2024 Tips and Tricks

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VALSOFT

PCR Professional Computing Resources

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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.

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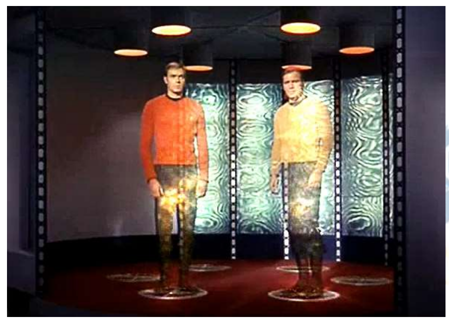
- Inventory Overview
- GLA Replace / Bulk Update
- Coordinating Departments
- Lightning Round



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”.

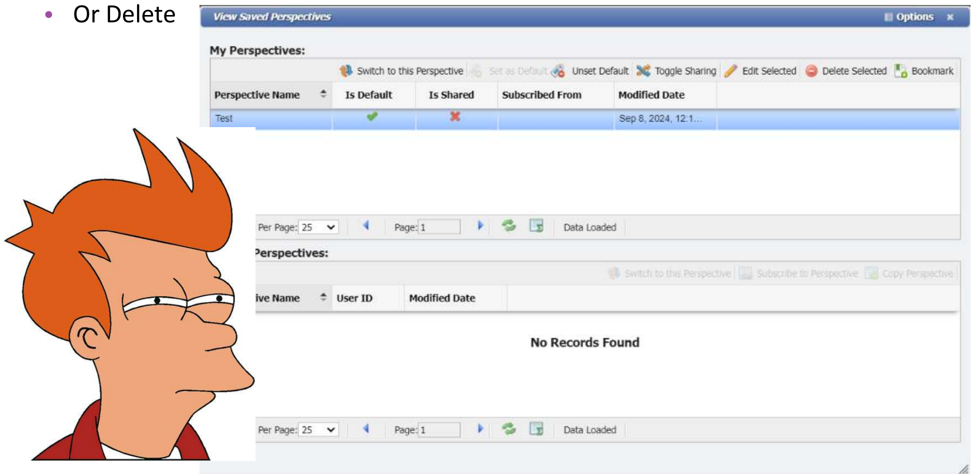
Form Perspectives

- 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

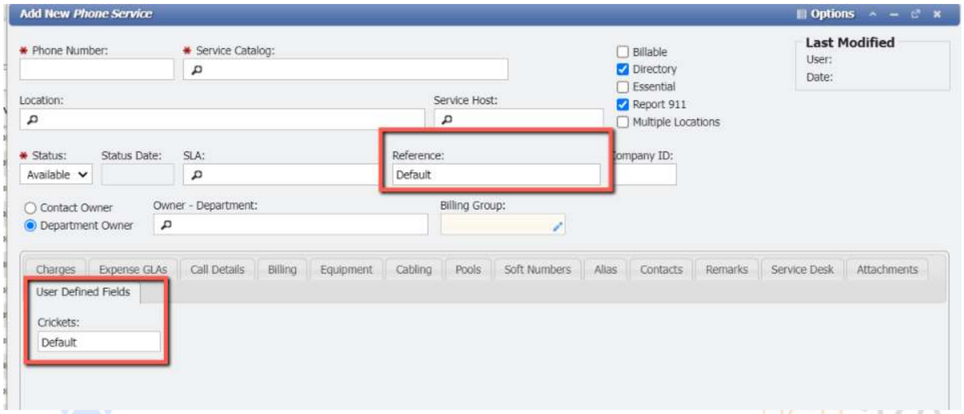
- Unset as the Default
- Or Delete



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



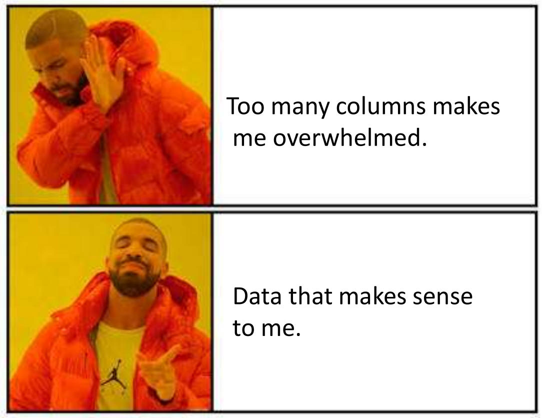
We can now use this either as a Default, or Save the Perspective for later use. Maybe we don't want to always use these values, then we can just use it like we do with Grid Perspectives.

