Support/Manager

User Manual and Administration Guide

We pride ourselves in producing good stuff. If you have any questions, problems, or suggestions regarding this product, please contact us at:

MBA

810 S Cincinnati, Suite 105
Tulsa, OK 74119
(918) 587-1500
Fax (918) 587-1526
www.mbainc.com sales@mbainc.com

Chapter 1 – About Support / Manager

Overview

Need help keeping track of all those requests for changes and corrections? Support/Manager provides a means of collecting, assigning, and managing them at your fingertips.

Support/Manager is a fully integrated tool for your HELP desk or system administrator. It is designed to facilitate logging, tracking, and reporting of outstanding tasks. It provides instant online capture of reported problems or requests; the ability to identify probable causes; and a base of information with which to perform a global review of outstanding problems and conduct follow-up analysis of historical problem trends by nature of problem, application, machine, release, or other criteria.

Support/Manager offers F-key access to second-level system message text, with provisions for user-specified message files. Standard output reports can be selected from the Support/Manager reports menu, or defined by the user through query selections. Problems can be viewed online, and dynamically sequenced through various user-specified options. A system-provided morning report shows all problems/requests added or completed since the last reporting.

Key Features

Key features include:

- Help desk support call management, including the ability to quickly open new problems or requests, or easily locate and open existing ones.
- Streamlined entry of problems or requests with the flexibility of specifying user-defined fields and user-defined field names.
- Multiple input display formats to choose from.
- Dynamic keyword search on virtually any field.
- Online notification to the assigned analyst and/or system administrator.
- Provisions for dynamic specification of multiple user-defined fields.
- Manual or automatic problem escalation through the AS/400 job scheduler or any third party job scheduling system.
- Tracking of customer problems and resolutions with unlimited lines of text.
- Table provisions for entering and displaying products used by the contact and other pertinent product information such as maintenance items, model numbers, release numbers, and so on.
- Standard and customized report generation capabilities.
- User-defined and customized tables for easy storage, edit checking, and retrieval of vital information, such as contact persons, company locations, product types, and many others.
- User-specified security levels.
- Optional interface to MBA's Page/Manager and Call/Manager systems for automatic paging or calling notification.

How Support / Manager Works with Tables

Support/Manager is a table-based system. It allows you to set up a company or companies and establish tables within those companies.   A table allows you to group different types of information together for use in editing or keyword searches. Support/Manager tables are predefined with table names and corresponding display headings. If you choose, you may change these names and headings to those that you prefer through a simple online F-key operation from any display.

Tables can be identified (pointed to) for use by a company in three ways:

- Through specification of a default validation company in the company table
- By copying existing tables
- By development of your own tables from scratch.

Each of the tables that you add for a company uses existing security from one of two places:

- If you are copying tables from a pre-existing company (for example, company 999), Support/Manager uses the security from that company.
- If you are adding a table from "scratch" (that is, not copying from an existing company), Support/Manager uses the security from company 000. Company 000 has "*PUBLIC" set up for "*ALL AUTHORITY" for the functions.

As the system is processing a function (add, change, delete, etc) for the tables, Support/Manager checks user authority for tables in the following order.

- It first checks the user profile set up on the operating system. If the user has SECADM, Security Officer, or Special Authority to objects, then Support/Manager does not check further.
- If the user does not have the necessary system-level authority, Support/Manager checks its own authority file for the user. If the user is set up in the function he or she is trying to access, then Support/Manager does not check further.
- If the user does is not set up in the function he or she is trying to access, Support/Manager checks for *PUBLIC, and uses the *PUBLIC authority setting, if *PUBLIC is set up.

If none of these authorities exist, then Support/Manager does not allow the user to access the function.

The following illustration shows how tables are used within companies.

```
                            Work with Table Options
Company number . . . . . . . . .   999         1-999, F4 for list
Company name . . . . . . . . . :   Practice Co.
Validation company . . . . . . :   999
Position to  . . . . . . . . . .               Starting sequence
Select Sequence Number . . . . .               Sequence number

Type options, Press Enter.
  1=Select  2=Change  4=Remove  5=Display

Opt Seq   Description                                           Type

    010   Work with companies                                   SPM
    020   Work with operators                                   SPM
    030   Work with analysts                                    SPM
    040   Work with product types                               SPM
    050   Work with coordinators                                SPM
    060   Work with entry types                                 SPM
    070   Work with entry indicators                            SPM
```

Support/Manager comes preloaded with a “Practice Company” (Company 999). This company contains a complete set of predefined tables. You can use these tables to learn Support/Manager or you can also modify them for use as your own.

How the Entry Function Uses Tables

When a support call entry is logged, Support/Manager pulls information from the tables based on the information selected by the person logging the entry. This information is made a part of the entry's record.

The person logging the entry can use the information in the tables to assign the entry to an analyst, associate the entry with a particular product, assign the entry to a supervisor or coordinator, and provide other information about the entry.

Each table utilizes a code and a corresponding description for each table entry. An example of this is the analyst table.

Code	Description
DLT	Donna L. Thompson
JWM	Jim Moody
OR	
SMITH	John Smith
DAVIS	Cindy Davis

You should note that either the code (Initials) or description (Name) can be entered in the input field. Either will be considered valid if contained in the table.

NOTE: If description information is missing in the table and a table selection is made for that entry, the code will be used in the input field.

Why Use Tables?

When logging an entry, it may be tempting to simply type information into entry fields instead of using the information set up in the company tables. However, this is not a good practice.

One major feature of Support/Manager is its ability to search all entries based on certain common criteria, such as finding all entries assigned to a certain analyst, finding all entries with a certain status code, or finding all entries logged on a certain date. Using the tables ensures that the criteria you search on is established and consistent.

Overriding Table Information

When an entry is added or changed, the person logging the entry can display the list of items available for that table (for example, a list of analysts, a list of status codes, and so on). If the table is set up such that table information can be overridden, the person logging the entry can override the established information by typing in new information that is not contained in the table.

How tables are used by Support/Manager, and how the user is required to enter information from a table is determined by how you set up the Table Editing Specifiers when setting up your company information. The Table Editing Specifiers are located on the third screen of the Change Company display.

```
                          Change Product

Type choices, Press Enter.

Assigned to . . . . . . . . . .   Y    Y, N         N     Y, N
Coordinator . . . . . . . . . .   Y    Y, N         N     Y, N
Location . . . . . . . . . . . .  Y    Y, N         N     Y, N
Application . . . . . . . . . .   Y    Y, N         N     Y, N
Indicator . . . . . . . . . . .   Y    Y, N         N     Y, N
Entry type . . . . . . . . . . .  Y    Y, N         N     Y, N
Cause . . . . . . . . . . . . .   Y    Y, N         N     Y, N
Resolution level . . . . . . . .  Y    Y, N         N     Y, N
Manager name . . . . . . . . . .  Y    Y, N         N     Y, N
Clerk name . . . . . . . . . . .  Y    Y, N         N     Y, N
Secretary name . . . . . . . . .  Y    Y, N         N     Y, N
```

The following conditions are dictated by the Table Editing Specifiers settings.

- If you entered N beside the Mandatory Entry column, the user is not required to type information in the associated field (Contact name, Operator, Product type, and so on) on the entry screen. A Y indicates that the user is required to type information in the field.
- If you entered Y in the Allow Override column of the table editing specifiers, the user can override any previously established table information for a field. The user is allowed to enter any name or code description in the associated field (Contact name, Operator, Product type, and so on) on the entry screen. An N indicates that the user cannot override established table information.

The two specifiers work in combination to determine the way in which the user can enter information in a field. The following examples clarify how the Table Editing Specifiers dictate how users type in information when adding or editing an entry.

Sample Field	Allow Override Setting	Mandatory Entry Setting	Resulting Entry Screen Requirements
Contact	Y	N	The user is not required to enter a Contact name, but if he does, it can be anything (i.e., table information is not used).
Contact	Y	Y	The user is required to enter data in the Contact field, and he can enter anything (i.e., table information is not used).
Contact	N	Y	The user is required to enter a Contact name, and it must be a valid Contact name from the Contact table.
Contact	N	N	The user is not required to enter data in the Contact field, but if he does, it must be a valid

			name from the Contact table.

For example, assume the contact name "John Smith" is not set up in the Contact Name table, and the person logging the entry wants to specify the contact as "John Smith." Until "John Smith" is set up in the Contact Name table, two situations will continue to occur:

- Each time the entry containing "John Smith" is changed, the Contact field will be highlighted.
- The user will receive a message that the contact is invalid and either
    - can be overridden by pressing Enter, or
    - is a mandatory field and must be entered accurately.

Support/ Manager Tips and Techniques

The following questions and answers are designed to help you learn some of the more helpful features of Support/Manager.

How do I Customize Support/ Manager Displays?

To customize your displays with your own field names and table headings, you must be authorized to do so by your system administrator. It is recommended that this feature be used only by the person(s) responsible for installing and maintaining Support/Manager in order to assure data input consistency by Help desk personnel. Once you have been authorized, you can use the following customizing features.

How do I Change Field Names?

1. Position the cursor on the field you want to change. This can be done from any display where the field name exists.
2. Press F7 (Change Text). A pop-up window is displayed, requesting the new name.
3. Type in the new name and press F2. The field name is now changed on the originating display and all other displays that contain that field name.

How do I Change the Corresponding Table Name and Screen Heading?

1. From the Support/Manager main menu, type 2 (Table Management) in the command line and Press Enter.
2. From the Work with Tables display, select Option 1 (Work with table options). A list of table headings is displayed.
3. Type 2 next to the table heading you want to change and Press Enter. The Change Table Option display is shown.
4. Type in a new description for the table, and press F3. The list of table headings is displayed again, with the new description shown in the Description column of the list.
5. Type a 1 or a 5 next to the same table entry. The table itself is displayed.
6. Using the arrow keys, position the cursor on the header of this display and press F7 (Change text). A pop-up window is displayed where you can change the header text.
7. Type in the new header and press F2. The header for this display is now changed.
8. Press F3 to return to the Work with Table Options display.

How do I Change Titles on the "Work with . . ." Entry Displays?

1. From the Support/Manager main menu, type 1 (Entry Management) in the command line and Press Enter.
2. From the Entry Management display, select Option 1 (Work with entry options). A list of entry headings is displayed.

3. Type 2 next to the entry heading you want to change and Press Enter. The Change Entry Option display is shown.
4. Type in a new description for the entry, and press F3. The list of entry headings is displayed again, with the new description shown in the Description column of the list.
5. Type a 1 or a 5 next to the same entry name. The entry is displayed.
6. Using the arrow keys, position the cursor on the header of this display and press F7 (Change text). A pop-up window is displayed where you can change the header text.
7. Type in the new header and press F2. The header for this display is now changed.
8. Press F3 to return to the Work with Entry Options display.

How do I Copy a Table?

1. From the Support/Manager main menu, type 2 (Table Management) in the command line and Press Enter.
2. From the Table Management display, select Option 1 (Work with table options). A list of table headings is displayed.
3. Type 1 next to the table heading you want to select and Press Enter. The corresponding table display is shown.
4. Type 3 next to the table you want to copy and Press Enter. The Copy display is shown.
5. Type in the name of the new table and Press Enter.
6. The "Work with . . ." table display is shown again, with a confirmation message shown at the bottom of the screen.

How do I Avoid Creating Tables from Scratch?

If you wish, you can use the "Practice Company" tables delivered with Support/Manager as a basis for your own tables. You do this by specifying "999" as the Validation Table in your Company Table. Then table entries can be customized to your environment. Once you have established valid tables for your company, other companies can specify this same group of tables as validation tables.

How do I Determine the Original Name of a Changed Field?

Position the cursor on the field whose original name you want to trace and press F7 (Change text). A pop-up window is displayed, showing the originating field or table name.

NOTE: It may be necessary to know this information when communicating with product technical support personnel at MBA.

How do I Change the Date Format?

You change the date format on a company-by-company basis. Three formats are available: MDY, YMD, and DMY.

1. From the Support/Manager main menu, type 2 (Table Management) in the command line and Press Enter.
2. From the Table Management display, select Option 1 (Work with table options). A list of table headings is displayed.
3. Type 1 next to the Work with companies heading and Press Enter. The Work with Companies display is shown.
4. Type 2 next to the company whose date format you want to change and Press Enter. The selected company's table is shown.
5. Position the cursor in the Date format field and type in the new format. Press F3. The Work with Companies display is shown again.

How Can I Get Rid of All Entries?

You remove entries by using the remove function. See Chapter 3, “Working with Entries.”

How do I Search for an Entry?

You can search for an entry or multiple entries by filling in search criteria on a search display. You can use wildcards as well as specific criteria. Certain delimiters, such as and, or, and and/or can also be used. See Chapter 3, “Working with Entries.”

How do I Change to an Alternate View?

You can change the way your display looks by using the Alternate View function in the System Controls menu. To return to a previously selected view, simply use the Alternate View function again. See Chapter 6, “System Controls.”

Can I Remove the Practice Company's entries?

Yes; you can remove the practice company's entries by using the Remove function, just as you would remove obsolete entries in your own companies.

Does Entry Escalation Work Automatically?

Entries are not escalated automatically on a regular basis. You must use the Escalate Entries function on the System Controls menu. When you use this function, all entries within the selected company are escalated. If you wish to automate the escalation on a regular basis, you could do so by using MBA's Job/Scheduler or the AS/400 built-in job scheduler.

What's the Fastest Way to Handle User Security During Installation?

You do not have to list every individual user in the security setup.

A more efficient way to set up users in Support/Manager is to assign *PUBLIC authority to give global access, then exclude users that should not have specific access to certain functions. See Chapter 6, “System Controls.”

How can I Print Certain Types of Problems?

Most reports give options to run specific status codes and/or specific assignment information. See Chapter 5, “Working with Reports.”

How can I Customize a Report?

The Extended Report option allows you to request specific criteria on its query function. See Chapter 5, “Working with Reports.”

How can I Preview a Report?

You can view the information in a report after the report is queued to the printer but before it is printed, by scrolling through the print file.

How can I Move Between Companies?

Most functions allow you to change the company number. The Company number field is usually the first user-input field of the display.

Chapter 2 – Getting Started with Support/Manager

At any AS/400 prompt, type **`go suptmgr/spm`** and Press Enter. The Support/Manager Main Menu is displayed.

```
SPM                        Support/Manager Main Menu

Select one of the following:

     1. Entry management
     2. Table management
     3. Work with reports
     4. System controls

    30. Remote customer support

    60. Update product security
```

Moving Around the Displays

You can move around any Support/Manager display by using the Tab key or the directional arrow keys.

- Use the Tab key to move the cursor from the current field to the beginning of the next field.
- Use the directional arrow keys to move the cursor horizontally or vertically on the display. You can move the cursor to the beginning of a field using these keys, but this method is not as efficient as using the Tab key.

Getting Online Help

If at any time you need further information about a field or a function, press the F1 key. This opens the Support/Manager online documentation.

System Security

You can set up Support/Manager security at the table level and at the user level. If you are not concerned with user security, it is best to leave the default of ***PUBLIC** in place, and then all users can access the Support/Manager entries.

