** Input field.
- Reference:** Input field (highlighted with a red box, containing 'Default').
- Company ID:** Input field.
- Owner - Department:** Input field.
- Billing Group:** Input field.
- Checkboxes:** Billable, Directory (checked), Essential, Report 911 (checked), Multiple Locations.
- Last Modified:** Section for User and Date.
- User Defined Fields:** Section containing a 'Cricket' field with the value 'Default' (highlighted with a red box).
- Navigation Tabs:** Charges, Expense GLAs, Call Details, Billing, Equipment, Cabling, Pools, Soft Numbers, Alias, Contacts, Remarks, Service Desk, Attachments.

We can now use this either as a Default, or Save the Perspective for later use. Maybe we don't want to always use these values, then we can just use it like we do with Grid Perspectives.

Form Perspectives

- Let's see an example



Inventory Overview

- What are all these columns for and why are they confusing?
- Where is my Equipment?
- How does Availability work?
- Reorder Threshold does what now?



Too many columns makes me overwhelmed.



Data that makes sense to me.

The Inventory Overview grid can be a bit overwhelming at first, but it's not as bad as you might think at first glance. Equipment is listed by the Warehouse Location that it has been associated with. Some people felt that made the counts of Equipment confusing. Is the Equipment a total count for the Location, or is the count for all descendant Locations too? There was some disagreement on this point. Then add on to that the Availability and Reorder thresholds. It leaves us with a recipe for disaster.



Inventory Overview

- How many do I have?

Inventory : Inventory Overview

Search or Filter the Grid Data Show Filters Set Threshold Bulk Add Bulk Transfer Order Purchase History

| Location Path | Eqp Catalog Path | Catalog Status | Part Number | Description | UOM | On Hand | Total On Hand | Pending |
|-----------------------------------|------------------------------|----------------|----------------|--------------------------------|------|---------|---------------|---------|
| Main Warehouse | SKO 857 | Active | SKO 857 | Avaya VOIP | Each | 5 | 11 | 9 |
| Main Warehouse > Storage Room ... | SKO 857 | Active | SKO 857 | Avaya VOIP | Each | 1 | 1 | 0 |
| North Site > Tech Truck One | SKO 857 | Active | SKO 857 | Avaya VOIP | Each | 3 | 3 | 0 |
| Main Warehouse > Storage Room ... | SKO 857 | Active | SKO 857 | Avaya VOIP | Each | 3 | 6 | 0 |
| Main Warehouse > Storage Room ... | SKO 857 | Active | SKO 857 | Avaya VOIP | Each | 2 | 2 | 0 |
| Main Warehouse > Storage Room ... | Accessories > iPhone 11 Case | Active | iPhone 11 Case | OtterBox Defender iPhone 11... | | 1 | 10 | 0 |



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The Inventory has a bunch of Columns, and you might find yourself asking what does each column mean. Units of Measure comes right from the Equipment record. “On Hand” is how many of this Equipment Catalog are in the specific Location. “Total On Hand” is a Roll up of how many of this Equipment Catalog are in this Location, and all the descendants of this Location. In the same way the “Pending” is a total of how many Equipment Catalogs are Pending on Service Desk items, coming out of that specific Location, while the Total Pending is the total of how many Equipment Catalogs are in that Location, and its descendant Locations. Staged and Picked Up are the totals for those two statuses. The Reorder threshold sets a level that the Equipment needs to be at, in that Location before triggering the Availability indicators.

Inventory Overview



- How many do I have?