Form Perspectives

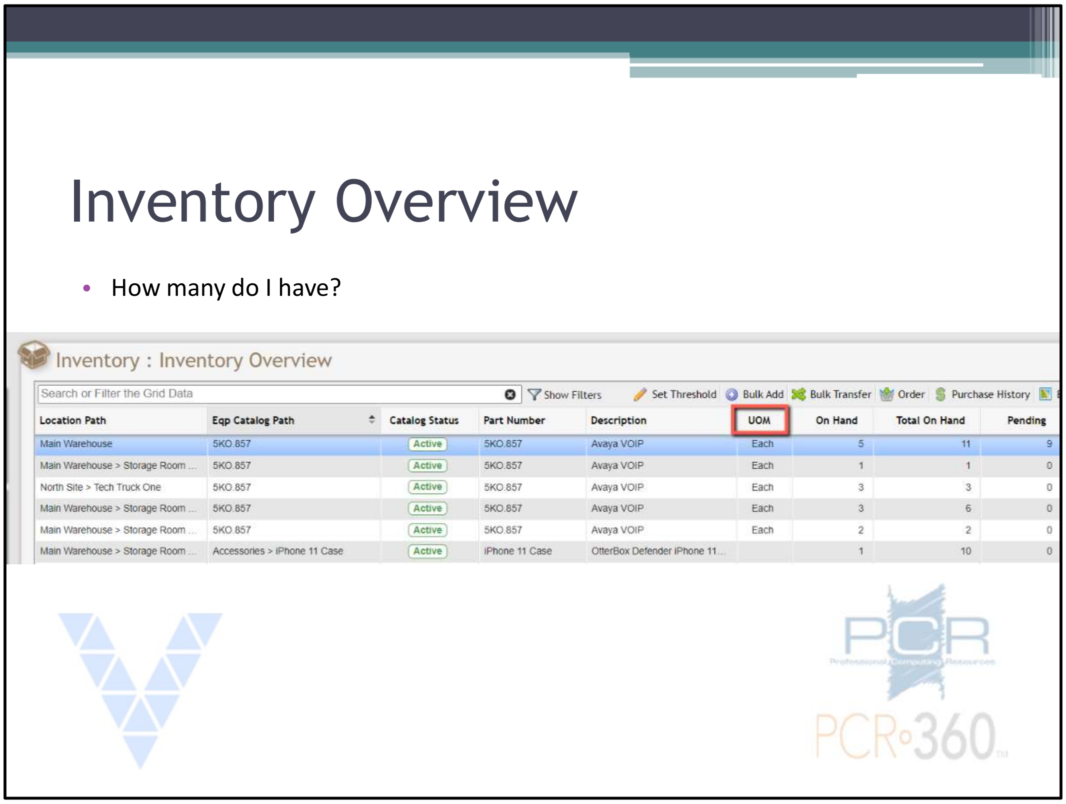
- Let’s see an example

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?



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.

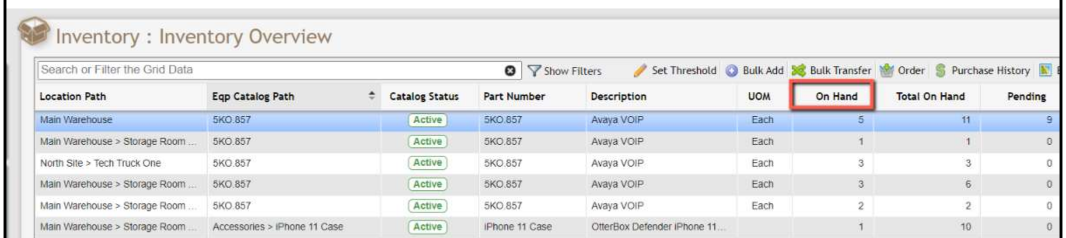


Location Path	Eqp Catalog Path	Catalog Status	Part Number	Description	UOM	On Hand	Total On Hand	Pending
Main Warehouse	5KO.857	Active	5KO.857	Avaya VOIP	Each	5	11	9
Main Warehouse > Storage Room ...	5KO.857	Active	5KO.857	Avaya VOIP	Each	1	1	0
North Site > Tech Truck One	5KO.857	Active	5KO.857	Avaya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