Table Security

Each of the tables that you add for a company uses existing security from one of two places:

- If you are copying tables from a pre-existing company (for example, company 999), Support/Manager uses the security from that company.
- If you are adding a table from "scratch" (that is, not copying from an existing company), Support/Manager uses the security from company 000. Company 000 has ***PUBLIC** set up for ***ALL AUTHORITY** for the functions.

As the system processes a function (add, change, delete, etc) for the tables, Support/Manager checks user authority in the following order.

- It first checks the user profile set up on the operating system. If the user has SECADM, Security Officer, or Special Authority to objects, then Support/Manager does not check further.
- If the user does not have the necessary system-level authority, Support/Manager checks its own authority file for the user. If the user is set up in the function he or she is trying to access, then Support/Manager does not check further.
- If the user does is not set up in the function he or she is trying to access, Support/Manager checks for ***PUBLIC**, and uses the ***PUBLIC** authority setting, if ***PUBLIC** is set up.

If none of these authorities exist, then Support/Manager does not allow the user to access the function.

It is up to you to modify the authorities to suit your needs. You access the function authorities from the System Controls menu (option 4 on the main menu). You can control authority at two levels for each table.

- On the Work with Function Authorities menu, a ***WRKTBL** option is shown at the bottom of the list. By modifying the authority here, you control the ability for all users to work with all tables.
- On the Work with Function Authorities menu, the options to control security for each table are identified by ***ANAL** (Work with Analysts table), ***OPER** (Work with Operators table), ***COMP** (Work with Companies table), and so on.

NOTE: If the user has authority to modify the authority on a function (AUT=X), then option F13=Edit Authority is displayed in the command keys at the bottom of the display. This option works like the function authority list, except the user can only change the authority to the particular function he or she is in.

Entry security works in much the same way as table security, with the exception that each entry has its own authority.

Entry Security and Setting Up New Users

- You control user access to entries by using the ***ADDENT** option on the Work with Function Authorities list.
- You control the authority on a new entry when it is added by using the ***NEWENT** option on the Work with Function Authorities list. For example, you set up user "JOHN" to have the ability to display and copy an entry when it is first added. User "JOHN" can look at the entry and/or copy it once it exists, but he cannot update it, remove it, or change its authority.

All new entries are checked against the ***NEWENT** authority settings for a user. The authority for each entry is accessed by using option "9=Edit authority" from the Work with Entries by . . . display.

NOTE: The user must have the authority to change authority for the entry before he or she can use this option.

To Set Up Entry Security

To individualize your entry security (that is, to define each user rather than using ***PUBLIC**), perform the following steps.

1. Select option 4 (System Controls) from the Support/Manager Main Menu.

```
SPM                         Support/Manager Main Menu

Select one of the following:

     1. Entry management
     2. Table management
     3. Work with reports
  -->4. System controls

    30. Remote customer support

    60. Update product security
```

2. Select option 4 (Work with Function Authorities) from the System Controls menu. This function controls the authority to access the Work with Entry Options.

```
SPMMSYS                            System Controls

Select one of the following:

     1. Escalate Entries
     2. Alternate entry views
     3. Select a company to work with
  -->4. Work with function authorities
     5. Change entry authority
     6. Display current release
```

3. On the Work with Function Authorities menu, type a 2 in the blank line next to the ***WRKENT** (Work with Entries) option and Press Enter.

```
                        Work with Function Authorities

Company number . . . . . . . . .   999         1-999

Type options, Press Enter.
  2=Edit function authority

Opt    Function      Description
       *OPER         Work with operators
       *PCAU         Work with entry causes
       *PIND         Work with entry indicators
       *PTYP         Work with entry types
       *RLVL         Work with resolution levels
       *SCHENT       Search entries
       *SECR         Secretaries table file
       *SVRT         Work with severity codes
       *TYPE         Work with product types
 2     *WRKENT       Work with entry options
       *WRKFCT       Work with function authorities
       *WRKRPT       Work with report options
```

4. On the Edit Function Authority display, press the F6 key to add a new user.

```
Add New Users

 Company number . . . . . . . . . :  999
 Options list . . . . . . . . . . :  *WRKENT

 Description. . . . . . . . . . . :  Work with entry options


 Type new users, Press Enter.


 User        Authority  Display  Add  Update  Remove  Sel  Aut
```

5. Enter a valid user name in the User column.
6. Determine the type of authority you want the user to have. You can set up a general authority or you can select specific authorities to each of the listed functions. General authorities are ***ALL**, ***USE**, ***CHANGE**, or ***EXCLUDE**:
   - ***ALL** gives the user the authority to display, add, update, remove, and select the entry options. It also gives the user the authority to change the authority to the Work with Options function (the F13=Edit Authority key is displayed with the other function keys at the bottom of the Support/Manager displays). If you use the ***ALL** authority, all of the individual columns to the right of the Authority column show an X when you Press Enter.
   - ***USE** gives the user the authority to display the Work with Entry options. The user cannot perform any maintenance on the options or select the options. If you use the ***USE** authority, the Display column to the right of the Authority column shows an **X** when you Press Enter.
   - ***CHANGE** gives the user all authority to the Work with Entry options, but he or she cannot change the authority to the Work with Entry options. The F13=Edit Authority key is not displayed with the other function keys at the bottom of the Support/Manager displays for this user. If you use the ***CHANGE** authority, all of the individual columns to the right of the Authority column, with the exception of the AUT column, show an **X** when you Press Enter.
   - ***EXCLUDE** prohibits the user from doing anything to the Work with Entry options. If you use the ***EXCLUDE** authority, none of the individual columns to the right of the Authority column show an **X** when you Press Enter. Specific authorities are identified by entering an X under the specific authority that you want the user to have. If you set up a user using the specific authority method, the Authority column changes to ***USRDFN** when you Press Enter.

7. Press Enter twice to return to the Work with Function Authorities display.
8. On the Work with Function Authorities display, type a 2 in the blank line to the left of the ***ADDENT** (Add an Entry) option and Press Enter.

```
                         Work with Function Authorities

Company number . . . . . . . . .   999          1-999

Type options, Press Enter.
  2=Edit function authority

Opt    Function      Description
 2     *ADDENT       Add an entry
       *ANAL         Work with analysts
       *APPL         Work with applications
       *CHGTAG       Change field tags
       *CLRK         Clerks table file
       *COMP         Work with companies
       *CONT         Work with contacts
       *COOR         Work with coordinators
       *LOCN         Work with locations
       *MNGR         Managers table file
       *MSGF         Work with message files
       *NEWENT       New entry authorities
```

9. When the Edit Function Authority display is shown, press the F6 key. The Add New Users display is shown.

```
                               Add New Users

 Function name  . . . . . . . . :  *ADDENT
 Description. . . . . . . . . . :  Add an entry


 Type new users, Press Enter.

             Function
 User        Authority
```

10. Type in a valid user name in the User column, and then type in either ***USE** or ***EXCLUDE** in the Function Authority column ***USE** allows the user to add an entry. ***EXCLUDE** prohibits the user from adding an entry.
11. Press Enter twice to return to the Work with Function Authorities display.
12. On the Work with Function Authorities menu, type a 2 in the blank line next to the *NEWENT (Work with Entries) option and Press Enter.

```
                            Edit Function Authority

Company number . . . . . . . . . :  999
Function name  . . . . . . . . . :  *NEWENT

Description. . . . . . . . . . . :  New entry authorities


Type changes to current authorities, Press Enter.


User         Authority  Display       Update  Remove  Cpy  Aut
*PUBLIC      *ALL          X             X              X    X
```

13. On the Edit Function Authority display, press the F6 key to add a new user.

```
                            Add New Users

Company number . . . . . . . . . :  999
Function name  . . . . . . . . . :  *NEWENT

Description. . . . . . . . . . . :  New entry authorities


Type new users, Press Enter.


User         Authority  Display       Update  Remove  Cpy  Aut
```

14. Enter a valid user name in the User column.
15. Determine the type of authority you want the user to have for new entries. You can set up a general authority or you can select specific authorities to each of the listed functions. General authorities are ***ALL**, ***USE**, ***CHANGE**, or ***EXCLUDE**:
    - ***ALL** gives the user the authority to display, update, remove, and copy an entry after it has been added. It also gives the user the authority to change the authority for an entry by using option 9 on the Work with Entries by . . . list. If you use the ***ALL** authority, all of the individual columns to the right of the Authority column show an **X** when you Press Enter.
    - ***USE** gives the user the authority to display the entry after it is added. The user cannot perform any maintenance on the entry or change the authority for the entry. If you use the ***USE** authority, the Display column to the right of the Authority column shows an **X** when you Press Enter.
    - ***CHANGE** gives the user all authority to the entry, but he or she cannot change the authority for the entry. The F13=Edit Authority key is not displayed with the other function keys at the bottom of the Support/Manager displays for this user. If you use the ***CHANGE** authority, all of the individual columns to the right of the Authority column, with the exception of the **AUT** column, show an **X** when you Press Enter.
    - ***EXCLUDE** prohibits the user from doing anything to the entry once it is added. If you use the ***EXCLUDE** authority, none of the individual columns to the right of the Authority column show an X when you Press Enter. Specific authorities are identified by entering an **X** under the

specific authority that you want the user to have for an entry. If you set up a user using the specific authority method, the Authority column changes to ***USRDFN** when you Press Enter.

16. Press Enter twice to return to the Work with Function Authorities display.

Remember that if a user is set up in the AS/400 with the security "Administrator" or "Security Officer," or has all object authority, the Support/Manager security setting makes no difference for this user. The AS/400 security takes precedence over Support/Manager security.

Chapter 3 –
Working with Entries

Selecting a Company

Before working with entries, you must first select the company for which the entries apply. Each time you leave Support/Manager, it automatically keeps track of the last company and the last entry number for that company. When you log back on to your system under the same user ID, Support/Manager selects the company and entry you were working with during your previous session. Therefore, it is especially important that you make sure the correct company is selected before you begin working with entries.

To Select a Company

1. At the Support/Manager Main Menu, type 4 and Press Enter. The System Controls menu is shown.

```
SPMMSYS                         System Controls

 Select one of the following:

      1. Escalate Entries
      2. Alternate entry views
      3. Select a company to work with
      4. Work with function authorities
      5. Change entry authority
      6. Display current release
```

2. Type 3 and Press Enter. The Select a Company display is shown.

```
                              Select a Product

  Company number . . . . . . . .  999
  Position to  . . . . . . . . .

  Type options, Press Enter.
  1=Select

Opt  Product  Name                 Location             Phone
     001      BRMS
     002      IJS
     003      Test company
     015      Longhorn Properties
     999      Practice Co.         Computer Building    918-587-1500
```

3. In the **Opt** field next to the name of the company you want to work with, type 1 and Press Enter. The Confirm Selection display is shown.

```
                              Confirm Selection

Company number . . . . . . . . . :   999
Company name . . . . . . . . . . :   Practice Co.
Address line 1 . . . . . . . . . :   12758 E. Madera Way
Address line 2 . . . . . . . . . :   Suite 105
Address line 3 . . . . . . . . . :
Address line 4 . . . . . . . . . :
Address line 5 . . . . . . . . . :
City . . . . . . . . . . . . . . :   Livermore
State  . . . . . . . . . . . . . :   OK
Zip code . . . . . . . . . . . . :   74105
Phone  . . . . . . . . . . . . . :   918-587-1500
Report name  . . . . . . . . . . :                 Practice Co.
Location . . . . . . . . . . . . :   Computer Building
Last entry number assigned . . . :   0000010
```

4. Press Enter. The System Controls display is shown.
5. Press F3 to return to the Support/Manager Main Menu.

Adding an Entry

Support/Manager keeps track of the last Company you were working with and the last entry for that company. Therefore, when adding entries, be sure that the entry you are adding is for the correct company.

To add an entry

For complete field descriptions, press F1 when the cursor is located in the field or refer to Appendix A, "Field Descriptions."

1. At the Support/Manager Main Menu, type 1 and Press Enter. The Entry Management display is shown.

```
SPMMENT                          Entry Management

Select one of the following:

     1. Work with entry options
     2. Work with searches
     3. Perform search
     4. Add entry
     5. Copy entry
     6. Display entry
```

2. Type 4 and Press Enter. The Add Entry display is shown.

```
                                 Add Entry

Company number . . . . . . . . :   999
Entry number . . . . . . . . . :   11

Type choices, Press Enter.

Entry status . . . . . . . . . .   *OPEN                  *OPEN, F4 for list
Date entered . . . . . . . . . .    4/26/99               Date
Time entered . . . . . . . . . .   14:26                  Time
Contact name . . . . . . . . . .                          Name, F4 for list
  Contact date . . . . . . . . .      4/26/99             Date
  Contact time . . . . . . . . .     14:26                Time
Operator . . . . . . . . . . . .                          Name, F4 for list
Assigned to  . . . . . . . . . .                          Name, F4 for list
  Assigned date  . . . . . . . .      0/00/00             Date
  Assigned time  . . . . . . . .      0:00                Time
Short entry description  . . . .
                                                          F10 for extended
desc
```

3. In the **Entry status** field, type ***OPEN** or choose one from the popup window.
4. In the **Operator field**, type the name of the operator or choose one from the popup window.
5. In the **Contact name** field, type the name of the contact or choose one from the popup window.
6. The **Contact date** field will contain the current date and may be changed if desired.
7. The **Contact time** field will contain the current time and may be changed if desired.
8. In the **Short entry description**, type a meaningful description of the problem. If you need more space than provided in this field, press F10 to go to the Work with Extended Entry Description display.
9. In the **Severity code** field, type the appropriate code or choose one from the popup window.
10. In the **Entry type** field, type the appropriate type or choose one from the popup window.
11. In the **Application** field, type the name of the application or choose one from the popup window.
12. The **Date entered** field will contain the current date and may be changed if desired.
13. The **Time entered** field will contain the current time and may be changed if desired.

Copying an Entry

You can use Support/Manager to copy entry information to save time. You can use this function to copy entries within the same company or from one company to another. By saving you from re-typing information, this function also minimizes the chance for errors.

To copy an entry in the same company

1. At the Support/Manager Main Menu, type 1 and Press Enter. The Entry Management display is shown.

```
SPMMENT                        Entry Management

Select one of the following:

     1. Work with entry options
     2. Work with searches
     3. Perform search
     4. Add entry
     5. Copy entry
     6. Display entry
```

2. Type 5 and Press Enter. The Copy an Entry display is shown.

```
                               Copy an Entry


Type data, Press Enter.

Copy from:
  Company number . . . . . . . . .   999          1-999
  Entry number . . . . . . . . . .                Number

Copy to:
  Company number . . . . . . . . .   999          1-999
  Entry number . . . . . . . . . .                Number
```

3. The **Copy from: Company number** field is used to specify the company corresponding to the entry you want to copy. Note that this field contains the number of the company you are currently working with. You may change this number.
4. In the **Copy from: Entry number** field, type the number of the entry you want to copy. The **Copy to: Company number** field is used to specify the company to which you want to copy the entry. Note that this field contains the number of the company you are currently working with. You may change this number.
5. In the **Copy to: Entry number** field, type the entry number you want to assign to the copy. NOTE: You can leave this field blank and Support/Manager will assign the next available entry number for you.
6. Press Enter. The Add Entry display is shown.
7. Override any of the fields as necessary in the Add Entry display. For detailed instructions, refer to the section "Adding an Entry."