Inventory : Inventory Overview

Search or Filter the Grid Data

Show Filters Set Threshold Bulk Add Bulk Transfer Order Purchase History

| Location Path | Eqp Catalog Path | Catalog Status | Part Number | Description | UOM | On Hand | Total On Hand | Pending |
|-----------------------------------|------------------------------|----------------|----------------|--------------------------------|------|---------|---------------|---------|
| Main Warehouse | SKO.857 | Active | SKO.857 | Avaya VOIP | Each | 5 | 11 | 9 |
| Main Warehouse > Storage Room ... | SKO.857 | Active | SKO.857 | Avaya VOIP | Each | 1 | 1 | 0 |
| North Site > Tech Truck One | SKO.857 | Active | SKO.857 | Avaya VOIP | Each | 3 | 3 | 0 |
| Main Warehouse > Storage Room ... | SKO.857 | Active | SKO.857 | Avaya VOIP | Each | 3 | 6 | 0 |
| Main Warehouse > Storage Room ... | SKO.857 | Active | SKO.857 | Avaya VOIP | Each | 2 | 2 | 0 |
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Inventory Overview



- How many do I have?

Inventory : Inventory Overview

Search or Filter the Grid Data

Show Filters Set Threshold Bulk Add Bulk Transfer Order Purchase History Eqp. Catalog Report Perspectives

| Location Path | Eqp Catalog Path | Catalog Status | On Hand | Total On Hand | Pending | Total Pending | Staged | Picked Up | On Order | Reorder | Availability |
|-----------------------------------|------------------|----------------|---------|---------------|---------|---------------|--------|-----------|----------|---------|--------------|
| Main Warehouse | 5KO 857 | Active | 5 | 11 | 5 | 9 | 0 | 0 | 0 | 5 | Low Stock |
| Main Warehouse > Storage Room ... | 5KO 857 | Active | 1 | 1 | 0 | 0 | 1 | 0 | 0 | | In Stock |
| North Site > Tech Truck One | 5KO 857 | Active | 3 | 3 | 0 | 0 | 0 | 0 | 0 | | In Stock |
| Main Warehouse > Storage Room ... | 5KO 857 | Active | 3 | 6 | 0 | 0 | 0 | 0 | 0 | | In Stock |
| Main Warehouse > Storage Room ... | 5KO 857 | Active | 2 | 2 | 0 | 0 | 0 | 0 | 0 | | In Stock |



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Inventory Overview

- How many do I have?

| Location Path | Eqp Catalog Path | Catalog Status | On Hand | Total On Hand | Pending | Total Pending | Staged | Picked Up | On Order | Reorder | Availability |
|-----------------------------------|------------------|----------------|---------|---------------|---------|---------------|--------|-----------|----------|---------|--------------|
| Main Warehouse | SKO 857 | Active | 5 | 11 | 9 | 9 | 0 | 0 | 0 | 5 | Low Stock |
| Main Warehouse > Storage Room ... | SKO 857 | Active | 1 | 1 | 0 | 0 | 1 | 0 | 0 | | In Stock |
| North Site > Tech Truck One | SKO 857 | Active | 3 | 3 | 0 | 0 | 0 | 0 | 0 | | In Stock |
| Main Warehouse > Storage Room ... | SKO 857 | Active | 3 | 6 | 0 | 0 | 0 | 0 | 0 | | In Stock |
| Main Warehouse > Storage Room ... | SKO 857 | Active | 2 | 2 | 0 | 0 | 0 | 0 | 0 | | In Stock |

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Inventory Overview

- How many do I have?