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 defendant 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
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Main Warehouse > Storage Room ...	5KO.857	Active	5KO.857	Avaya VOIP	Each	1	1	0
North Site > Tech Truck One	5KO.857	Active	5KO.857	Avaya VOIP	Each	3	3	0
Main Warehouse > Storage Room ...	5KO.857	Active	5KO.857	Avaya VOIP	Each	3	6	0
Main Warehouse > Storage Room ...	5KO.857	Active	5KO.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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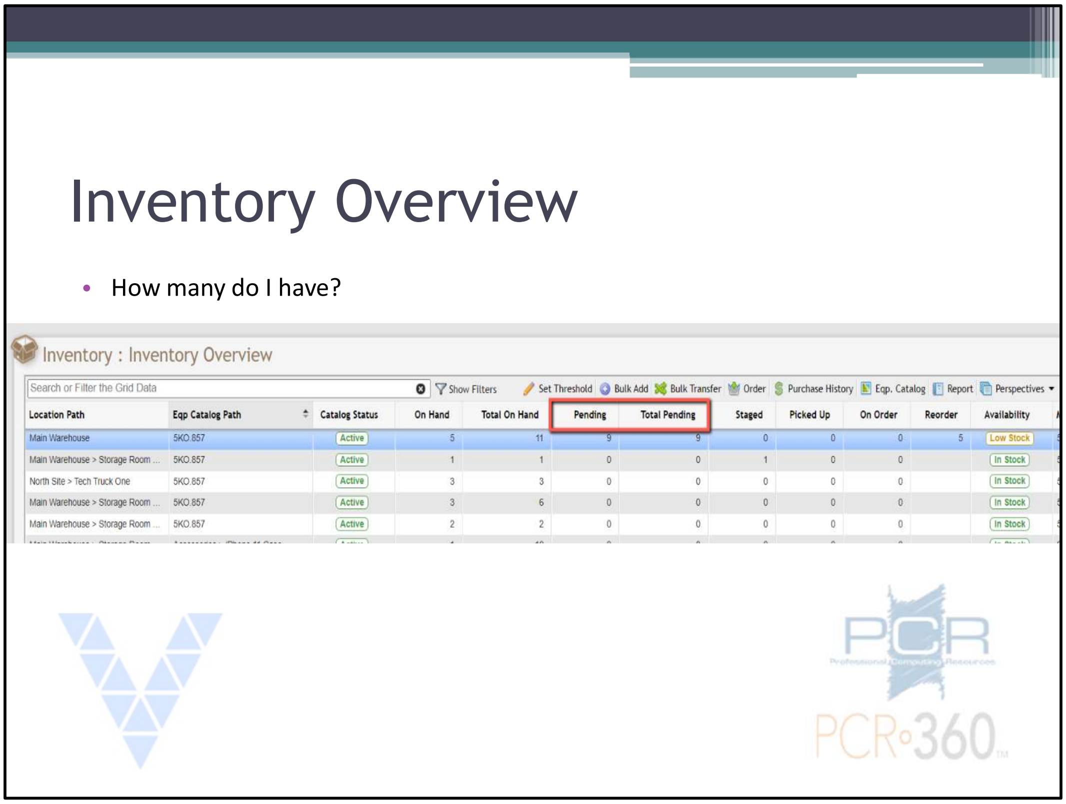

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Inventory Overview

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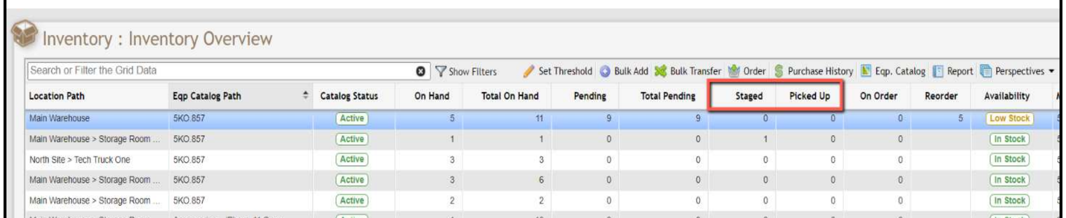

Inventory : Inventory Overview

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	9	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

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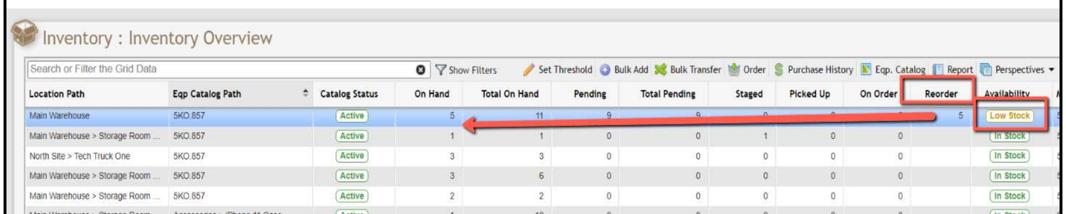

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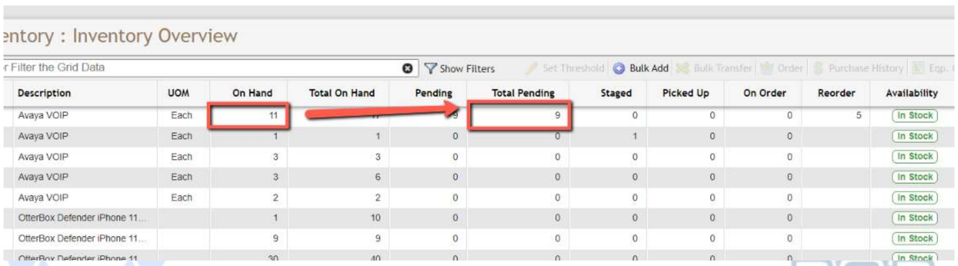
Inventory Overview