Displaying an Entry

You display an entry to obtain information about the entry. When you display an entry, the information is read-only; you cannot change it.

To display an entry

1. At the Support/Manager Main Menu, type 1 and Press Enter. The Entry Management display is shown.
2. Type 6 and Press Enter. The Display Entry using SPM display is shown.

```
                     Display Entry using SPM (DSPENTSPM)

Type choices, Press Enter.

Company number . . . . . . . . .                    Number
Entry number . . . . . . . . . .                    Number
Output . . . . . . . . . . . . .   *                *,  *PRINT
```

3. In the **Company number** field, type the number of the company corresponding to the entry you want to display.
4. In the **Entry number** field, type the number of the entry you want to display.
5. In the **Output** field, type ***** to show the display or type ***PRINT** to print the contents of the entry.
6. Press Enter.

Searching Entries

Support/Manager's search functions allow you to quickly find an entry or entries based on a set of search criteria that you define. You define the search name and criteria in the Work with Searches option. The system looks for all entries that match the search criteria defined in the search name you are using.

To search entries

1. At the Support/Manager Main Menu, type 1 and Press Enter. The Entry Management display is shown.
2. Type 3 and Press Enter. The Search Entries using SPM display is shown.

```
                     Search Entries using SPM (SCHENTSPM)

Type choices, Press Enter.

Entry search name  . . . . . . .   *NONE          *NONE, BRIAN...
Output . . . . . . . . . . . . .   *              *, *PRINT, *OUTFILE
```

3. In the **Entry search name** field, type the name of the search defined in the Work with Searches function.
4. In the **Output** field, type * to show the results of the search, type ***PRINT** to print the results, or type ***OUTFILE** to save the results to a file.
5. Press Enter. The Select Company number popup window is shown. This shows a list of companies where entries have been found that match the search criteria. If entries were found in only one company, this window is not shown; go to Step 7.
6. In the **Opt** field, type 1 next to the appropriate Company number and Press Enter. The Search Entries display is shown. This display shows the current entries for the company you selected.

```
                                 Search Entries

Company number . . . . . . . . .    001       1-999
Position to  . . . . . . . . . .              Starting number

Type options, Press Enter.
  1=Add   2=Change   3=Copy   4=Remove   5=Display   6=Print


Opt   Entry  Coordinator           Job Description            EntDt    Status
```

```
   9500002  Bruce                                         1/01/96  *CLOSED
   9500003  Brian          Woolworth's                    1/01/96  *CLOSED
   9500004  Joy                                           1/01/96  *CLOSED
   9500005  Bruce                                         1/03/96  *CLOSED
   9500007  Bruce                                         1/05/96  *CLOSED
   9500008  Bruce                                         1/05/96  *CLOSED
   9500009  Bruce                                         1/09/96  *CLOSED
   9500014  Bruce                                         2/07/96  *CLOSED
   9500015  Bruce                                         2/07/96  *CLOSED
                                                                   More...
```

7. In the **Opt** field, type the 1-digit option code corresponding to the action you want to take, as described below, and Press Enter.

Option	Next Display	For Detailed Instructions, See
1=Add*	Add Entry	Adding an Entry
2=Change	Change Entry	Changing an Entry
3=Copy	Copy Entry	Copying an Entry
4=Remove	Confirm Remove of Entries	Removing an Entry
5=Display	Display Entry	Displaying an Entry
6=Print	None	Printing an Entry

*Use on blank Entry field only.

Searching Shortcuts

If you want to perform a search on only one criterion, you can use the F5 or F6 shortcut keys from any Entry screen.

To search for the last entry (F5)

When you place the cursor in a searchable field and press the F5 key, the system searches for the last entry that matches the criteria in the selected field. For example, if you place the cursor in the Entry Status field, the Entry Status field has a value of *OPEN, and you press F5, the system finds the last entry with an entry status of *OPEN.

The system displays a popup window containing a summary of the entry.

```
                                 Change Entry

Product number . . . . . . . . :      1
Entry number . . . . . . . . . :   9500002

Type choices, Press Enter.

Problem status . . . . . . . . .   *CLOSED               *OPEN, F4 for list
............................................................................
.
.                                Entry Search
.
.  (No prior entries found to match search)
.
.
.
.
.
.
.
.
.
.
.
.
.
.
.
.
.
```

```
.  F3=Exit  F12=Cancel
.
```

You can either press F2 to show the Display Entry Search display, or press F3 to exit the search popup window.

To search for all entries (F6)

When you place the cursor in a searchable field and press the F6 key, the system searches all entries that match the criteria in the selected field. For example, if you place the cursor in the **Entry Status** field, the Entry Status field has a value of ***OPEN**, and you press F6, the system finds all entries with an entry status of ***OPEN**.

You are presented with a list of all entries that match the criteria, and you can select an entry from the list.

```
                                 Change Entry

 Company number . . . . . . . . . :     1
 Entry number . . . . . . . . . . :   9500002

 Type choices, Press Enter.

 Problem status . . . . . . . . .   *CLOSED               *OPEN, F4 for list
 ......................................................  Date
 :                    Entry Search                     :  Time
 :                                                     :  Name, F4 for list
 : Type options, Press Enter.                          :  Date
 : 5=Display                                           :  Time
 :                                                     :  Name, F4 for list
 : Opt  Entry number  Contact                 Date     :  Name, F4 for list
 :      9600098       MBA Internal           3/07/96   :  Date
 :      9600097       Frank Ingram           3/06/96   :  Time
 :      9600088       MBA Internal           3/06/96 + : k in all the
 :                                                     :  F10 for extended
 :  F3=Exit  F12=Cancel                                :
 :                                                     :
 :                                                     : ange text
 :.....................................................: ancel  F13=Notify
users
 Field cannot be blank or zeros for search
```

Changing an Entry

Although you can change an entry that was listed as a result of a search, the most direct way to change an entry is from the Work with Entry Options display. See "Working with Entry Options," later in this chapter.

To change an entry

1. At the Support/Manager Main Menu, type 1 and Press Enter. The Entry Management display is shown.
2. Type 3 and Press Enter. The Search Entries using SPM display is shown.
3. In the **Entry search name** field, type the name of the search that was defined in the Work with Searches function.
4. In the **Output** field, type ***** to show the results or type ***PRINT** to print the results or type ***OUTFILE** to save the results to a file.

5. Press Enter. The Select Company number popup window is shown. This shows the company or a list of companies where entries have been found that match the search criteria. If entries were found in only one company, this window is not shown; go to Step 7.
6. In the **Opt** field, type 1 next to the appropriate Company number and Press Enter. The Search Entries display is shown. This display shows the current entries for the company you selected.
7. In the **Opt** field, type 2 next to the entry you want to change and Press Enter. The Change Entry display is shown.

```
                                Change Entry

Product number . . . . . . . . :     1
Entry number . . . . . . . . . :   9500002

Type choices, Press Enter.

Problem status . . . . . . . . .   *CLOSED               *OPEN, F4 for list
Date entered . . . . . . . . . .    1/01/96              Date
Time entered . . . . . . . . . .   18:45                 Time
IBM contact  . . . . . . . . . .   Jonas Engvall         Name, F4 for list
  Contact date . . . . . . . . .      1/01/96            Date
  Contact time . . . . . . . . .     18:45               Time
MBA contact  . . . . . . . . . .   Joy                   Name, F4 for list
Assigned to  . . . . . . . . . .   Joy                   Name, F4 for list
  Assigned date  . . . . . . . .      1/16/96            Date
  Assigned time  . . . . . . . .     21:38               Time
Short problem description  . . .   DUPMEDBRM doesn't suck in all the members
of a set when run in batch       +                          F10 for extended
desc
```

8. Override any of the fields as necessary in the Change Entry display. For detailed instructions, refer to the section "Adding an Entry."

Removing an Entry

You may occasionally want to purge inactive or closed entries. You can do this with the Remove Entries function from the Search Entries display.

To remove an entry

1. At the Support/Manager Main Menu, type 1 and Press Enter. The Entry Management display is shown.
2. Type 3 and Press Enter. The Search Entries using SPM display is shown.
3. In the **Entry search name** field, type the name of the analyst who logged the entry.
4. In the **Output** field, type ***** to show the results of the search on the monitor, or type ***PRINT** to print the results or type ***OUTFILE** to save the results to a file.
5. Press Enter. The Select Company number popup window is shown. This is a list of companies where entries have been found that match the search criteria. If entries were found in only one company, this window is not shown; go to Step 7.
6. In the **Opt** field, type 1 next to the appropriate Company number and Press Enter. The Search Entries display is shown. This display shows the current entries for the company you selected.
7. In the **Opt** field, type 4 next to the entry you want to remove and Press Enter. The Confirm Remove of Entries display is shown.

```
                           Confirm Remove of Entries

   Press Enter to confirm your choices for 4=Remove.
   Press F12 to return to change your choices.

 Opt   Entry  Coordinator           Job Description            EntDt    Status
  4  9500004  Joy                                              1/01/96  *CLOSED
```

8. Press Enter to confirm the removal or press F12 to cancel the remove operation. The Search Entries display is shown again.

Printing an Entry

You can print any entry using the Print Entries option on the Search Entries display.

To print an entry

1. At the Support/Manager Main Menu, type 1 and Press Enter. The Entry Management display is shown.
2. Type 3 and Press Enter. The Search Entries using SPM display is shown.
3. In the **Entry search name** field, type the name of the analyst who logged the entry.
4. In the **Output** field, type * to show the results or type ***PRINT** to print the results or type ***OUTFILE** to save the results to a file.
5. Press Enter. The Select Company number popup window is shown. This shows the company or a list of companies where entries have been found that match the search criteria. If entries were found in only one company, this window is not shown; go to Step 7.
6. In the **Opt** field, type 1 next to the appropriate Company number and Press Enter. The Search Entries display is shown. This display shows the current entries for the company you selected.
7. In the **Opt** field, type 6 next to the entry you want to print and Press Enter. The entry is printed.

Working with Entry Options

Entries logged using Support/Manager can be sorted in several different ways. For example, you can work with entries by entry number or by analyst or by location, among other qualifiers.

These qualifiers are known as "entry options" in Support/Manager. This function also allows you to add, change, or remove these entry options.

To change an entry option

1. At the Support/Manager Main Menu, type 1 and Press Enter. The Entry Management display is shown.
2. Type 1 and Press Enter. The Work with Entry Options display is shown. This display lists the various qualifiers by which you can work with entries.

```
                          Work with Entry Options

Company number . . . . . . . . .   999          1-999, F4 for list
Company name . . . . . . . . . :   Practice Co.
Validation company . . . . . . :   999
Position to  . . . . . . . . . .                Starting sequence
Select Sequence Number . . . . .                Sequence number

Type options, Press Enter.
  1=Select  2=Change  4=Remove  5=Display

Opt Seq   Description                                           Type

    010   Work with entries by number                           SPM
    020   Work with entries by analyst                          SPM
    030   Work with entries by coordinator                      SPM
    040   Work with entries by application                      SPM
    050   Work with entries by contact                          SPM
    060   Work with entries by operator                         SPM
    070   Work with entries by location                         SPM
```

3. Verify the value in the **Company number** field is correct or type in a new Company number.
4. Type 2 in the **Opt** field next to the appropriate entry option and Press Enter. The Change Entry Option display is shown.

```
                          Change Entry Option

Company number . . . . . . . . :   999
Company name . . . . . . . . . :   Practice Co.
Validation company . . . . . . :   999
Option type  . . . . . . . . . :   SPM

Type choices, Press Enter.

Sequence . . . . . . . . . . . .    10
Description  . . . . . . . . . .   Work with entries by number
```

5. Change the **Sequence** number as necessary for the entry option.
6. Change the **Description** text as necessary for the entry option.
7. Press Enter to save your changes and return to the Work with Entry Options display.

Removing an Entry Option

If an entry option becomes obsolete for your environment, you may want to remove the entry option to avoid having to record useless information in an entry. You remove an entry option with the Remove option on the Entry Options display.

To remove an entry option

1. At the Support/Manager Main Menu, type 1 and Press Enter. The Entry Management display is shown.
2. Type 1 and Press Enter. The Work with Entry Options display is shown. This display lists the various qualifiers by which you can work with entries.

3. Verify the value in the **Company number** field is correct or type in a new Company number and Press Enter.
4. Type 4 in the **Opt** field next to the appropriate entry option(s) and Press Enter. The Confirm Remove of Options display is shown. All entry options that you marked with a 4 are listed.

```
                            Confirm Remove of Options

  Press Enter to confirm your choices for 4=Remove.
  Press F12 to return to change your choices.

Opt Seq   Description                                                  Type
 4  010   Work with entries by number                                  SPM
```

5. Press Enter to remove the entry option(s). Once you have confirmed the removal, the entry option(s) are permanently erased. You cannot recover an entry option that has been removed. Or press F12 to cancel the remove operation.

Displaying an Entry Option

The Display Entry option simply shows a read-only display of the selected entry option(s). You cannot change any information on the display.

To display an entry option

1. At the support/Manager Main Menu, type 1 and Press Enter. The Entry Management display is shown.
2. Type 1 and Press Enter. The Work with Entry Options display is shown. This display lists the various qualifiers by which you can work with entries.
3. Verify the value in the **Company number** field is correct or type in a new Company number.
4. Type 5 in the **Opt** field next to the appropriate entry option and Press Enter. The Display Entry Option display is shown.

```
                              Display Entry Option

 Sequence . . . . . . . . . . . . :    10
 Option type  . . . . . . . . . . :   SPM
 Description  . . . . . . . . . . :   Work with entries by number

 Action . . . . . . . . . . . . . :   WRKENTSPM SEQ(*ENTN) OUTPUT(*)
```

5. Press Enter or F3 to return to the Work with Entry Options display.

Working with Entries by . . .

This function allows you to sort and/or work with entries based on a number of different categories:

1. By number
2. By analyst
3. By coordinator
4. By application
5. By contact
6. By operator
7. By location
8. By entry type
9. By product type
10. By entry indicator
11. By entry cause
12. By job number

To sort and/or work with entries

1. At the Support/Manager Main Menu, type 1 and Press Enter. The Entry Management display is shown.
2. Type 1 and Press Enter. The Work with Entry Options display is shown. This display lists the various categories by which you can sort and/or work with entries.
3. Verify the value in the **Company number** field is correct or type in a new Company number.
4. Type 1 in the **Opt** field next to the sort category and Press Enter. The corresponding Work with Entries by ... display is shown. For example, if you typed a 1 in the **Opt** field next to “Work with entries by number”, then the Work with Entries by Number display is shown. This display provides a sorted list of the entries for the company you've selected.

```
                          Work with Entries by Analyst

Company number . . . . . . . . .   999                     1-999, F4 for list
Position to  . . . . . . . . . .                           Starting characters

Type options, Press Enter.
  1=Add   2=Change   3=Copy   4=Remove   5=Display   6=Print
  8=Send a page   9=Edit authority

Opt   Entry  Analyst                 AsgnDt AsgnTm            EntDt    Status

         10                         0/00/00    :00            2/20/96 *OPEN
```

This selection process operates the same for all the "Work with entries by..." lines on the Work with Entry Option display. In the Work with entries by... display, you can select several actions to be performed on the entries listed, as described below.