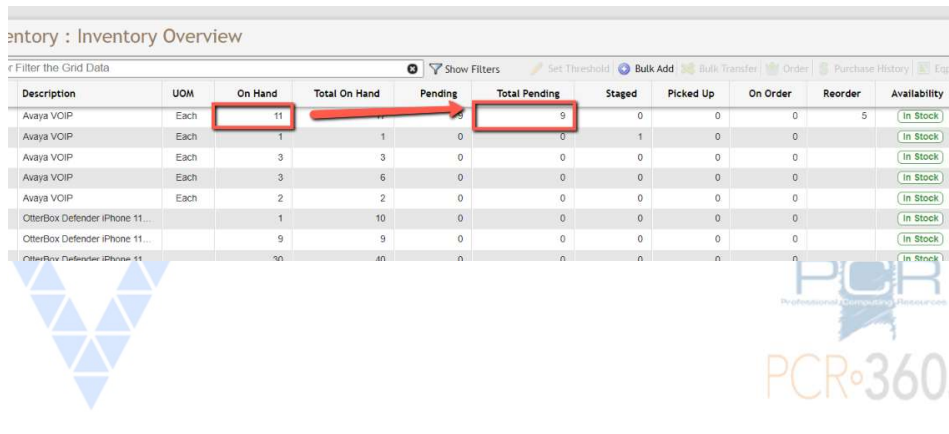
Inventory : Inventory Overview

| Location Path | Eqp. Catalog Path | Catalog Status | On Hand | Total On Hand | Pending | Total Pending | Staged | Picked Up | On Order | Reorder | Availability |
|-----------------------------------|-------------------|----------------|---------|---------------|---------|---------------|--------|-----------|----------|---------|--------------|
| Main Warehouse | SKD.857 | Active | 5 | 11 | 9 | 0 | 0 | 0 | 0 | 5 | Low Stock |
| Main Warehouse > Storage Room ... | SKD.857 | Active | 1 | 1 | 0 | 0 | 1 | 0 | 0 | 0 | In Stock |
| North Site > Tech Truck One | SKD.857 | Active | 3 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | In Stock |
| Main Warehouse > Storage Room ... | SKD.857 | Active | 3 | 6 | 0 | 0 | 0 | 0 | 0 | 0 | In Stock |
| Main Warehouse > Storage Room ... | SKD.857 | Active | 2 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | In Stock |

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Inventory Overview


- Increase the amount in the Location



Inventory : Inventory Overview

Filter the Grid Data Show Filters Set Threshold Bulk Add Bulk Transfer Order Purchase History Eqp.

| Description | UOM | On Hand | Total On Hand | Pending | Total Pending | Staged | Picked Up | On Order | Reorder | Availability |
|--------------------------------|------|---------|---------------|---------|---------------|--------|-----------|----------|---------|--------------|
| Avaya VOIP | Each | 11 | 11 | 0 | 0 | 0 | 0 | 0 | 5 | In Stock |
| Avaya VOIP | Each | 1 | 1 | 0 | 0 | 1 | 0 | 0 | | In Stock |
| Avaya VOIP | Each | 3 | 3 | 0 | 0 | 0 | 0 | 0 | | In Stock |
| Avaya VOIP | Each | 3 | 6 | 0 | 0 | 0 | 0 | 0 | | In Stock |
| Avaya VOIP | Each | 2 | 2 | 0 | 0 | 0 | 0 | 0 | | In Stock |
| OtterBox Defender iPhone 11... | | 1 | 10 | 0 | 0 | 0 | 0 | 0 | | In Stock |
| OtterBox Defender iPhone 11... | | 9 | 9 | 0 | 0 | 0 | 0 | 0 | | In Stock |
| OtterBox Defender iPhone 11... | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | In Stock |



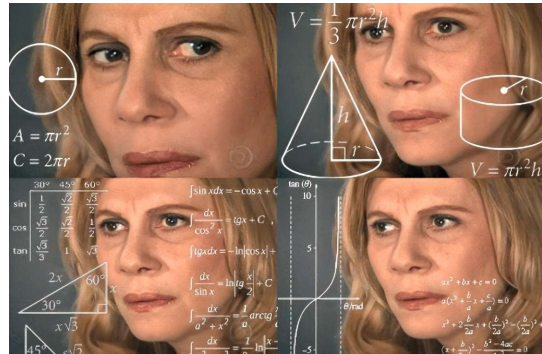
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GLA Replace is confusing

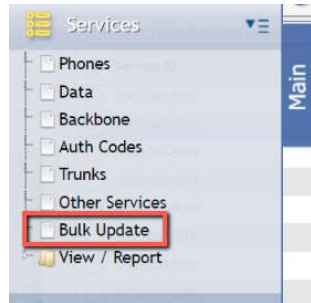
- What happens when you Replace a GLA?
- How are you doing it?
- On the Service, Equipment, or Service Desk Bulk Update?
- Or on all?