- Increase the amount in the Location



Description	UOM	On Hand	Total On Hand	Pending	Total Pending	Staged	Picked Up	On Order	Reorder	Availability
Avaya VOIP	Each	11	[illegible]	9	9	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

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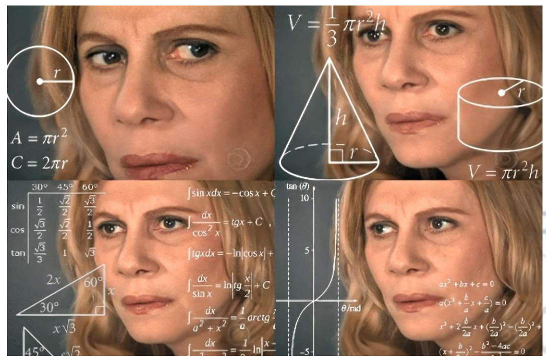
GLA Replace is confusing

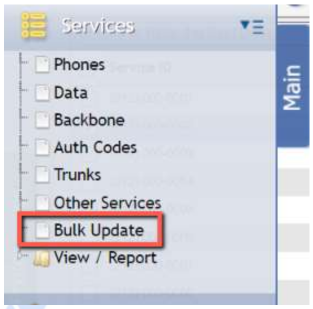
- What happens when you Replace a GLA?
- How are you doing it?
- On the Service, Equipment, or Service Desk Bulk Update?
- Or on all?



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

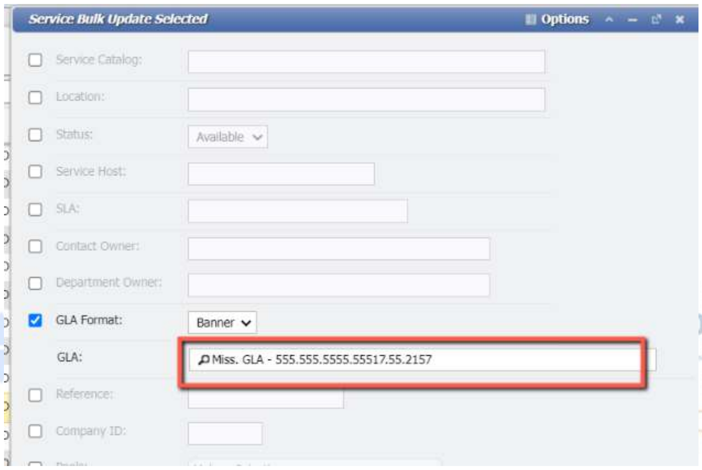
- Navigate to Main > Services > Bulk Update



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

Let’s talk Bulk update

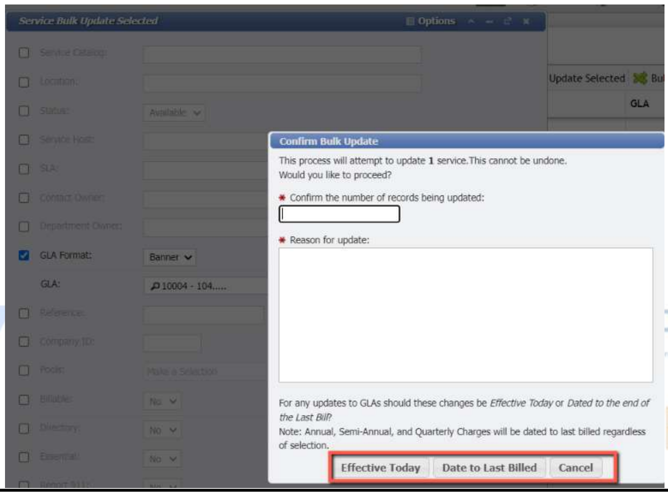
- Navigate to Main > Services > Bulk Update



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…

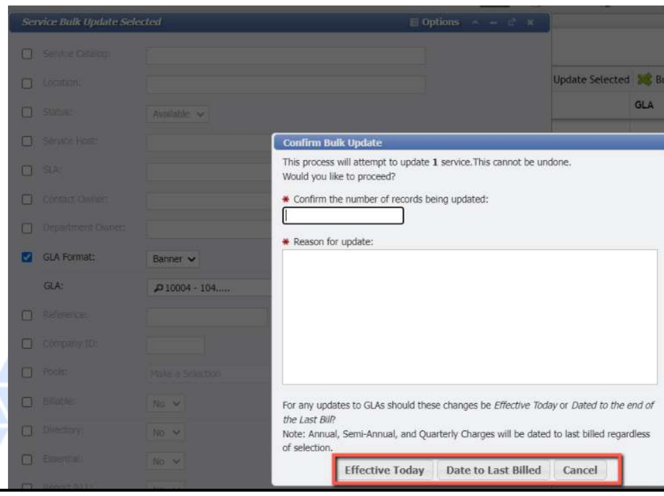
Let’s talk Bulk update

- Why is this updating more records than I selected?