5. In the **Opt** field, type the 1-digit option code corresponding to the action you want to take and Press Enter.

Option	**Next Display**	**For Detailed Instructions, See**
1=Add*	Add Entry	Adding an Entry
2=Change	Change Entry	Changing an Entry
3=Copy	Copy Entry	Copying an Entry
4=Remove	Confirm Remove of Entries	Removing an Entry
5=Display	Display Entry	Displaying an Entry
6=Print	None	Printing an Entry
8=Send a page	(Must have ICOM/400 installed)	
9=Edit Authority	Edit Authority	System Controls

*Use on blank Entry field only.

Working with Entry Searches

The Work with Entry Searches function allows you to specify the criteria that Support/Manager will use to search for entries.

You can use one or more asterisk ("*") symbols in combination with a character string to limit the search. The asterisk represents variable data that is a subset of the requested information. See the online help system for specific information on limiting searches.

After you define the search criteria and Press Enter, Support/Manager accesses tables to find all the entries that match the search criteria. Search results are displayed in the Work with Search Results display, where you can change, copy, print, display, or delete matching entries.

To work with entry searches

1. At the Support/Manager Main Menu, type 1 and Press Enter. The Entry Management display is shown.
2. Type 2 and Press Enter. The Work with Entry Searches display is shown.

```
                           Work with Entry Searches

Position to  . . . . . . . . . .               Starting characters

Type options, Press Enter.
  1=Add    2=Change    3=Copy    4=Remove    5=Display
  8=Change description    9=Work with search results

Opt Name        Description

    BRIAN
    BRUCE       Search by PTR
    OPENAPARS   All open BRMS APARS
    OPENPMRS    All open BRM PMRs
```

This display lists the various sets of search parameters that have been defined. Each set of parameters is identified by a unique search Name that is briefly described in the Description field.

To add an entry search

1. In the Work with Entry Searches display, type 1 in the Opt field next to the blank Name field and Press Enter. The Add Search Entry display is shown.

```
                              Add Search Entry

Type choices, Press Enter.

Search name  . . . . . . . . . .                         Name
Company number . . . . . . . . .    999                  *All, F4 for list
Relationship of choices  . . . .   *AND                  *AND, *OR
Entry status . . . . . . . . . .                         *OPEN, F4 for list
Contact name . . . . . . . . . .                         Name, F4 for list
Operator . . . . . . . . . . . .                         Name, F4 for list
Assigned to  . . . . . . . . . .                         Name, F4 for list
```

2. In the **Search name** field, type the name uniquely identifying the search set.
3. In the **Company number** field, type the company number parameter you want to search on or type ***ALL** to search all companies or press F4 and select the Company number from the popup window.
4. In the **Relationship of choices** field, type ***AND** to specify that Support/Manager searches for entries that match all the search criteria or type ***OR** to specify that Support/Manager searches for entries that match on or more of the search criteria.
5. In the **Entry status** field, type ***OPEN** to search for all entries with a status of Open or press F4 and select the entry status from the popup window.
6. In the **Contact name** field, type the appropriate name or press F4 and select it from the popup window.
7. In the **Operator** field, type the appropriate name or press F4 and select the Operator name from the popup window.
8. In the **Assigned to** field, type the appropriate name or press F4 and select it from the popup window

At this point, you have specified enough search criteria to perform a search. However, you can specify more criteria if necessary.

```
                                Add Search Entry
Type choices, Press Enter.

Search name . . . . . . . . . .                            Name
Company number . . . . . . . . .    999                    *All, F4 for list
Relationship of choices . . . .    *AND                    *AND, *OR
Entry status . . . . . . . . . .                           *OPEN, F4 for list
Contact name . . . . . . . . . .                           Name, F4 for list
Operator . . . . . . . . . . . .                           Name, F4 for list
Assigned to . . . . . . . . . .                            Name, F4 for list
From entered date . . . . . . .    *BEGIN                  *CURRENT, *BEGIN, nn
To entered date . . . . . . . .    *CURRENT                *CURRENT, *BEGIN, nn
From contact date . . . . . . .    *BEGIN                  *CURRENT, *BEGIN, nn
To contact date . . . . . . . .    *CURRENT                *CURRENT, *BEGIN, nn
From assigned date . . . . . . .   *BEGIN                  *CURRENT, *BEGIN, nn
To assigned date . . . . . . . .   *CURRENT                *CURRENT, *BEGIN, nn
Short entry description . . . .
                                                           Characters
Development request ID . . . . .                           Characters
                                                                         More...
```

```
                                Add Search Entry
Type choices, Press Enter.

Application . . . . . . . . . .                            Name, F4 for list
Location . . . . . . . . . . . .                           Name, F4 for list
Job description . . . . . . . .
Coordinator . . . . . . . . . .                            Name, F4 for list
Short resolution description . .
                                                           Characters
Entry type . . . . . . . . . . .                           Name, F4 for list
Message ID . . . . . . . . . . .                           Name, F4 for list
Product type . . . . . . . . . .                           Name, F4 for list
Indicator . . . . . . . . . . .                            Name, F4 for list
Cause . . . . . . . . . . . . .                            Name, F4 for list
Estimated completion date . . .                            *CURRENT, Date, nn
Estimated completion time . . .     0:00                   Time
Actual completion date . . . . .                           *CURRENT, Date, nn
Actual completion time . . . . .    0:00                   Time
Severity code . . . . . . . . .                            F4 for list
                                                                      More...
```

```
                                Add Search Entry
Type choices, Press Enter.

Job number . . . . . . . . . . .                          Characters
Manager name . . . . . . . . . .                          Name, F4 for list
Clerk name . . . . . . . . . . .                          Name, F4 for list
Secretary name . . . . . . . . .                          Name, F4 for list
Resolution level . . . . . . . .                          F4 for list
Down time  . . . . . . . . . . .   0:00                   Time
Beginning date . . . . . . . . .                           *CURRENT, Date, nn
Beginning time . . . . . . . . .   0:00                   Time
Ending date  . . . . . . . . . .                           *CURRENT, Date, nn
Ending time  . . . . . . . . . .   0:00                   Time
Scheduled  . . . . . . . . . . .                          S, U
Elapsed time . . . . . . . . . .   0:00                   Time
Late report  . . . . . . . . . .                          Y, N
```

Note that the search criteria you have entered is logged, but not yet saved.

9. Press F3. The Exit Entry Search display is shown.
10. In the **Exit option** field, type in your option: Type **1** to save your settings and exit the search. If you type **1**, Support/Manager prompts you to name and describe the search criteria you want to save. Press Enter again to exit the search. Type **2** to exit the search without saving. Type **3** to resume the search.
11. If you typed **3** to resume the search, press F5 to perform the task. If you typed **3** to resume the search, press F10 to specify more search criteria, and then press F5 to perform the search. See **Expanding Search Criteria**, below.
12. After the search is performed, the Search Entries display is shown, with a list of all entries matching the search criteria. At this point, you can add an entry; or change, copy, remove, display, or print an existing entry.

Expanding Search Criteria

If you pressed F10, Support/Manager will show more fields in which you can provide search criteria. Certain fields in this expanded set of criteria allow you to specify ranges of values for Support/Manager to search.

For example, both **From entered date** and **To entered date** fields correspond to the date that an entry was logged into Support/Manager. They work together, allowing you to specify a range of dates to search for entries.

Likewise, the **From contact date** and **To contact date** fields are used for specifying a range of dates that the contact first reported the entry. Finally, the From assigned date and To assigned date fields specify a range of dates corresponding to when the entry was assigned to an analyst.

To expand search criteria

1. In the **From entered date**, type the earliest date that you want to search for entries with a matching date. Support/Manager searches for entries that were logged on or since this date. Type ***BEGIN** to search all entries that were logged into Support/Manager that match the other search criteria that you have specified.
2. In the **To entered date** field, type the most recent date that you want Support/Manager to search for entries with a matching logging date. Support/Manager will search for entries that were logged on or before this date. Type ***CURRENT** to include all entries that were logged into Support/Manager since the date typed in the From entered date field and/or on or before the current date.

3. In the **From contact date** field, type the earliest date that you want Support/Manager to search for entries with a matching Contact date. Support/Manager will search for entries with a contact date on or since this date. Type ***BEGIN** to search all entries that were logged into Support/Manager that match the other search criteria that you have specified.
4. In the **To contact date** field, type the most recent date that you want Support/Manager to search for entries with a matching Contact date. Support/Manager will search for entries that were logged on or before this date. Type ***CURRENT** to include all entries that were logged into Support/Manager since the date typed in the From Contact date field and/or on or before the current date.
5. In the **From assigned date** field, type the earliest date that you want Support/Manager to search for entries with a matching Assigned to date. Type ***BEGIN** to search all entries that were logged into Support/Manager that match the other search criteria that you have specified.
6. In the **To assigned date** field, type the most recent date that you want Support/Manager to search for entries with a matching Assigned to date. Support/Manager will search for entries that were logged on or before this date. Type ***CURRENT** to include all entries that were logged into Support/Manager since the date typed in the From assigned date and/or on or before the current date.
7. In the **Short entry description** field, type a brief description of the entry. Or, leave this field blank.
8. In the **Development request** ID field, type in action item text associated with an entry, such as system maintenance request, a work order number, and so on, or leave this field blank.
9. Press Page Down to advance to the next page of the Search Entries using SPM display.

10. In the **Application** field, type the appropriate program name. Press F4 and select it from the popup window, or leave this field blank.
11. In the **Division** field, type the appropriate division name. Press F4 and select it from the popup window, or leave this field blank.
12. In the **Job description** field, type descriptive text pertaining to the job, or leave this field blank.
13. In the **Coordinator** field, type the name of the coordinator associated with the entries. Press F4 and select it from the popup window, or leave this field blank.
14. In the **Short resolution description** field, type a brief description of the resolution, or leave this field blank.
15. In the **Entry type** field, type the type of entry you want Support/Manager to search for. Press F4 and select it from the popup window or leave this field blank.
16. In the **Message ID** field, type the appropriate message ID. Press F4 and select it from the popup window, or leave this field blank.
17. In the **Product type** field, type the code identifying the type of product associated with the entry. Press F4 and select it from the popup window or leave this field blank.
18. In the **Indicator** field, type the code identifying the symptom encountered by the customer who initiated the entry. Press F4 and select it from the popup window, or leave this field blank.
19. In the **Cause** field, type the code identifying the cause of the symptom that initiated the entry. Press F4 and select it from the popup window, or leave this field blank.
20. In the **Estimated completion date** field, type the date the entry was estimated to be completed, or leave this field empty.
21. In the **Estimated completion time** field, type the time the entry is estimated to be complete. Use 24-hour format, including hour and minutes; the colon is optional. For example, 8:00 in the morning should be typed as 0800 or 08:00. Four-thirty in the afternoon should be typed as 1630 or 16:30, or leave this field empty.
22. In the **Actual completion date** field, type the date the entry was actually completed, or leave this field empty.
23. In the **Actual completion time** field, type the time the entry was actually completed. Use 24-hour format as was used in the Estimated completion time field, or leave this field empty.
24. In the **Severity code** field, type the severity code to search. Press F4 and select it from the popup window, or leave this field blank.
25. Press Page Down to advance to the last page of the Search Entries using SPM display.
26. In the **Job number** field, type the unique 6-character job number associated with the entry, or leave this field blank.
27. In the **Manager name** field, type the appropriate manager name. Press F4 and select it from the popup window, or leave this field blank.
28. In the **Clerk name** field, type the appropriate clerk name. Press F4 and select it from the popup window, or leave this field blank.
29. In the **Secretary name** field, type the appropriate secretary name. Press F4 and select it from the popup window, or leave this field blank.
30. In the **Resolution level** field, type the unique code associated with the entry resolution. Press F4 and select it from the popup window, or leave this field blank.
31. In the **Down time** field, type the amount of down time associated with the entry, using 24-hour format, or leave this field empty.
32. In the **Beginning date** field, type the beginning date of the down time, or leave this field empty.
33. In the **Beginning time** field, type the beginning time of the down time period, using 24-hour format, or leave this field empty.
34. In the **Ending date** field, type the ending date of the down time period, or leave this field empty.
35. In the **Ending time** field, type the ending time of the down time period, using 24-hour format, or leave this field empty.
36. In the **Scheduled** field, type either S (for scheduled down time) or U (for unscheduled down time), or leave this field blank.
37. In the **Elapsed time** field, type the total amount of elapsed down time, using 24-hour format, or leave this field empty.

38. In the **Late report** field, type Y to search for entries for which a late report was generated. Type N to search for entries for which a late report was not generated, or leave this field blank.
39. Press F5 to perform the search. After the search is performed, the Search Entries display is shown, with a list of all entries matching the search criteria. At this point, you can add an entry; or change, copy, remove, display, or print an existing entry.

To change an entry search

1. In the Work with Entry Searches display, type **2** in the **Opt** field next to the entry search you want to change, and Press Enter. The Search Entries using SPM display is shown.
2. Change any information, as needed, and Press Enter. The changes you made are logged but not saved. To save them, press F3.The Exit Entry Search display is shown.
3. In the Exit option field, type in your option: Type **1** to save your settings and exit the search. If you type a **1**, Support/Manager prompts you to name and describe the search criteria you want to save. Type **2** to exit the search without saving. Type **3** to resume the search.

To remove an entry search

1. In the Work with Entry Searches display, type 4 in the **Opt** field next to the entry search you want to remove and Press Enter. The Confirm Remove of Entries Searches display is shown.
2. Are you sure you want to remove this search definition? If so, Press Enter to remove the search definition. If not, press F12 to return to the Work with Entry Searches display.

To display entry searches

1. In the Work with Entry Searches display, type **5** in the **Opt** field next to the entry search you want to display, and Press Enter. The Display Search Entries Searches display is shown. Note that no fields can be changed.
2. When you have finished reviewing the information, press F3.The Work with Entry Searches display is shown again.

To change an entry search description

1. In the Work with Entry Searches display, type **8** in the **Opt** field next to the entry search description you want to change and Press Enter. The Change Description of Entries Searches display is shown.

```
                Change Description of Entry Searches

Type choices, Press Enter.

Search name  . . . . . . . . . .   BRIAN
Search description . . . . . . .
```

2. Type in a new description for the selected search name and Press Enter. The Work with Entry Searches display is shown again, with the new description of the search displayed in the Description field.

Working with search results

When you have set up the types of searches you want to perform, you can then search the various tables in Support/Manager to find the entries that match the search criteria.