So what all is happening under the hood of a GLA Replace? How are you doing it? On the Service, Equipment, or Service Desk Bulk Updates? Or do you need to do it every where? Let's start answering that by doing a refresher on the Bulk Update. If you are following along on in your test environment...

Let's talk Bulk update

- Navigate to **Main > Services > Bulk Update**



You need to navigate to your Main > Services > Bulk Update.

Let's talk Bulk update

- Navigate to **Main > Services > Bulk Update**

Service Bulk Update Selected

Service Catalog:

Location:

Status: Available ▾

Service Host:

SLA:

Contact Owner:

Department Owner:

GLA Format: Banner ▾

GLA: Miss. GLA - 555.555.555517.55.2157

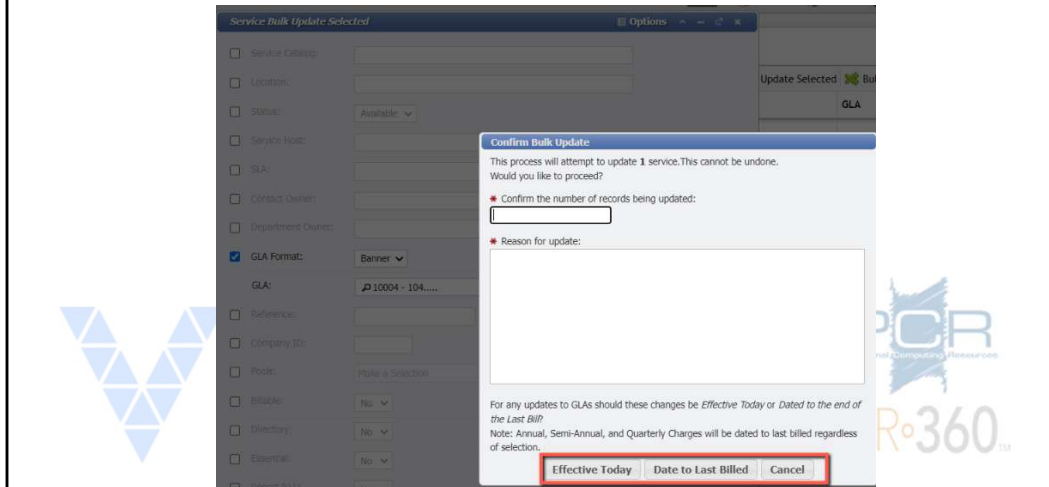
Reference:

Company ID:

First make sure you are in your Test environment. Select a GLA that makes sense for your organization. I am just going to use our test data example of the “5555”s. Save and close, and...

Let's talk Bulk update

- Old Charges are stopped on the old GLA yesterday



This is now giving us the Effective Date prompt from the Bulk Update form. This is where you tell PCR-360 what Date You want the Charges to Stop/Start. Any Charges that would normally Bill to the GLA that is being replaced are stopped based on which button you click here. Effective Today means the Charge is "Stopped" yesterday.

Let's talk Bulk update

- Be like Scottie!



You ever get a “I want it done yesterday” directive? Cause PCR-360 lets you do that, just don't tell the boss and you too can be a the miracle worker. The Start Date of the new Charge...

Let's talk Bulk update

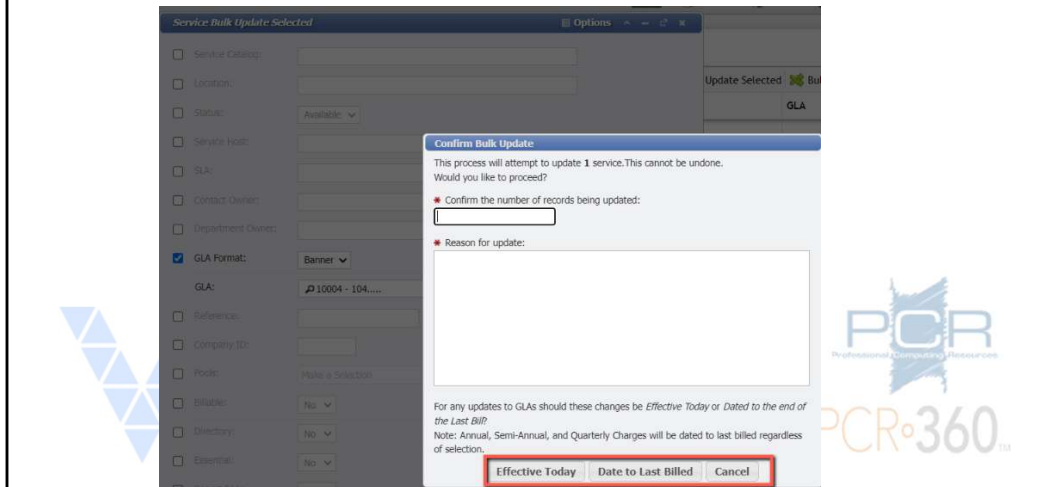
- Why is this updating more records than I selected?