Let’s look at why

GLA Replace is confusing

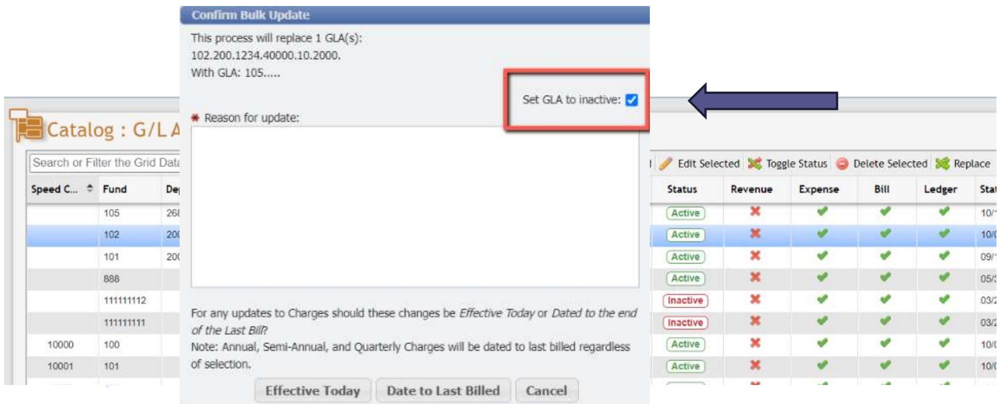
- New Charges are started on the new GLA the today



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!



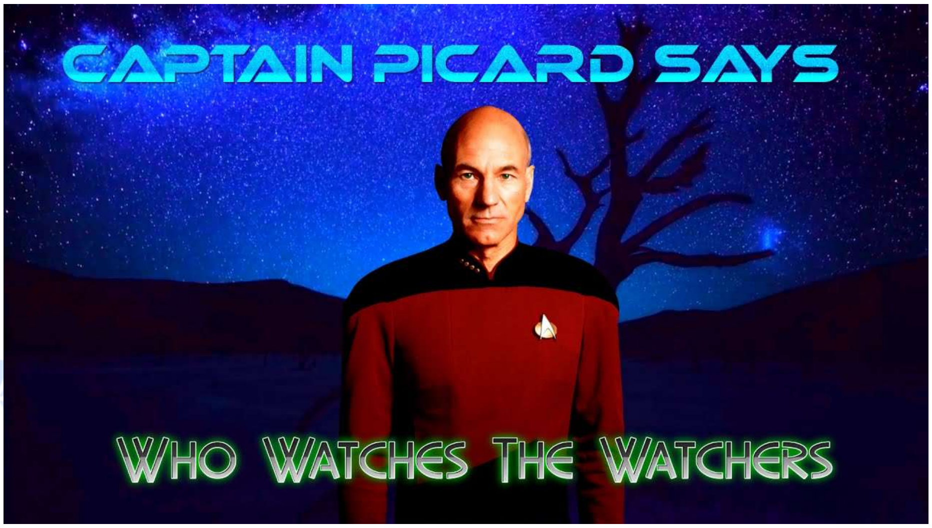
The GLA Replace does this same basic thing, except instead of a single Service getting a new GLA, all Services, Equipment, and pending Service Desk records with the old GLA will be replaced. Any Charges that would normally Bill to the GLA are Stopped. Each active Charge record where the GLA is replaced 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?