Chapter 4 –
Setting up a Company

Overview

When you set up a company in Support/Manager, the program creates all the necessary underlying tables. All you have to do is type in the company information, and Support/Manager does the rest for you.

NOTE: When you first install Support/Manager, the Select a Company display is shown. The only company available for selection is Company 999, which is the practice company delivered with Support/Manager.

Adding a new company from scratch

You may have a situation where you want to create a new company whose information is not based on the Practice Company or another existing company. In this case, you want to create the new company from scratch.

For detailed field descriptions, press f1 while the cursor is located in the field, or see Appendix A, "Field Descriptions."

To add a new company from scratch

1. At the Support/Manager Main Menu, type 2 and Press Enter. The Table Management display is shown.

```
SPMMTBL                        Table Management

  Select one of the following:

      1. Work with table options
      2. Print table listings




 Selection or command
 ===>

 F3=Exit   F4=Prompt   F9=Retrieve   F10=Commands   F12=Cancel
```

2. At the Table Management display, type 1 and Press Enter. The Work with Table Options display is shown, with the last company you worked with shown in the **Company number** field.

```
                           Work with Table Options
Company number . . . . . . . . .   999          1-999, F4 for list
Company name . . . . . . . . . :   Practice Co.
Validation company . . . . . . :   999
Position to  . . . . . . . . . .                Starting sequence
Select Sequence Number . . . . .                Sequence number

Type options, Press Enter.
  1=Select  2=Change  4=Remove  5=Display

Opt Seq   Description                                          Type

    010   Work with companies                                  SPM
    020   Work with operators                                  SPM
    030   Work with analysts                                   SPM
    040   Work with product types                              SPM
    050   Work with coordinators                               SPM
    060   Work with entry types                                SPM
    070   Work with entry indicators                           SPM

More..
```

3. In the **Opt** field of "Work with companies," type 1 and Press Enter. The Work with Companies display is shown.

```
                           Work with Companies
 Position to  . . . . . . . . . .                Starting number

 Type options, Press Enter.
   1=Add   2=Change   3=Copy   4=Remove   5=Display

 Opt Product  Product name        Location            Phone

     001      BRMS
     002      IJS
     003      Test company
     015      Longhorn Properties
     999      Practice Co.        Computer Building   918-587-1500
```

4. In the **Opt** field of the first line, type 1 and Press Enter. The Add Companies display is shown.

```
Add Company                         MBABKY

 Type choices, Press Enter.

 Company number . . . . . . . . .                          Number
 Company name . . . . . . . . . .
 Address line 1 . . . . . . . . .
 Address line 2 . . . . . . . . .
 Address line 3 . . . . . . . . .

 City . . . . . . . . . . . . . .                          Characters

 State  . . . . . . . . . . . . .                          Characters
```

```
Zip code . . . . . . . . . . . . .                                Characters
Phone  . . . . . . . . . . . . . .                                Characters
Report name  . . . . . . . . . . .
Validation company . . . . . . . .                                Number
Location . . . . . . . . . . . . .                                Characters
Extended roll value  . . . . . .     5                            Number
```

5. Type in the new company information. **Note**: The **Company Number** and **Administrator** fields are required. The Administrator must be a valid user profile set up in the company's operating system. Note: The **Validation Company** field is used to pull standard table information in to a company that you create. For example, if your validation company is 999, a standard set of tables is used for the company you are creating.
6. When you have finished adding company information, Press Enter. The Work with Companies display is shown again, with the new company number, Company name, location, and phone number shown.

Adding a New Company by Copying

When you first install Support/Manager, you may want to base your first company on the Practice Company. If you need to add a company whose information is similar to an existing company, you may want to copy the information from the existing company, and then just change the information that is different.

For detailed field descriptions, press F1 while the cursor is located in the field, or see Appendix A, "Field Descriptions."

To add a new company by copying an existing company

1. At the Support/Manager Main Menu, type 2 and Press Enter. The Table Management display is shown.
2. At the Table Management display, type 1 and Press Enter. The Work with Table Options display is shown, with the number of the last company you worked with shown in the **Company number** field.
3. In the **Opt** field next to “Work with companies,” type 1 and Press Enter. The Work with Companies display is shown.
4. In the **Opt** field next to the company whose information you want to copy, type 3 and Press Enter. The Copy Companies display is shown.

```
                                Copy Company

To copy table entry, type New Number, Press Enter.


Company        New Number
015
```

5. In the **New Number** field, type the number of the new company and Press Enter. The Work with Companies display is shown again, with the new company number shown in the “company” column. NOTE: If you accidentally type a number that already exists, the message “Company number xxx already exists” is displayed, and the Work with Companies display is shown again. Repeat Steps 4 and 5.
6. In the **Opt** field of the new company's number, type 2 and Press Enter. The Change Companies display is shown.

```
                                Change Product

Company number . . . . . . . . :   020

Type choices, Press Enter.

Company name . . . . . . . . . .   Longhorn Properties L.L.C.
Address line 1 . . . . . . . . .
Address line 2 . . . . . . . . .
Address line 3 . . . . . . . . .

City . . . . . . . . . . . . . .                          Characters

State  . . . . . . . . . . . . .                          Characters
Zip code . . . . . . . . . . . .                          Characters
Phone  . . . . . . . . . . . . .
Report name  . . . . . . . . . .          Longhorn Properties L.L.C.
Validation company . . . . . . .    15                    Number
Location . . . . . . . . . . . .                          Characters
```

7. Change the company information, as needed. When you have finished, Press Enter. The Work with Companies display is shown again, with any changes you made to the Company name, Location, and Phone fields shown.
8. Press F3 to return to the Work with Table Options display.

Changing a company's information

From time to time, you may need to change the information about a company. For example, the company's address may have changed, or personnel changes may have placed new people in some of the positions listed.

When this occurs, you can use the Change Companies display to modify the company information.

For detailed field descriptions, press F1 while the cursor is located in the field, or see Appendix A, "Field Descriptions."

To change company information

1. At the Support/Manager Main Menu, type 2 and Press Enter. The Table Management display is shown.
2. At the Table Management display, type 1 and Press Enter. The Work with Table Options display is shown.
3. In the **Opt** field next to "Work with companies," type 1 and Press Enter. The Work with Companies display is shown, with the number of the last company you worked with shown in the "Company number" field.
4. In the **Opt** field next to the company whose information you want to change, type 2 and Press Enter. The Change Companies display is shown.

```
                               Change Company
Company number . . . . . . . . :   020

Type choices, Press Enter.

Company name . . . . . . . . . .   Longhorn Properties L.L.C.
Address line 1 . . . . . . . . .
Address line 2 . . . . . . . . .
Address line 3 . . . . . . . . .

City . . . . . . . . . . . . . .                         Characters

State  . . . . . . . . . . . . .                         Characters
Zip code . . . . . . . . . . . .                         Characters
Phone  . . . . . . . . . . . . .
Report name  . . . . . . . . . .          Longhorn Properties L.L.C.
Validation company . . . . . . .    15                   Number
Location . . . . . . . . . . . .                         Characters
```

5. Change the company information, as needed. When you have finished changing company information, Press Enter. The Work with Companies display is shown again, with any changes you made to the Company name, Location, and Phone fields shown.
6. Press F3 to return to the Work with Table Options display.

Removing a company

You may at some point need to remove one or more companies. You can do this either one company at a time or in a batch process.

To remove a company

1. At the Support/Manager Main Menu, type 2 and Press Enter. The Table Management display is shown.
2. At the Table Management display, type 1 and Press Enter. The Work with Table Options display is shown, with the number of the last company you worked with shown in the “Company number” field.
3. In the **Opt** field next to “Work With Companies,” type 1 and Press Enter. The Work with Companies display is shown.
4. In the **Opt** field next to the company or companies you want to delete, type 4 and Press Enter. The Confirm Remove of Companies display is shown.

```
                         Confirm Remove of Company

  Press Enter to confirm your choices for 4=Remove.
  Press F12 to return to change your choices.

Opt Company  Company name        Location            Phone
 4  020      Longhorn Properties
```

5. If you chose only one company to delete, Press Enter to remove the company from the database. If you chose more than one company to delete, press the F19 key to delete all the selected companies. The Work with Companies display is shown again, but the list no longer contains the company or companies you just deleted.

6. Press F3 to return to the Work with Table Options display. The company number you deleted is still shown in the "Company number" field, but no listings are shown in the options list.
7. Press F3 again to return to the Table Management display.

Displaying a company's information

You have the option of simply displaying a company's information without the ability to change it. You do this by using the 5=Display option.

For detailed field descriptions, press F1 while the cursor is located in the field, or see Appendix A, "Field Descriptions."

To display company information

1. At the Support/Manager Main Menu, type 2 and Press Enter. The Table Management display is shown.
2. At the Table Management display, type 1 and Press Enter. The Work with Table Options display is shown, with the number of the last company you worked with shown in the "Company number" field.
3. In the **Opt** field next to "Work With Companies," type 1 and Press Enter. The Work with Companies display is shown.
4. In the **Opt** field next to the company whose information you want to see, type 5 and Press Enter. The Display Companies display is shown, with the selected company's information shown. Note that none of the fields can be changed.

```
                                Display Company

Company number . . . . . . . . . :   999
Company name . . . . . . . . . . :   Practice Co.
Address line 1 . . . . . . . . . :   12758 E. Madera Way
Address line 2 . . . . . . . . . :   Suite 105
Address line 3 . . . . . . . . . :

City . . . . . . . . . . . . . . :   Livermore

State  . . . . . . . . . . . . . :   OK
Zip code . . . . . . . . . . . . :   74105
Phone  . . . . . . . . . . . . . :   918-587-1500
Report name  . . . . . . . . . . :                 Practice Co.
Validation company . . . . . . . :   999
Location . . . . . . . . . . . . :   Computer Building
Extended roll value  . . . . . . :   005
Maximum extended lines . . . . . :   00099
Administrator  . . . . . . . . . :   QSYSOPR
```

5. When you have finished viewing company information, Press Enter. The Work with Companies display is shown again.
6. Press F3 to return to the Work with Table Options display.

Working with Entries in Company Tables

When you set up a company in Support/Manager, Support/Manager creates several tables that contain the specific information about the company. When working with tables, you use special displays, known as forms, to add, change, copy, or remove table entries. After you complete a form and Press Enter, Support/Manager modifies the appropriate table.

You can add, change, copy, remove and display tables associated with a company.

For detailed field descriptions, press F1 while the cursor is located in the field, or see Appendix A, "Field Descriptions."

To access table groups

1. At the Support/Manager Main Menu, type 2 and Press Enter. The Table Management display is shown.
2. At the Table Management display, type 1 and Press Enter. The Work with Table Options display is shown, with the number of the last company you worked with shown in the "Company number" field.
3. If you need to change companies, move the cursor to the "Company number" field and type in a different company number; then Press Enter.
4. In the **Opt** field next to the type of table you want to work with, type 1 and Press Enter. The Work with ... display for the table type you selected is shown. In the following example, Work with operators was selected.

```
                              Work with Operators

Company number . . . . . . . . .   999          1-999, F4 for list
Validation company . . . . . . :   999
Position to  . . . . . . . . . .                Starting characters

Type options, Press Enter.
  1=Add   2=Change   3=Copy   4=Remove   5=Display

Opt Initials    Name                  Phone                  Extension

    CAB         Tony Bacher
    HSC         Heather Cash
    TJB         Tom Byers
    VJW         Joe Woodruff
```

To add information to a table

1. Once you have the Work with . . . display shown, type 1 in the **Opt** field next to the first blank table entry, and then Press Enter. The Add . . . display is shown

```
                                Add Operators

 Company number . . . . . . . . :   999
 Validation company . . . . . . :   999

 Type choices, Press Enter.

 Operator initials  . . . . . . .                          Characters
 Operator name  . . . . . . . . .                          Characters
 Business phone . . . . . . . . .                          Characters
 Extension  . . . . . . . . . . .                          Numbers
 Home phone . . . . . . . . . . .                          Characters
```

2. Type in the information you want to add, and Press Enter. The Work with . . . display is shown again.

To copy information from one table to another

1. Once you have the Work with . . . display shown, type 3 in the **Opt** field next to the table entry you want to copy, and then Press Enter. The Copy . . . display is shown.

```
                                  Copy Operators

To copy table entry, type New Name, Press Enter.

Initials       New Name
TJB
```

2. In the **New Name** field, type in the name or initials you want this information copied to, and Press Enter. The Work with . . . display is shown again. You can now select the new table entry from the Work with . . . display to change any information.

To remove information from a table

1. Once you have the Work with . . . display shown, type 4 in the **Opt** field next to the table entry you want to remove, and then Press Enter. The Confirm Remove of . . . display is shown.

```
                          Confirm Remove of Operators

  Press Enter to confirm your choices for 4=Remove.
  Press F12 to return to change your choices.

Opt Initials    Name                    Phone                   Extension
 4  TJB         Tom Byers
```

2. Are you sure you want to remove this table entry? If so, Press Enter to confirm your choice to remove the entry. If not, press F12 to return to the Work with . . . display.

To display information in a table

1. Once you have the Work with . . . display shown, type 5 in the **Opt** field next to the table entry you want to display, and then Press Enter. The Display . . . display is shown.

```
                              Display Operators

Company number . . . . . . . . :   999
Validation company . . . . . . :   999
Operator initials  . . . . . . :   TJB
Operator name  . . . . . . . . :   Tom Byers
Business phone . . . . . . . . :
Extension  . . . . . . . . . . :
Home phone . . . . . . . . . . :
                               :
```

2. View the table entry's information. Note that none of the fields may be changed. When finished, Press Enter. The Work with . . . display is shown again.

Working with Table Groups

Support/Manager stores predefined information, such as a list of operators or a list of product types, in tables. All information of a similar type is stored in the same table. Support/Manager then uses this information to build the lists accessed by the F4 key in Entry Management.

The Work with Table Options function allows you to add, select, change, display and remove tables.

To select a table group

1. In the Work with Table Options display, type 1 in the **Opt** field next to the table group you want to select. The Work with . . . display is shown for the table group you selected. For example, if you typed a 1 next to the Work with Companies field, the Work with Companies display is shown.

```
                              Work with Companies

Position to  . . . . . . . . . .                Starting number

Type options, Press Enter.
  1=Add   2=Change   3=Copy   4=Remove   5=Display

Opt Company  Company name         Location            Phone

    001      BRMS
    002      IJS
    003      Test company
    015      Longhorn Properties
    999      Practice Co.         Computer Building    918-587-1500
```

2. From this point, you can add, change, copy, remove, or display table entries in the selected group.

To add a new table group

1. In the Work with Table Options display, type 1 in the **Opt** field next to the first, blank **Seq** field. The Add Table Option display is shown.

```
                               Add Table Option

Company number . . . . . . . . . :   999
Company name . . . . . . . . . . :   Practice Co.
Validation company . . . . . . . :   999
Option type  . . . . . . . . . . :   USR

Type choices, Press Enter.

Sequence . . . . . . . . . . . . .
Description  . . . . . . . . . . .

Action . . . . . . . . . . . . . .
```

2. Type in a sequence number and a description for this new table. If you want the table to be associated with an AS/400 command, also type in a command in the **Action** field. Press Enter. The Work with Table Options display is shown again. The table you added is now shown in the list, positioned in numerical order in the **Seq** field. Note that the table Type is USR, which means that this table was not supplied by Support/Manager.