Let's look at why

GLA Replace is confusing

- New Charges are started on the new GLA the today



Will be set to today. If instead you do a “Date to Last Billed” you will get the old Charge stopped on the last day of the previous Bill cycle. The New Charge will Start on the first day of the current Bill Cycle. So that’s all pretty straight forward for a single Service or Equipment record.

GLA Replace is confusing

- But how do I know it worked?
- Never fear, Estimate Billing to the rescue!



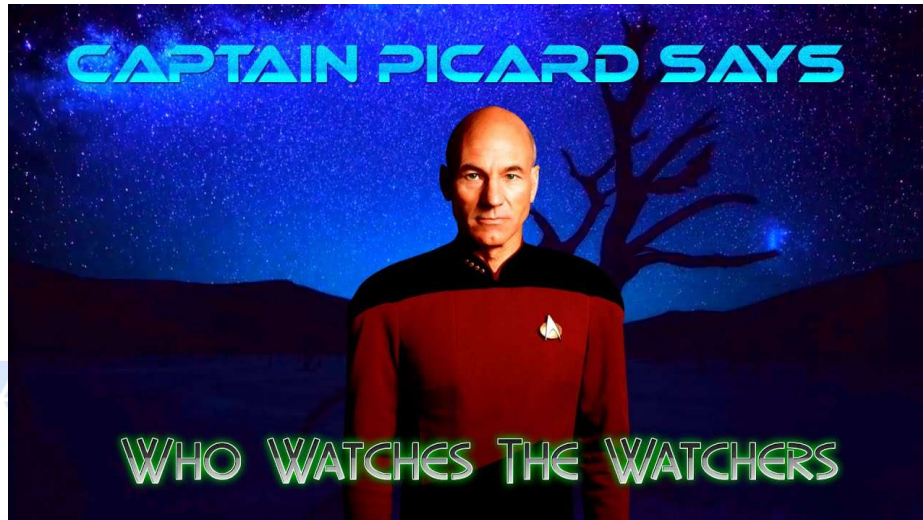
The GLA Replace does this same basic thing, except instead of a single Service getting a new GLA, all Services, Equipment, and pending Service Desk records with the old GLA will be replaced. Any Charges that would normally Bill to the GLA are Stopped. Each active Charge record where the GLA is replaced will get new Start Dates. The Stop Date is determined by the “Effective Date” prompt you will receive which is identical to the Bulk Update prompt except with the added option of making the old GLA “Inactive” so it cannot be used again.

GLA Replace: Did it work?



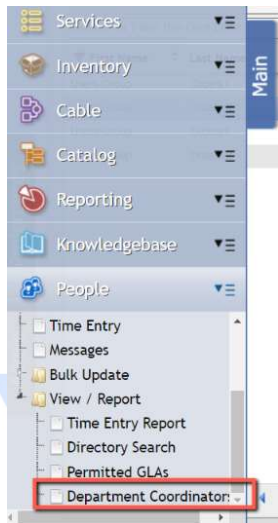
The Bulk Update History is a good starting point but won't tell you if you are Billing the new Charges on the right GLA for example. Let's run a quick example: First selecting the "5555s" GLA from when we ran that Bulk Update, I am going to click the Billing Estimate button. Then I want to see some detail by checking the Billing Transaction Details. Here we find our two Active Charges on the Service. The \$75.00 Billed for the full amount because that Charge is not prorated. The 38.34 is Prorated from a monthly Charge of \$50.. Because the start date is mid month, but our Billing cycle ends on the last day of the month. Now I can rest easy knowing the Billing is right.