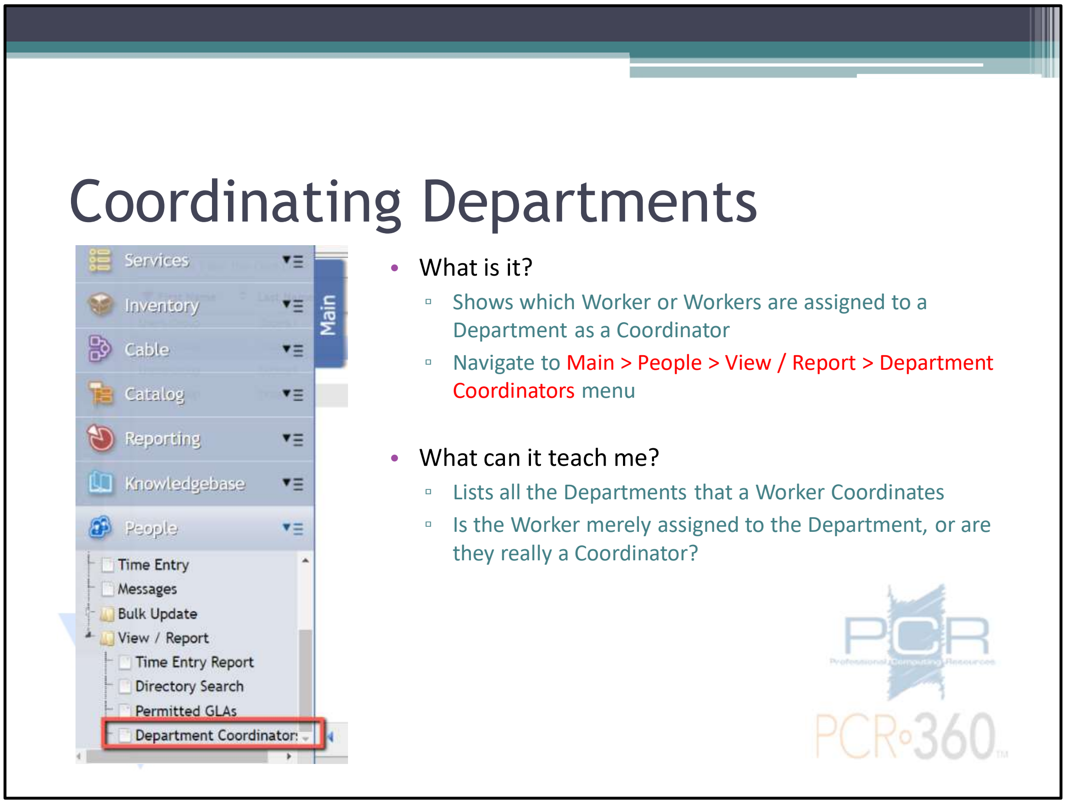
- Bu
- Bil

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.

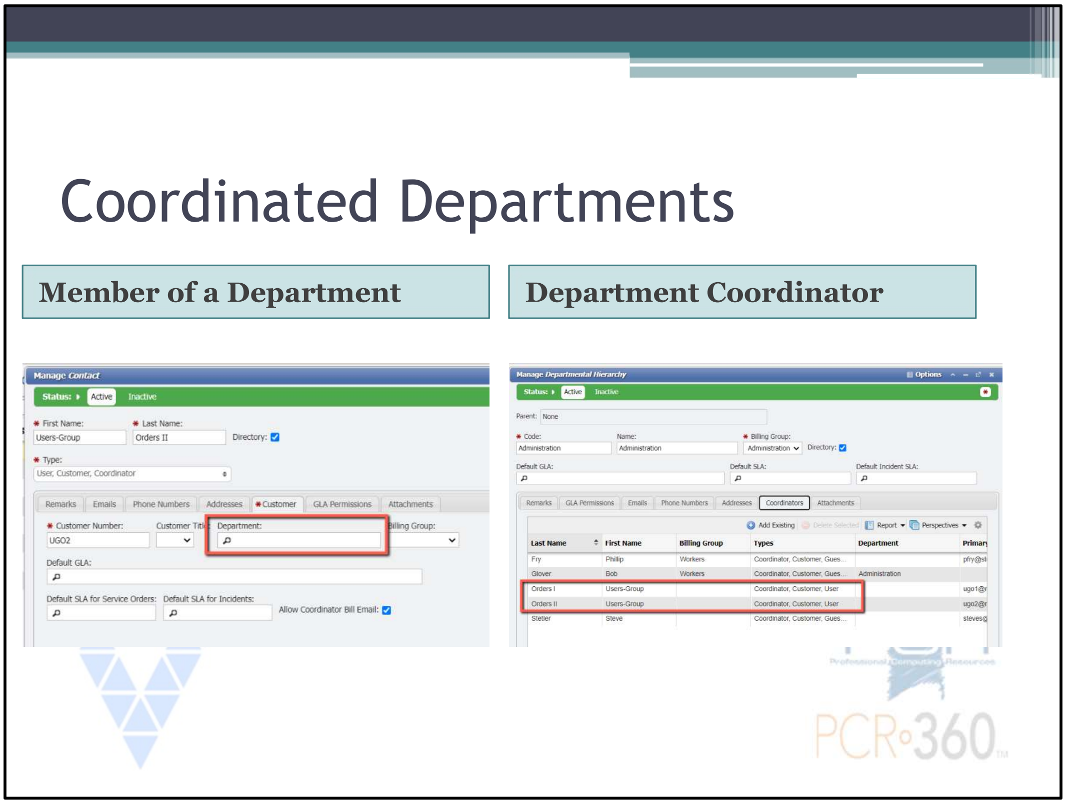
Who coordinates the Coordinators?



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.