To change a table group

1. In the Work with Table Options display, type 2 in the **Opt** field next to the table group you want to change. The Change Table Option display is shown for the table group you selected.

```
                             Change Table Option

Company number . . . . . . . . . :   999
Company name . . . . . . . . . . :   Practice Co.
Validation company . . . . . . . :   999
Option type  . . . . . . . . . . :   SPM

Type choices, Press Enter.

Sequence . . . . . . . . . . . . .    30
Description  . . . . . . . . . . .   Work with analysts
```

2. Type in the new sequence number and/or description for this table group. Changing the sequence number will change this table group's location within the list on the Work with Table Options display. Press Enter. The new information is shown on the Work with Table Options display.

To remove a table group

1. In the Work with Table Options display, type 4 in the **Opt** field next to the table group you want to remove. Note that you can only remove table groups with a type of USR. Table groups with a type of SPM cannot be removed. The Confirm Remove of Options display is shown for the table group you selected. **CAUTION**: Once you have confirmed the removal, the table group is permanently erased. You cannot recover a table group that has been removed.

```
                         Confirm Remove of Options

   Press Enter to confirm your choices for 4=Remove.
   Press F12 to return to change your choices.

 Opt Seq   Description                                          Type
  4  030   Work with analysts                                   SPM
```

2. Are you sure you want to remove this table group? If so, Press Enter. The table group is removed. If not, press the F12 key to return to the Work with Table Options display.

To display a table group's description

1. In the Work with Table Options display, type a 5 next to the table group whose information you want to view, and Press Enter. The Display Table Option display is shown for the group you selected.

```
                             Display Table Option

Sequence . . . . . . . . . . . . :    30
Option type  . . . . . . . . . . :   SPM
Description  . . . . . . . . . . :   Work with analysts

Action . . . . . . . . . . . . . :   WRKTBLSPM TYPE(*ANAL) OUTPUT(*)
```

2. View the information, and then Press Enter. Note that none of the fields can be changed. When you Press Enter, the Work with Table Options display is shown again

Selecting a Different Company

When you start Support/Manager, it automatically remembers the last company you worked with. However, you may need to work with another company.

To change companies

1. At the Support/Manager Main Menu, type 4 and Press Enter. The System Controls display is shown.

```
SPMMSYS                         System Controls

Select one of the following:

     1. Escalate Entries
     2. Alternate entry views
     3. Select a company to work with
     4. Work with function authorities
     5. Change entry authority
     6. Display current release
```

2. At the System Controls display, type 3 and Press Enter. The Select a Company display is shown.

```
                                Select a Company

  Company number . . . . . . . .  999
  Position to  . . . . . . . . .

  Type options, Press Enter.
  1=Select

Opt  Company  Name                 Location             Phone
     001      BRMS
     002      IJS
     003      Test company
     015      Longhorn Properties
     999      Practice Co.         Computer Building     918-587-1500
```

3. In the **Opt** field next to the company you want to select, type 1 and Press Enter. The Confirm Selection display is shown.

```
                               Confirm Selection

Company number . . . . . . . . . :   003
Company name . . . . . . . . . . :   Test company
Address line 1 . . . . . . . . . :
Address line 2 . . . . . . . . . :
Address line 3 . . . . . . . . . :
Address line 4 . . . . . . . . . :
Address line 5 . . . . . . . . . :
City . . . . . . . . . . . . . . :
State  . . . . . . . . . . . . . :
Zip code . . . . . . . . . . . . :
Phone  . . . . . . . . . . . . . :
Report name  . . . . . . . . . . :
```

```
Location . . . . . . . . . . . :
Last entry number assigned . . :   0000000
```

4. If you are sure this is the company you want, Press Enter. The System Controls display is shown again. NOTE: If this is not the company you want, press F3 to return to the Select a Company display. Then repeat Steps 3 and 4.
5. At the System Controls menu, press F3 to return to the Support/Manager Main Menu.
6. At the Support/Manager Main Menu, type 2 and Press Enter. The Table Management display is shown.
7. At the Table Management menu, type 1 and Press Enter. The Work with Table Options display is shown, with the number of the company you just selected shown in the **Company number** field.

Setting up New Tables

Even though you are not required to enter new table information for a company, setting up tables is a recommended practice for a new company, even if you copied an existing company's information to set up your company. Tables allow consistency in spelling and descriptions, as well as validations of existing names and descriptions. Having tables set up with this type of existing information will allow for more accurate and "cleaner" reports and inquiries.

How tables are used by Support/Manager, and how the user is required to enter information from a table, are determined by how you set up the Table Editing Specifiers when setting up your company information. The following conditions are dictated by the Table Editing Specifiers settings.

- If you entered **N** beside the Mandatory Entry column, the user is not required to type information in the associated field (Contact name, Operator, Product type, and so on) on the entry screen. A **Y** indicates that the user is required to type information in the field.
- If you entered **Y** in the Allow Override column of the table editing specifiers, the user can override any previously established table information for a field. The user is allowed to enter any name or code description in the associated field (Contact name, Operator, Product type, and so on) on the entry screen. An **N** indicates that the user cannot override established table information.

The two specifiers work in combination to determine the way in which the user can enter information in a field. The following examples clarify how the Table Editing Specifiers dictate how users type in information when adding or editing an entry.

Sample Field	Allow Override Setting	Mandatory Entry Setting	Resulting Entry Screen Requirements
Contact	Y	N	The user is not required to enter a Contact name, but if he does, it can be anything (i.e., table information is not used).
Contact	Y	Y	The user is required to enter data in the Contact field, and he can enter anything (i.e., table information is not used).
Contact	N	Y	The user is required to enter a Contact name, and it must be a valid Contact name from the Contact table.

Contact	N	N	The user is not required to enter data in the Contact field, but if he does, it must be a valid name from the Contact table.

Chapter 5 –
Working with Reports

Overview

When you first set up a company, certain default report formats are available to you. The Work with Report Options function allows you to:

- add new reports,
- select, display, and copy existing reports,
- change report descriptions, and
- remove user-defined reports.

Accessing Report Functions

At the Support/Manager Main Menu, type 3 in the command line and Press Enter. The Work with Report Options display is shown.

```
                            Work with Report Options

Company number . . . . . . . . .   999          1-999, F4 for list
Company name . . . . . . . . . :   Practice Co.
Validation company . . . . . . :   999
Position to  . . . . . . . . . .                Starting sequence
Select Sequence Number . . . . .                Sequence number

Type options, Press Enter.
  1=Select  2=Change  4=Remove  5=Display

Opt Seq   Description                                                Type

    010   Print allocation by analyst                                SPM
    020   Print coordinator report                                   SPM
    030   Print coordinator status report                            SPM
    040   Print daily morning report                                 SPM
    050   Print entry status report                                  SPM
    060   Print location summary                                     SPM
    070   Print monthly status report                                SPM
```

To add a report

1. In the **Opt** field next to the first, blank **Seq** field, type 1 and Press Enter. The Add Report Option display is shown.

```
                               Add Report Option

 Company number . . . . . . . . :   999
 Company name . . . . . . . . . :   Practice Co.
 Validation company . . . . . . :   999
 Option type  . . . . . . . . . :   USR
```

```
Type choices, Press Enter.

Sequence . . . . . . . . . . . .
Description  . . . . . . . . . .
Action . . . . . . . . . . . .
```

2. Type in a sequence number (where you want this report to be displayed in the list of reports), the report name, and any standard AS/400 command you want to associate with this report.
3. Press Enter. The report is added to the Add Report Option list.

To select a report

1. In the **Opt** field next to the sequence number of the report you want to select, type 1 and Press Enter. The report you selected is displayed. In the following example, the report for "Allocation By Analyst" was selected.

```
                   Print Allocation By Analyst (PRTANLSPM)

Type choices, Press Enter.

Company number . . . . . . . . .   *ALL          *ALL, 001, 002...
               + for more values
Analyst  . . . . . . . . . . . .   *ALL
Status . . . . . . . . . . . . .   *ALL          *ALL, *OPEN, *CLOSED...
               + for more values
Location . . . . . . . . . . . .   *ALL
```

2. Change any information necessary. Press Enter. The 3 display is shown again. If you requested output to a printer, a system message is displayed when the report is printed.

To change a report

1. In the **Opt** field next to the sequence number of the report you want to select, type 2 and Press Enter. The Change Report Option display is shown.

```
                              Change Report Option

Company number . . . . . . . . :   999
Company name . . . . . . . . . :   Practice Co.
Validation company . . . . . . :   999
Option type  . . . . . . . . . :   SPM

Type choices, Press Enter.

Sequence . . . . . . . . . . . .    10
Description  . . . . . . . . . .   Print allocation by analyst
```

2. Change the sequence number or the description of the report, as needed. Press Enter. The Work with Report Options display is shown again. If you changed the report's sequence number, the report is now relocated to the new position. If you changed the report's description, the new description is shown.

To remove a report

1. In the **Opt** field next to the report or reports you want to delete, type 4 and Press Enter. The Confirm Remove of Options display is shown.

```
                          Confirm Remove of Options

  Press Enter to confirm your choices for 4=Remove.
  Press F12 to return to change your choices.

Opt Seq   Description                                          Type
 4  010   Print allocation by analyst                          USR
```

2. If you chose only one report to delete, Press Enter to remove the report from the database. If you chose more than one report to delete, press the F19 key to delete all the selected reports. The Work with Report Options display is shown again, but the list no longer contains the report or reports you just removed. Note that you cannot remove reports that have a report type of SPM. You can only remove reports with a type of USR.

To display a report's information

1. In the **Opt** field next to the report you want to display, type 5 and Press Enter. The Display Report Option display is shown.

```
                          Display Report Option

Sequence . . . . . . . . . . . . :    10
Option type  . . . . . . . . . . :   SPM
Description  . . . . . . . . . . :   Print allocation by analyst

Action . . . . . . . . . . . . . :   ?PRTANLSPM
```

2. Review the displayed information. Note that none of the information can be changed. When you are finished reviewing the information, press F3 to return to the Work with Report Options display.

Chapter 6 - System Controls

Escalating Entries

The Escalate Entries option allows you to increase the priority of all entries within a company. Before this option can have any effect, the **Escalate Entries** field must be set to **Yes** in the company you are working with.

When you escalate entries within a company, a report is automatically generated, showing you all entries' priorities both before and after the escalation process. You can then print this report, if desired.

To escalate an entry

1. At the Support/Manager main menu, type 4 and Press Enter. The System Controls display is shown.
2. Type 1 and Press Enter. The Escalate Entries display is shown as below.

```
                    Escalate Entries using SPM (ESCENTSPM)

Type choices, Press Enter.

Company number . . . . . . . . .                    *ALL, 001, 002...
Output . . . . . . . . . . . . .    *PRINT          *PRINT, *NONE
```

3. Type in the company you want to escalate entries for.
4. Choose whether you want the report printed out or written to a file.
5. Press Enter. The escalation is performed, and the System Controls display is shown again.

Evaluating Alternate Entry Views

The Alternate Entry Views option allows you to change the way the entries are displayed. The differences in the views are only in the order of the fields, not in the names of the fields.

You can look at each of the alternate views before choosing one. After you have looked at the options, you can select the view you want by using the Enter a View Selection option.

To change to an alternate entry view

1. At the Support Manager main menu, type 4 and Press Enter. The System Controls display is shown.
2. Type 2 and Press Enter. The Entry View Management display is shown.

```
SPMMENV                     Entry View Management

Select one of the following:

     1. Original Entry View
     2. Alternate Entry View #1
     3. Alternate Entry View #2
     4. Alternate Entry View #3
     5. Enter a View Selection
```

3. Type 1, 2, 3 or 4 to see the available view options. These view options are shown on the following page.
4. Type 5 and Press Enter. The Select an Entry View display is shown. This display shows you the currently selected company and the currently selected view.
5. In the **Option** field, type the number of the view you wish to use for this company, and Press Enter. The view you selected is used until you change it again with this option.

Selecting a Company to Work With

(See chapter 4 for more information on selecting a company.)

Working with Function Authorities

The Work with Function Authorities initial display lists all the possible functions in Support/Manager.

```
                        Work with Function Authorities

Company number . . . . . . . . .   999         1-999

Type options, Press Enter.
  2=Edit function authority

Opt    Function      Description
       *ADDENT       Add an entry
       *ANAL         Work with analysts
       *APPL         Work with applications
       *CHGTAG       Change field tags
       *CLRK         Clerks table file
       *COMP         Work with companies
       *CONT         Work with contacts
       *COOR         Work with coordinators
       *LOCN         Work with locations
       *MNGR         Managers table file
       *MSGF         Work with message files
       *NEWENT       New entry authorities
```

For each of these listed functions, the logged-in user can check to see if he or she has the authority to edit that function. The system administrator or another person with system authority can change the authority level of a user for a given function.

When a user checks the authority for a given function, Support/Manager first checks the user's authority at the highest system level, the user's profile. If the user has authority at that level, Support/Manager assumes authority at the Support/Manager level. If the user does not have authority at the user profile level, Support/Manager checks authority at the application level.

For more information on authorities and system security, see Chapter 1, "About Support/Manager," and the Support/Manager Quick Start Guide.

To check authority levels

1. At the Support/Manager main menu, type 4 and Press Enter. The System Controls display is shown.
2. Type 4 and Press Enter. The Work with Function Authorities display is shown, listing the various functions.

3. If necessary, use the Tab key to move the cursor to the Company number field and change the company you are working with.
4. Type 2 next to the function for which you want to check authority and Press Enter. The Edit . . . Authority display is shown. The actual display name depends on the function selected. The following example is for the authority to edit message files.

```
                             Edit Table Authority

 Company number . . . . . . . . . :  999
 Table name . . . . . . . . . . . :  *MSGF

 Description. . . . . . . . . . . :  Work with message files


 Type changes to current authorities, Press Enter.


 User        Authority  Display  Add  Update  Remove  Cpy  Aut
 *PUBLIC     *ALL          X      X     X       X      X    X
```

5. Check your authority. Most authorities are either ***USE**, indicating authority to edit the function, or ***EXCLUDE**, indicating that you do not have authority to edit the function. Some functions have more levels, such as the one shown above. See the F1 help screens for definitions of all the authority levels.
6. Press F12 to leave the Edit . . . Authority display and return to the Work with Function Authorities display.

To change authority levels

NOTE: You must have System Administrator or another high level of system security to perform this function.