Who coordinates the Coordinators?



So let's talk about the Coordinators now. There are a lot of moving parts to setting up and understanding Coordinators. You as admins have to watch to make sure everything is running smoothly for the people who watch their budgets tightly.

Coordinating Departments



- What is it?
 - Shows which Worker or Workers are assigned to a Department as a Coordinator
 - Navigate to **Main > People > View / Report > Department Coordinators** menu
- What can it teach me?
 - Lists all the Departments that a Worker Coordinates
 - Is the Worker merely assigned to the Department, or are they really a Coordinator?



So let's go over the tools in your belt to do so. First, let's look at the Department Coordinators grid. If you are following along navigate to Main > People > View / Report > Department Coordinators. This report shows you all the Workers that are set up as Coordinators for your Departments. Trying to see if a specific User has access to all the Departments they need to see? This report is your best friend, but it is one that gets forgotten a lot of the time. For instance, in PCR-360 jargon, how do we know the Worker is not just assigned to a Department?

Coordinated Departments

Member of a Department

Department Coordinator

The screenshot shows the 'Manage Contact' form with the 'Customer' tab selected. The 'Department' dropdown menu is highlighted with a red box, indicating the selection process. The form includes fields for First Name, Last Name, Users-Group, Orders II, Directory, Type, and various SLA settings.

The screenshot shows the 'Manage Departmental Hierarchy' grid with the 'Coordinators' tab selected. The grid lists coordinators and their associated departments. Two rows are highlighted with red boxes, showing a worker acting as a coordinator for two different departments.

| List Name | First Name | Billing Group | Types | Department | Primary |
|-----------|-------------|---------------|------------------------------|----------------|-----------|
| Fry | Philip | Workers | Coordinator, Customer, Guest | Administration | phy@pcr |
| Glover | Bob | Workers | Coordinator, Customer, Guest | Administration | |
| Orders I | Users-Group | | Coordinator, Customer, User | | ug01@pcr |
| Orders II | Users-Group | | Coordinator, Customer, User | | ug02@pcr |
| Stetler | Steve | | Coordinator, Customer, Guest | | stevs@pcr |

So on the left we have the Department assignment picker. This places the Worker in that Department according to the Org Chart. However, on the right we can see this same Worker is responsible for the Budgets of two Departments as a Coordinator. This is the data that is loaded in the Department Coordinators grid, from every Department where the Worker is a Coordinator.

Some gotchas!

- The Worker type must first be a “Coordinator”:

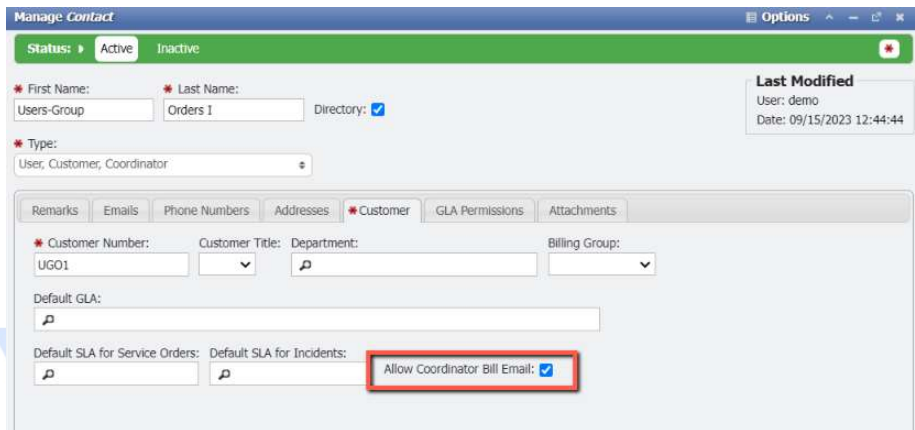
The screenshot shows the 'Manage Contact' form with the following details:

- Status: Active (selected), Inactive
- First Name: Users-Group
- Last Name: Orders 1
- Directory:
- Last Modified: User: demo, Date: 09/15/2023 12:44:44
- Type: User, Custom, Coordinator (highlighted with a red box)
- Customer Number: UGO1
- Customer Title: [empty]
- Department: [empty]
- Billing Group: [empty]
- Default GLA: [empty]
- Default SLA for Service Orders: [empty]
- Default SLA for Incidents: [empty]
- Allow Coordinator Bill Email:

There are a few “gotchas” when dealing with Coordinators. The Worker Type is important here. Without having the Coordinator checkbox set the Worker will not be able to be seen in the Coordinators picker on the Department Hierarchy form.

Some gotchas!

- Allow Coordinator Bill Email checkbox:



The screenshot shows a web application window titled "Manage Contact" with a status bar indicating "Active". The form contains several fields: "First Name" (Users-Group), "Last Name" (Orders I), "Directory" (checked), "Type" (User, Customer, Coordinator), "Customer Number" (UG01), "Customer Title", "Department", "Billing Group", "Default GLA", "Default SLA for Service Orders", and "Default SLA for Incidents". A red box highlights the "Allow Coordinator Bill Email" checkbox, which is checked. A "Last Modified" box shows "User: demo" and "Date: 09/15/2023 12:44:44".

Do you want the Coordinator to have access to review the Bill or GLAs but they specifically requested no more monthly emails? Just turn the Allow Coordinator Bill Emails checkbox off and you are good to go.

Some gotchas!

On the Department

Manage Departmental Hierarchy

Status: Active Inactive

Parent: None

Code: Administration Name: Administration Billing Group: Administration Directory:

Default GLA: Default SLA: Default Incident SLA:

Remarks GLA Permissions Emails Phone Numbers Addresses Coordinators Attachments

GLA

| |
|----------------|
| 10001 - 101... |
| 10002 - 102... |
| 10003 - 103... |

On the Worker

Manage Contact

Status: Active Inactive

First Name: Last Name: Users-Group: Orders 1 Directory: Last Modified: User: demo Date: 09/15/2023 12:44:44

Manage Contact

Status: Active Inactive

First Name: Last Name: Users-Group: Orders 1 Directory: Last Modified: User: demo Date: 09/08/2024 08:04:35

Type: User, Customer, Coordinator

Remarks Emails Phone Numbers Addresses Customer GLA Permissions Attachments

| GLA | Description |
|--------|----------------|
| 103... | Physical Plant |

How GLA Permissions for Coordinators work is important to know. GLA Permissions flow from the less specific data to the more specific data. This follows our design philosophy of always moving from less specific data to more specific data when applying rules to data sets. What this means in practice is that the GLAs on the Department Permissions tab will enforce the GLA Permissions, unless the Worker has additional Permissions. Here we can see that the Department has three GLAs that are assigned to it for Coordinators to access. Those Permissions flow down to the Worker level and are automatically inherited by the Worker. However, our Worker only has one Permissioned GLA.

Some gotchas!

- This means Worker level GLA Permissions are exclusive to that Worker and do not apply to the Department as a whole.