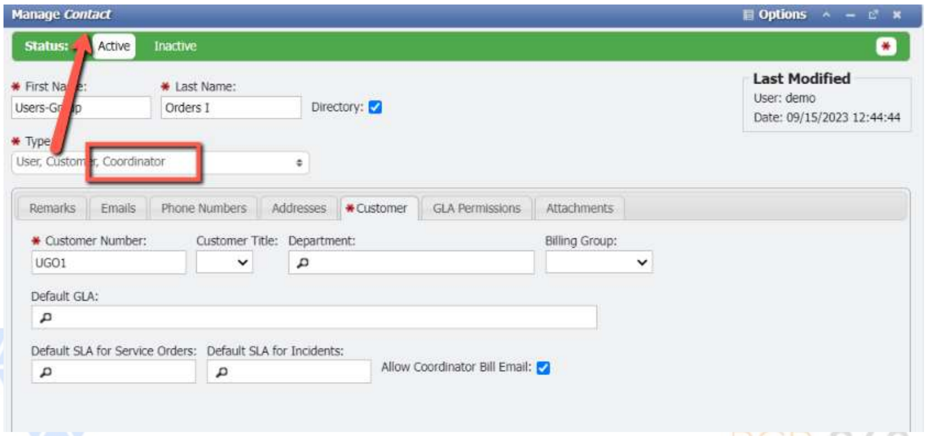
So let's go over the tools in your belt to do so. First, let's look at the Department Coordinators grid. If you are following along navigate to Main > People > View / Report > Department Coordinators. This report shows you all the Workers that are set up as Coordinators for your Departments. Trying to 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?



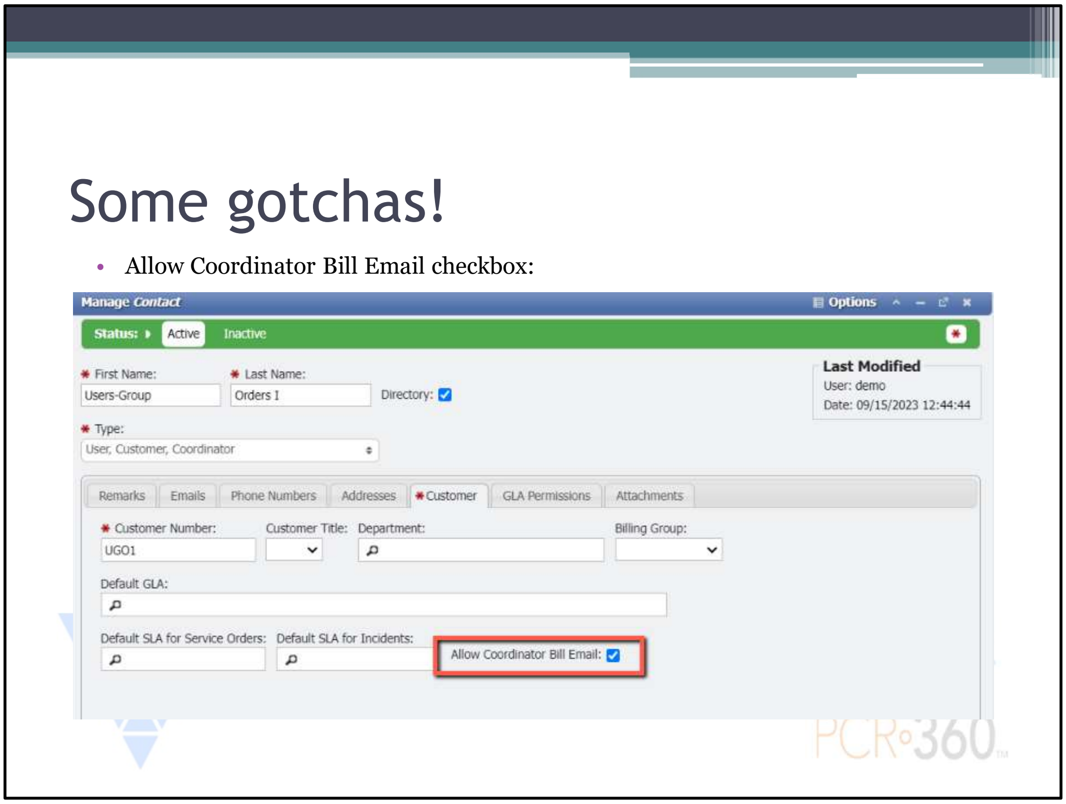
So on the left we have the Department assignment picker. This places the Worker in that Department according to the Org Chart. However, on the right we can see this same Worker is responsible for the Budgets of two Departments as a Coordinator. This is the data that is loaded in the Department Coordinators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

Some gotchas!

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



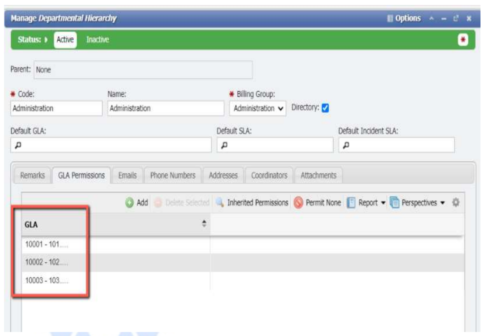
There are a few “gotchas” when dealing with Coordinators. The Worker Type is important here. Without having the Coordinator checkbox set the Worker will not be able to seen in the Coordinators picker on the Department Hierarchy form.