1. At the Support/Manager main menu, type 4 and Press Enter. The System Controls display is shown.
2. Type 4 and Press Enter. The Work with Function Authorities display is shown, listing the various functions.
3. If necessary, use the Tab key to move the cursor to the Company number field and change the company you are working with.
4. Type 2 next to the function for which you want to change authority and Press Enter. The Edit . . . Authority display is shown. The actual display name depends on the function selected.
5. Change the authority level for the appropriate user. Most authorities are either ***USE**, indicating authority to edit the function, or ***EXCLUDE**, indicating that you do not have authority to edit the function. Some functions have more levels, such as the one shown above. See the F1 help screens for definitions of all the authority levels. **NOTE**: If you need to add a user, see “Adding a User” below.
6. Press F12 to leave the Edit . . . Authority display and return to the Work with Function Authorities display.

To add a user

1. At the Support/Manager main menu, type 4 and Press Enter. The System Controls display is shown.
2. Type 4 and Press Enter. The Work with Function Authorities display is shown, listing the various functions.
3. If necessary, use the Tab key to move the cursor to the Company number field and change the company you are working with.

4. Type 2 next to the function for which you want to change authority and Press Enter. The Edit . . . Authority display is shown. The actual display name depends on the function selected.
5. Press F6. The Add New Users display is shown.

```
                                 Add New Users

Company number . . . . . . . . . :  999
Table name . . . . . . . . . . . :  *MSGF

Description. . . . . . . . . . . :  Work with message files


Type new users, Press Enter.


User        Authority  Display  Add  Update  Remove  Cpy  Aut
```

6. Type in the new user's name and specify the authority level(s). Press Enter. Note that the user must be set up with a system-level user profile before Support/Manager will accept the entry. The new user is added, and the Edit . . . Authority display is shown again.

Changing Entry Authority

The Change Entry Authority function allows a system administrator or another person with system authority to change a user's authority to work with entries.

User entry authority can be specified for a given entry or for all entries, and within a given company or within all companies. Note that a user must have a system-level user profile before Support/Manager will accept the entry authority change.

To change entry authority

1. At the Support/Manager main menu, type 4 and Press Enter. The System Controls display is shown.
2. Type 5 and Press Enter. The Change Entry Authority display is shown.

```
                      Change Entry Authority (CHGAUTSPM)

Type choices, Press Enter.

Company number . . . . . . . . .   *ALL          *ALL, 001, 002...
               + for more values
Entry number . . . . . . . . . .   *ALL          1-9999999, *ALL
               + for more values
User . . . . . . . . . . . . . .                 Name, *PUBLIC
Authority  . . . . . . . . . . .                 *ALL, *CHANGE, *USE...
Print audit report . . . . . . .   *YES          *YES, *NO
```

3. Specify a company and/or entry, and then specify the user name and authority level.
4. If you want a report showing the entry authorities before and after your change, set the **Print Audit Report** field to **Yes**. Otherwise, set it to No.
5. Press Enter. The user's entry authority is changed, and the System Controls display is shown again.

Displaying the Current Release Information

The Display Current Release option displays the current release information for Support/Manager. This information is displayed in a pop-up box on the System Controls menu display. This is a read-only display; you cannot change the release information.

To display current release information

1. At the Support/Manager Main Menu, type 4 and Press Enter. The System Controls display is shown.
2. Type 6 and Press Enter. The Support/Manager release information is displayed.

```
 ......................................
 :                          MBABKY    :
 :      Support/Manager               :
 :                                    :
 : Current Release . . 1.1            :
 :                                    :
 :                                    :
 :  F12=Cancel                        :
 :                                    :
 :....................................:
```

3. Press the F12 key to return to the System Controls display.

Appendix A –
Field Descriptions

A

Activity Code
An entry's status. Possible options are *OPEN, *CLOSED, *HELD, or *INACTIVE.

Action
A standard AS/400 command that you want to associate with a table group. This command is executed when you select the table group from within the Work With Table Options display.

Actual Completion Date
The date that the entry is resolved for the entry that you are adding or changing. Dates are entered in either MMDDYY, YYMMDD or DDMMYY format. The format for dates is specified by company in the Company table.

Actual Completion Time
The time that the entry is resolved for the entry that you are adding or changing. Times are entered in HHMM format.

Address Lines
The address lines for the company that you are adding or changing. You can specify up to three address lines.

Administrator
The user ID for the person who will serve as Support/Manager administrator for entries input for this company.

Allocation by Analyst Report
A report listing entries allocated to each analyst.

Analyst
The person assigned to resolve the problem or request.

Application
The name of the application for the entry that you are adding or changing. If you want to select an application from a list of applications, place the cursor within the Application field and press F4. If you know the application abbreviation, you can type this into the Application field and the full application name will be displayed in the Application field when you press Enter.

Application Abbreviation
The specified abbreviation for an application.

Application Long Name
A description of the application.

Application Short Name
The title or name of the application.

Assigned Date
The date that the entry was assigned to the analyst specified in the Assigned To field for the entry that you are adding or changing. Dates are entered in either MMDDYY, YYMMDD or DDMMYY format. The format for dates is specified by company in the Company table.
Assigned Time
The time that the entry was assigned to the analyst specified in the Assigned To field for the entry that you are adding or changing.

Assigned To
The name of the assigned analyst for the entry that you are adding or changing. If you want to select an analyst from a list of analysts, place the cursor within the Assigned To field and press F4. If you know the analyst initials, you can type these into the Assigned To field and the full analyst name will be displayed in the Assigned To field when you press Enter.

Authority
The authority given to any individual user to add, change, copy, remove, or display information. Authority is assigned first at the AS/400 system level, and then at the Support/Manager level.

B

Beginning Date
Related to Down Time. The date that the downtime associated with the entry began.

Beginning Time
Related to Down Time. The time that the downtime associated with the entry began.

Business Phone (compare to Work Phone)
A business telephone number of the person identified in one of the tables as an operator, analyst, contact, clerk, manager, secretary, or coordinator. This is the same as the Work Phone.

C

Cause
The name of the cause for the entry that you are adding or changing. If you want to select a cause from a list of causes, place the cursor within the Cause field and press F4. If you know the cause abbreviation, you can type the abbreviation into the Cause field and the full cause name will be displayed in the Cause field when you press Enter.

Cause Long Name
A description of the cause.

Clerk Name
The name of the clerk for the entry that you are adding or changing. If you want to select a clerk from a list of clerks, place the cursor within the Clerk Name field and press F4. If you know the clerk initials, you can type these into the Clerk Name field and the full clerk name will be displayed in the Clerk Name field when you press Enter.

Company Name
The currently selected company name.

Company Number
The number of the company you have chosen to work with.

Contact name
The name of the person who reported the entry that you are adding or changing. If you want to select a contact from a list of contacts, place the cursor in the Contact name field and press F4. If you know the contact's initials, you can type these into the Contact field name, and the full contact name will be displayed when you press Enter.

Contact Long Name
A long description of the contact.

Contact Short Name
A 20-character name for the contact.

Coordinator
The name of the coordinator for the entry that you are adding or changing. If you want to select a coordinator from a list of coordinators, place the cursor within the Coordinator field and press F4. If you know the coordinator initials, you can type these into the Coordinator field and the full coordinator name will be displayed in the Coordinator field when you press Enter.

Coordinator Report
A report by coordinator showing basic entry information, including job number, short entry description, location, and severity code.

Coordinator Status Report
A report by coordinator and severity code listing entries. It shows the entry date, short entry description, location, and contact information.

D

Date Contacted
The date that the entry was reported. The current date is the default when you come to the Add Entry display. You can leave this date as the date the entry was reported or change it to a more appropriate date.

Date Entered
The date that the entry was logged into the system. The current system date is displayed when you add an entry. You can change the date or leave the current date.

Date Format
The format used for displaying and printing date information for this company. The possible values are:
- MDY: Specifies that dates are displayed or printed in Month/Day/Year format.
- YMD: Specifies that dates are displayed or printed in Year/Month/Day format.
- DMY: Specifies that dates are displayed or printed in Day/Month/Year format.

Description
The description of the groups on the Work with . . . displays. This description can be changed.

Development Request ID
Specifies a particular action item you want to associate with this entry, such as a system maintenance request, a work order number, and so on. You can type in up to 10 characters in any combination of letters, numbers and spaces.

Down Time (compare to Scheduled Down Time)
For the entry that you are adding or change, the number of hours of down time that the entry caused.

<u>**E**</u>

Editing Flag
Indicates which tables are used for data validation while adding and changing entries for a company. All tables are listed on the display so the user can selectively specify which tables are used. The possible values are:

> Y: Specifies that the table is used for data validation while adding and changing entries for this company.
> N: Specifies that the table is not used for data validation while adding and changing entries for this company.

If left blank the field will default to "Y".

Elapsed Time
The total time between the beginning of the down time and the end of the down time.

Enable Escalation
Indicates whether entries input for this company can be escalated based on criteria listed in this company's Severity Code table. The possible values are:

> Y: Specifies that entry escalation is enabled for this company.
> N: Specifies that entry escalation is not enabled for this company.
> Note: Escalation is performed with the ESCENTSPM command on any command line or in a user CL program.

Ending Date
Related to Down Time. The date that the down time associated with the entry ended. Dates are entered in either MMDDYY, YYMMDD or DDMMYY format. The format for dates is specified by company in the Company table.

Ending Time
Related to Down Time. Specify the time that the down time associated with the entry ended that you are adding or changing. Times are specified in HHMM format.

Entry
The number assigned by the system to the selected entry.

Entry Authority
The authority given to the user for each entry. Possible options are Change, Display, Remove, and Copy.

Entry Search Name
The name of the search you have defined with the search criteria you are wanting retrieved. If you enter *NONE you will be prompted to create a new search.

Entry Status
See Activity Code.

Entry Status Report
A report by entry number showing the status of each entry. Possible options are *OPEN, *CLOSED, *HELD, or *INACTIVE.

Entry Type
The name of the entry type for the entry that you are adding or changing. If you want to select an entry type from a list of entry types, place the cursor within the Entry Type field and press F4. If you know the entry type abbreviation, you can type it into the Entry Type field and the full entry type name will be displayed in the Entry Type field when you press Enter.

Escalation
The process of increasing the severity code of an entry.

Estimated Completion Date
The date that you expect to have the entry resolved for the entry that you are adding or changing. Dates are entered in either MMDDYY, YYMMDD or DDMMYY format. The format for dates is specified by company in the Company table.

Estimated Completion Time
The time that you expect to have the entry resolved for the entry that you are adding or changing. Times are entered in HHMM format.

Extended Roll Value
The number of lines to roll the screen when viewing extended entry descriptions and resolutions for this company. Roll values can range from 1-14. The default value is 5 lines.

F

From Completion Date
The date used in searches to select specific entries with completion dates greater than or equal to this date.

From Entry Date
The date used in searches to select specific entries with entry dates greater than or equal to this date.

Function Authority
Specific authority given to users to perform certain tasks, such as working with tables.

Function Name
The name of a function used to perform specific tasks, such as add entries or work with tables.

G

Group Name
The name of table groups, such as operators or companies.

H

Help Desk Operator
The name of the operator for the entry that you are adding or changing. If you want to select an operator from a list of operators, place the cursor within the Operator field and press F4. If you know the operator initials, you can type these into the Operator field and the full operator name will be displayed in the Operator field when you press Enter.

I

Indication
The name of the indication for the entry that you are adding or changing. If you want to select an indication from a list of indications, place the cursor within the Indication field and press F4. If you know the indication abbreviation, you can type this into the Indication field and the full indication name will be displayed in the Indication field when you press Enter.

Indication Long Name
A description of the indication.

Initials
The abbreviation of a person's formal name or the person's initials. For example, Bill David Jones' initials would be BDJ.

J

Job Description
Specify the job description or the job number for the entry that you are adding or changing.

Job Number
The job number associated with the entry that you are adding or changing.

L

Last Entry Number Assigned
The starting point for automatic numbering of entries input for this company. Numbers assigned to any new entries input for this company will be incremented by '1' and will be greater than the last number used. Entry numbers are unique within company; therefore, two companies can use the same entry number for different entries.

Late Report
Specify whether or not reports were late as a result of down time for the entry that you are adding or changing. The possible values are:

- Y: Specifies that reports were late as a result of down time.
- N: Specifies that reports were not late as a result of down time.

Level Code
A code for the area where the entry is resolved.

Level Long Name
A description of the level code.

Library
A directory of objects, such as files and programs, that reside together.

Location (of company)
The location for the company that you are adding or changing. This information is in addition to the address of the company. For instance you could specify East Building or 4th Floor.

Location (of entry)
The name of the location for the entry that you are adding or changing. If you want to select a location from a list of locations, place the cursor within the Location field and press F4. If you know the location abbreviation, you can type these into the Location field and the full location name will be displayed in the Location field when you press Enter.

Location Abbreviation
A location code associating the entry to a specific area such as a data processing center or accounts receivable.

Location Summary Report
A report by location showing entries for each status code.

M

Manager Name
The name of the manager for the entry that you are adding or changing. If you want to select a manager from a list of managers, place the cursor within the Manager Name field and press F4. If you know the manager initials, you can type these into the Manager Name field and the full manager name will be displayed in the Manager field when you press Enter.

Maximum Extended Lines
Specifies the maximum number of lines for extended entry and resolution descriptions for this company. Maximum number of lines is 999. The default number of lines is 99.

Message File
Identifies message files for the entry. These files are used to search for message IDs.

Message ID
The message ID that is associated with the entry that you are adding or changing. If you want to see first and second level text for the entry, place the cursor within the Message ID field and press F4. The first and second level text that is displayed comes from the message queue file name(s) that you specify in the Message File Name field in the Work with Message Files display.

Message Queue
Specifies the name of the message queue that will receive messages when an entry is assigned for the company. If the Library and Message queue fields are left blank, no message will be sent to the company when an entry is assigned.

Miscellaneous Information
Anything the user want's to enter that is pertinent to the table.

Monthly Status Report
A 12-month report showing, by month, the status codes and number of entries for each status code.

Morning Report
A daily report showing entries with detail information about each entry.

N

Network User ID
The user's profile name.

Next Higher Severity Code
One number less than the number in the entry record. The highest severity code is one. If an entry is escalated, it is moved to the Next Higher Severity Code.

Notes
Anything the user wants to enter about an entry. These will print as comments in the morning report.

O

Operator
The name of the operator for the entry that you are adding or changing. If you want to select an operator from a list of operators, place the cursor within the Operator field and press F4. If you know the operator initials, you can type these into the Operator field and the full operator name will be displayed in the Operator field when you press Enter.

Option
The operation you want to perform on the corresponding group. You can type the same option next to more than one group at a time, and you can also type different options next to different groups at the same time.

Option Type
The option type for a table group. If you are adding a table group, this type is USR. This is browse-only field.

Output
The type of output you want for the task you are performing. If you enter * in this field the information will be displayed online. If you enter *PRINT a report will be printed listing the specific entries. If you enter *OUTFILE a file will be created with the entries. If you enter either *PRINT or *OUTFILE you will be prompted to run the program interactively or in batch.