The screenshot shows a 'Manage Contact' interface. At the top, there's a status bar with 'Active' and 'Inactive' options. Below that, there are fields for 'First Name', 'Last Name', 'Users-Group', 'Orders I', and 'Directory'. A 'Type' dropdown menu is set to 'User, Customer, Coordinator'. On the right, a 'Last Modified' box shows 'User: demo' and 'Date: 09/08/2024 08:10:36'. The main section has tabs for 'Remarks', 'Emails', 'Phone Numbers', 'Addresses', 'Customer', 'GLA Permissions', and 'Attachments'. The 'GLA Permissions' tab is active, showing a table with two rows: '103' with description 'Physical Plant' and '110' with description 'Admin'. A red box highlights these two rows. Above the table are buttons for 'Add', 'Delete Selected', 'Inherited Permissions', 'Permit None', 'Report', and 'Perspectives'.

| GLA | Description |
|-----------|----------------|
| 103 | Physical Plant |
| 110 | Admin |

GLA Permissions at the Worker level will override the Permissions from the Department Hierarchy level. Even though this Worker is a member of our example Administration Department, which normally would be getting GLA Permissions for 101, 102, and 103 from the last example, here on the Worker record they only have access to 103, and 110. This overrides the allowed Permissions on the Department level and prevents the Worker from being able to see the 101 or 102 GLAs. No other Workers in the Administration Department will have access to 110 because that is exclusive to this Worker. That more specific data will limit the Worker to only have access to that one GLA, this is not an additive process.

Lightning Round

- Imports cannot DELETE information from the database by design. Protects against large scale data loss attacks.



We restrict access to functions that can destroy large amounts of the Data. This means the Import cannot delete information that is already in the database. Sometimes child data can be cleared out or overwritten, but the record itself that is being Imported cannot. An example would actually be the GLA Permissions.

Lightning Round

- For the same reason, the API cannot DELETE



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The same is true of API calls.

Services Links

- Linking directly to a Service record via a URL
- Grid links for services using the URL to make grid-specific links



Service Grid Links

- </service/index/grid/PHONE/~catalog/1/>
 - Open a Phone Services grid that only displays Service Catalogs matching RECID 2



Service Form Links

- `/service/link/RECID/1234`
 - Open a Service Grid and the form with RECID 123.
- `/openForm/Application_Form_Service_Service/recid/123`
 - Open Service with RECID 123 on the Service form
 - This will open the service form on the Homepage if the entire URL included in the link.
 - But if it is a relative link from a Bookmark it will open the Service form on the current page



PCR³⁶⁰

Multi-Locations Vs Extensions

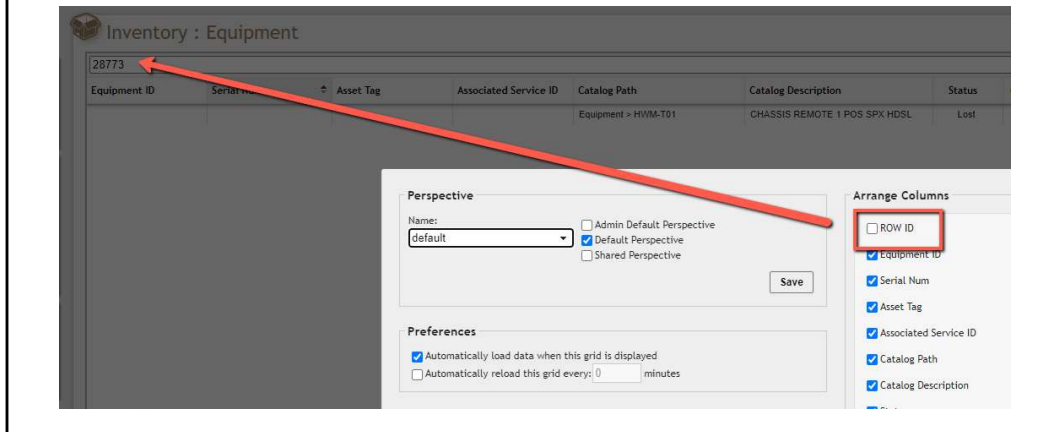
- A single Service can be in multiple Locations
- That same Service can have extension Services that are a separate thing.



Extension Services are just a different Service Catalog format. ?e

Quickly search by RECID

- RECID is always in the Grid, even if you can't see it:



RECID is always on the grid even if it is hidden. So you can just copy it into the grid and still only get records matching that recid.

Thanks for your attention

- Additional questions?
- Feel free to send to help@pcr.com anytime.



Now you all have the tools to be a miracle worker too. Questions?