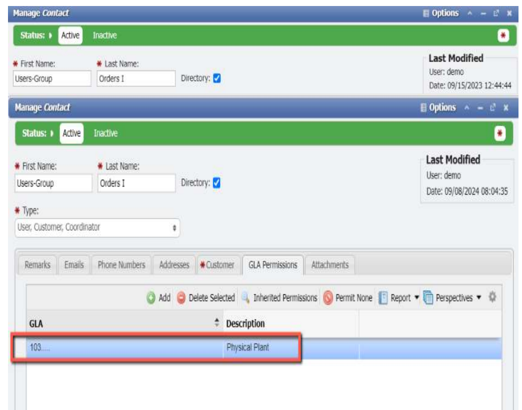
Do you want the Coordinator to have access to review the Bill or GLAs but they specifically requested no more monthly emails? Just turn the Allow Coordinator Bill Emails checkbox off and you are good to go.

Some gotchas!

On the Department



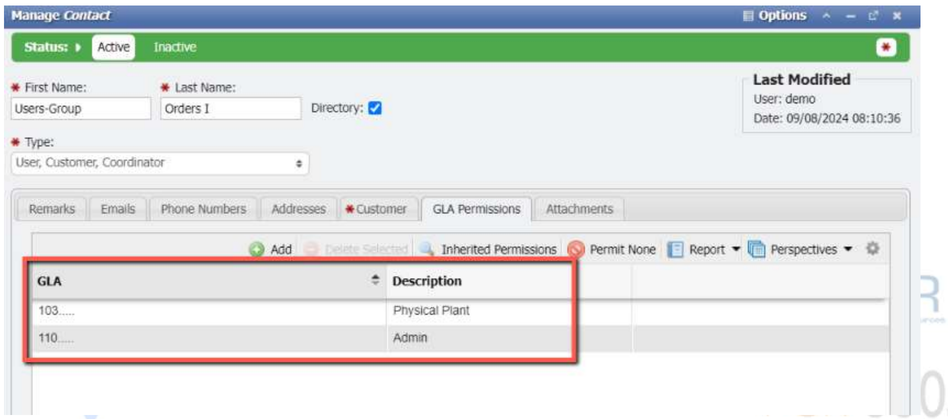
On the Worker



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.



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.

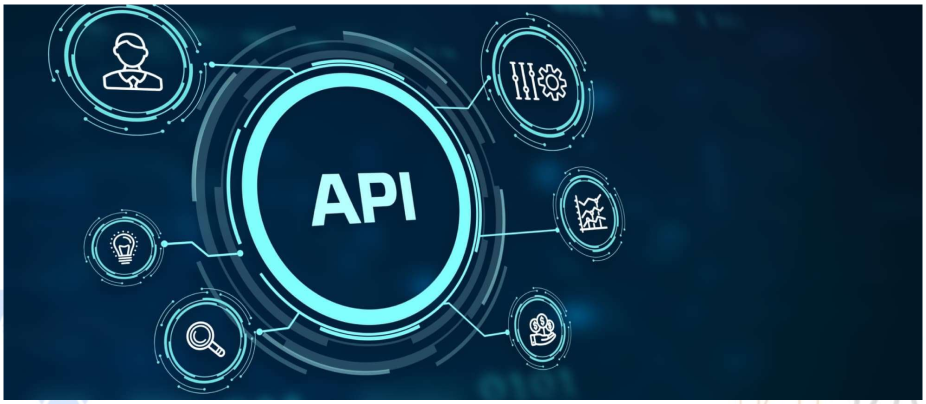
Lightning Round

- 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



PCR-360

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

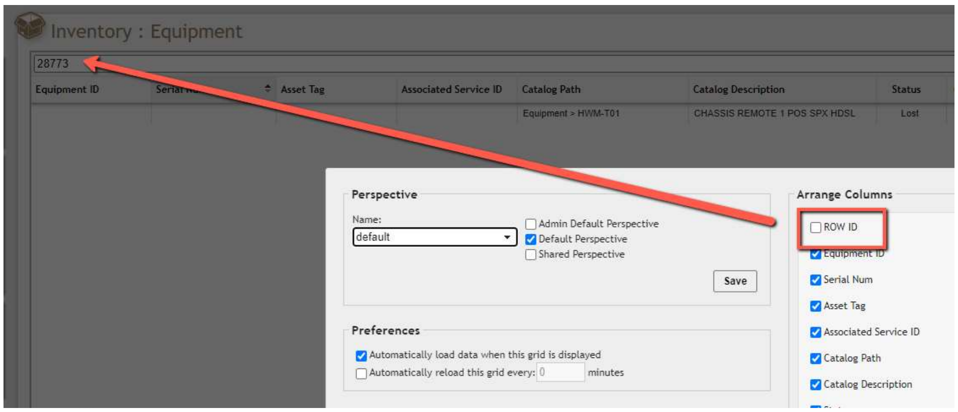
Multi-Locations Vs Extensions

- 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?