P

Print Reports
Indicates whether or not the company will be included in reports that are run nightly (i.e., Morning Report, Entry Status, and Resource Allocation Report). All companies that are flagged with a "Y" will be included in the report(s). The programs that run each report are:

SPMCMRPT: Morning Report
SPMCRRPT: Resource Allocation Report
SPMCSRPT: Entry Status Report

The possible values are:

Y: Specifies that the company will be included in reports that are run nightly.
N: Specifies that the company will not be included in reports that are run nightly.
Note: The user can run these reports on demand in various optional sequences.

Product Long Name
A description of the product.

Product Type (for an entry)
The name of the product type for the entry that you are adding or changing. If you want to select a product type from a list of product types, place the cursor within the Product Type field and press F4.

Q

Queue
A system area where jobs are stacked to run or to print.

R

Report Name
The heading used on Support/Manager reports and displays related to this company. The heading is automatically centered in the field when you press Enter. If the Report name field is left blank, the company name will be automatically inserted and centered in this field.

Resolution Level
Specify the resolution level code for the entry that you are adding or changing. If you want to select a resolution code from a list of resolution codes, place the cursor within the Resolution code field and press F4. Resolution level codes represent the area where the entry is resolved such as Help Desk, analyst or coordinator.

Resource Allocation Report
A report showing entries and the resource allocated to each entry.

Roll Value
A numeric value used to roll the screen a certain number of lines.

S

Scheduled Down Time (compare to Down Time)
Indicates whether or not down time is associated with the entry that you are adding or changing. The possible values are:

S: Specifies that down time associated with this entry was scheduled.
U: Specifies that down time associated with this entry was not scheduled.
blank: Specifies that there is no down time associated with this entry.

Secretary Name
Specify the name of the secretary for the entry that you are adding or changing. If you want to select a secretary from a list of secretaries, place the cursor within the Secretary Name field and press F4. If you know the secretary initials, you can type these into the Secretary Name field and the full secretary name will be displayed in the Secretary Name field when you press Enter.

Sequence
The sequence number of the group. The sequence number defines the display order of groups in a list. Groups are listed in descending numerical order. Changing the sequence number of any group moves it higher or lower on the list.

Serial Number
An identification number of computer equipment.

Severity Code
Specify the severity code for the entry that you are adding or changing. If you want to select a severity code from a list of severity codes, place the cursor within the Severity Code field and press F4.

Severity Long Name
A description of the severity code.

Short Entry Description
A short description for the entry that you are adding or changing. If you need to add more lines of description, press F10 to go to the Work with Extended Entry Description display. You can enter up to 999 lines of additional information describing the entry. When extended text is used a "+" is displayed at the end of the Short Entry Description field.

Short Resolution Description
Specify a short resolution for the entry that you are adding or changing. If you need to add more lines of resolution, press F10 to go to the Work with Extended Entry Resolution display. You can enter up to 999 lines of additional information describing the entry resolution. When extended text is used a "+" is displayed at the end of the Short Entry Resolution field.

SPM Administrator
The person who will serve as the Support/Manager administrator for entries logged into the system.

Submit
To send the job to batch to run.

T

Table Editing Flags
See Editing Flags.

Table Type
Indicates the table you want to use for a specific task, such as printing. The possible values are:

*COMP: Specifies the company table for the specified company.
*OPER: Specifies the operator table for the specified company.
*PTYP: Specifies the product type table for the specified company.
*ANAL: Specifies the analyst table for the specified company.
*COOR: Specifies the coordinator table for the specified company.
*TYPE: Specifies the entry type table for the specified company.
*PIND: Specifies the entry indication table for the specified company.
*PCAU: Specifies the entry cause table for the specified company.
*LOCN: Specifies the location table for the specified company.
*APPL: Specifies the application table for the specified company.
*CONT: Specifies the contact table for the specified company.
*MSGF: Specifies the message file table for the specified company.
*RLVL: Specifies the resolution level table for the specified company.
*SVRT: Specifies the severity code table for the specified company.
*MNGR: Specifies the manager code table for the specified company.
*CLRK: Specifies the clerk code table for the specified company.
*SECR: Specifies the secretary code table for the specified company.

Template Company
The preloaded Practice Company that comes with Support/Manager. You can use this company to learn Support/Manager functions or to help establish your own companies.

Time Contacted
The time that the entry was reported. The current time is the default when you come to the Add Entry display. You can leave this time as the time the entry was reported or change it to a more appropriate time. Times are entered in HHMM format.

Time Entered
The time that the entry was logged. The current system time is displayed when you add an entry. You can change the time or leave the current time.

To Completion Date
A date used in searches to select specific entries with completion dates less than or equal to this date.

To Entry Date
A date used in searches to select specific entries with entry dates less than or equal to this date.

Type
The type of group on the Work with . . . displays. A group can be of the type USR or SPM. Entry groups of the type USR are user-defined and can be removed. Entry groups of the type SPM cannot be removed.

V

Validation Company
The validation company associated with the currently selected company. The validation company is used by Support/Manager to confirm tables and entries. This is a browse-only field.

W

Work Phone (compare to Business Phone)
A business telephone number of the person identified in one of the tables as an operator, analyst, contact, clerk, manager, secretary, or coordinator. This is the same as the Business Phone.

Appendix B – Product Installation and Security

Overview

During installation, all commands and menus are copied into library QGPL. Those objects will have the current object authority. This is done to enable the user to run any Support/Manager command without having Support/Manager in the library list.

Common Files and Menus

Below is a list of the most common files and menus:

PMSTR	Entry master
PCNTL	Company master
PACAU	Entry cause file
PBTYP	Entry type file
PDEPT	Location file
PGASN	Assigned analyst file
PHMCH	Product type file
PINDC	Indication type file
PNCRD	Coordinator file
POPTR	Operator file
PTACT	Contact file
PVLVL	Resolution level file
PYSVR	Severity code file
SPMACLK	Clerk file
SPMAMGR	Manager file
SPMASEC	Secretary file
SPM	Main menu
SPMMENT	Entry management menu
SPMMENV	Entry view management
SPMMRPT	Report menu
SPMMSYS	System controls menu
SPMMTBL	Tables menu

Installing Support / Manager

Whether you are installing Support/Manager for the first time or reinstalling, the instructions are the same. The program will install the product for you. This process should be done with a user with *ALLOBJ authority, such as the QSECOFR.

NOTE: Before reinstalling a new release, be sure to make a backup copy of your current Support/Manager system (library SUPTMGR). This will offer protection in the event that a reinstall is not successful.

First Installation — CD

1. Load CD into the CD-ROM drive

2. Enter the following command: ***LODRUN DEV(*OPT)***
3. The CD-ROM product installation menu is displayed. To install Support/Manager, please enter a 1 beside Support/Manager.
4. The product information will automatically be installed.
5. Use the command GO SPM to access the Support/Manager Main Menu.

First Installation — Tape

1. Load tape in the appropriate drive
2. At the command line type: ***RSTLIB SAVLIB(MBAINST) DEV****(device name)*
3. Execute the install command:

   MBAINST/MBAINST PRODUCT(SPM) ACTION(*INSTALL) DEV*(device name)*
4. Use the command GO SPM to access the Support/Manager Main Menu.

Upgrade

1. Back-up your current Support/Manager system (library SUPTMGR).
2. Follow steps for the proper media format above.

   NOTE: If you are upgrading to a new system, you will need to restore the old product library on the new system before proceeding with step 1.

Removing Support / Manager

To remove the Support/Manager and/or the customer support products from your AS/400, enter the following commands:

MBAINST/MBAINST PRODUCT(ACS) ACTION(*REMOVE) RMVINST(*NO) 8 **(Enter)**
MBAINST/MBAINST PRODUCT(SPM) ACTION(*REMOVE) RMVINST(*YES)

NOTE: If you have Job/Manager or any other MBA product on you AS/400, you may choose not to remove the Automated Customer Support product from your system. If this is the case, skip the first command string.

NOTE: No users can be using Support/Manager while this command is executing.

Updating a Trial Copy

Option 60 (Update product security) is a special option that only appears when the product is in the trial mode.

To extend your trial copy of Support/Manager, contact your Account Manager at MBA Inc. (918) 587-1500. You should have your CPU serial number available when you call. If you do not know the CPU serial number, you can go to a command line and type in the command DSPSYSVAL QSRLNBR, which will return your CPU serial number.

When your Account Manager has the serial number, he or she can generate a code that will extend the trial on your machine. This code is entered in the field provided on the AS/Manager Product Family Internal Update display (Option 60).

NOTE: This procedure is also followed to make Support/Manager a permanent product or to provide an upgrade when your CPU is upgraded to a higher-level AS/400.

Appendix C –
Product Warranty and Support

Overview

This section contains important warranty and product support information. Please read it carefully.

Worldwide Product Support

MBA support offers you a wide range of choices and access to high-quality, responsive technical support. Support/Manager has been thoroughly tested and comes with online help text as well as user documentation. Displays are simple to understand and use.

When you have a question

1. Check the online help text.
2. Consult the Support/Manager documentation and other printed information included with Support/Manager.
3. Consult electronic options using AS/Manager Customer Support (ACS). This is accessed by option 30 from the main menu. This will allow you to:

   - Display answers to commonly asked questions using the Q&A database
   - Send a message to Technical Support
   - Page a Technical Support person in Emergency situations

When calling AS/Manager Support, you should be at your computer and have documentation at hand. Be prepared to give the following information:

- The version of Support/Manager that you are using
- The version of OS/400 you are using
- The exact wording of any messages that appear on your screen along with the message ID
- A printout of the joblog when the problem occurred
- A description of what happened and what you were doing when the problem occurred
- A description of how you tried to solve the problem

Product Warranty and Maintenance

MBA warrants that Support/Manager software will be free of defects for 90-days after software installation. Product technical phone support and replacement materials will be provided during this time at no charge.

Annual maintenance agreements may be purchased by licensed users as shown on the AS/Manager license agreement and current price schedule for ongoing Support/Manager support after the initial 90-day free warranty period. Payment of this fee entitles you to continuing technical support, product enhancements, problem corrections, and new releases of Support/Manager.

Even though MBA has thoroughly tested the Support/manager software and documentation and reviewed their contents, MBA and its distributors make no warranties, either express or implied, with respect to Support/manager software and documentation, their merchantability, or their fitness for any particular purpose. The Support/manager software and documentation are distributed solely on an "as is" basis.

The entire risk as to their quality and performance is with the customer. MBA and its distributors will not be liable for direct, indirect, incidental or consequential damages resulting from any defect in the Support/manager software or manual.

Appendix D – Remote Customer Support

Overview

AS/Manager Customer Support (ACS) is designed to permit remote user access to the MBA customer support AS/400. This product is offered at no charge to customers who are under a software maintenance license agreement. It provides menu screens to assist you in defining ACS connectivity to the MBA customer support machine and in ordering any necessary enhancements or corrections (PTFs) to MBA software products. ACS is automatically installed at Support/manager installation time.

ACS allows you to:

- Order PTFs for any AS/Manager product
- Send a message to technical support
- Page a technical support representative for emergencies
- Ask questions or search for answers on Q&A database

To access ACS

AS/Manager Customer Support is provided as a service to our valued customers in order to assure the highest level of support. If you are interested in purchasing the product for your own PTF distribution requirements, call us and we will provide additional information.

To access ACS, choose Option 30 from the Support/Manager Main Menu or enter the command GO ASM from a command line. This will take you to the AS/Manager Customer Support menu.

AS/Manager Customer Support Menu

The ACS system is designed to allow you to quickly and easily download program temporary fixes from the AS/Manager system to your system. This will allow fixes to be requested quickly without any delays waiting for distribution media shipments. Also support is provided to allow display station passthru for an AS/Manager technical support person to sign-on you machine to assist in problem solving or just to help with any questions you might have. All access is instigated by you. AS/Manager will never have the authority or the phone number to access your system.

Whenever PTFs are downloaded, accompanying documentaion will be printed giving complete instructions on how to install any fix.

```
ASM                            AS/Manager Customer Support

Select one of the following:

     1. Order PTF's from AS/Manager
     2. Sign on AS/Manager to ask questions or send message

     3. Configure communication for support

                                          Thanks for using electronic support

                                              Support: (918) 587-1500
                                              Fax:     (918) 587-1526
```

```
Selection or command


===>
```

Options

Option 1: This option allows you to order PTFs for all AS/Manager products. Simply enter the PTF ID supplied by AS/Manager technical support or the ICMSUMMARY. The PTF will be transferred to your machine and will be accompanied by a report highlighting the PTF and giving instructions on how to load it.

Option 2: This option connects you to MBA's AS/Manager support system.

Option 3: This option allows you to configure your communications support to access ACS. This process must be completed before you can access ACS.

PTF Retrieval

This option allows you to order PTFs for all AS/Manager products. Simply enter the PTF ID supplied by AS/Manager technical support or the ICMSUMMARY. The PTF will be transferred to your machine and will be accompanied by a report highlighting the PTF and giving instructions on how to load it.

```
                         AS/Manager PTF Retrieval


Type options, press Enter.

    PTF Identifer . . . . . . . . . .

    Company Name  . . . . . . . . . .
    Contact Name  . . . . . . . . . .
    Telephone Number  . . . . . . . .
```

Some important fields for this display include the following:

- **PTF ID**: The ID of the PTF that you want to download. This is provided to you by AS/Manager technical support.
- **Customer information**: Enter your company name, contact name and telephone number. A message will be displayed at the bottom of the screen giving the status of the transfer operation. To view a summary of all available PTF's for ICOM/400, enter ICMSUMMARY in the PTF ID.

Sign-on to AS/Manager Support System

You can perform the following support functions:

- Send a message to technical support.
- Page a technical support representative.
- Ask questions or search for answers on Q&A database.

Note: Your page will not be sent until you sign off ACS.

```
                    Sign on to AS/Manager Support System


Press Enter to continue.


   Beginning passthru to AS/Manager. When signon appears enter:

   Userid: SUPPORT       Password: SUPPORT
```

AS/Manager Communication

This option allows you to configure your communications support to access ACS. This process must be completed before you can access ACS.

```
                   AS/Manager Communication Configuration

Type options, press Enter.


     Line Resource Name  . . . . . . .  CMN01
     Line Speed  . . . . . . . . . . .  2400
     AS/Manager Dial in Number . . . .  SST19185876923
```

Some important fields for this display include:

- **Line resource name**: This is the name of the AS/400 line resource used to access ACS. It will normally be LIN011. This line has to be in synchronous mode when using ACS. If your not sure of your line resource name, enter DSPLIND QESLINE on a command line and use the "Resource name" value returned as the line resource name.
- **Line speed**: This is your communication speed. The default is 2400 baud. This value should not go above 2400.
- **AS/Manager Dial-in Number**: This is the MBA ACS phone number. If you are using a PBX system your string should be similar to "SST9,,19185876923' (the first 9 is the value to get an outside line; yours may be different).

Once all values are correct, press Enter. This will create a line (ASM$LINE), a controller (ASM$CTL) and a device (ASM$DEV). The user should not vary these objects on. The order process will vary them on during the procedure and off at the end. You must ensure that no other lines are varied onto the resource that you name for this line. In most cases the screen can be used with the provided defaults.

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