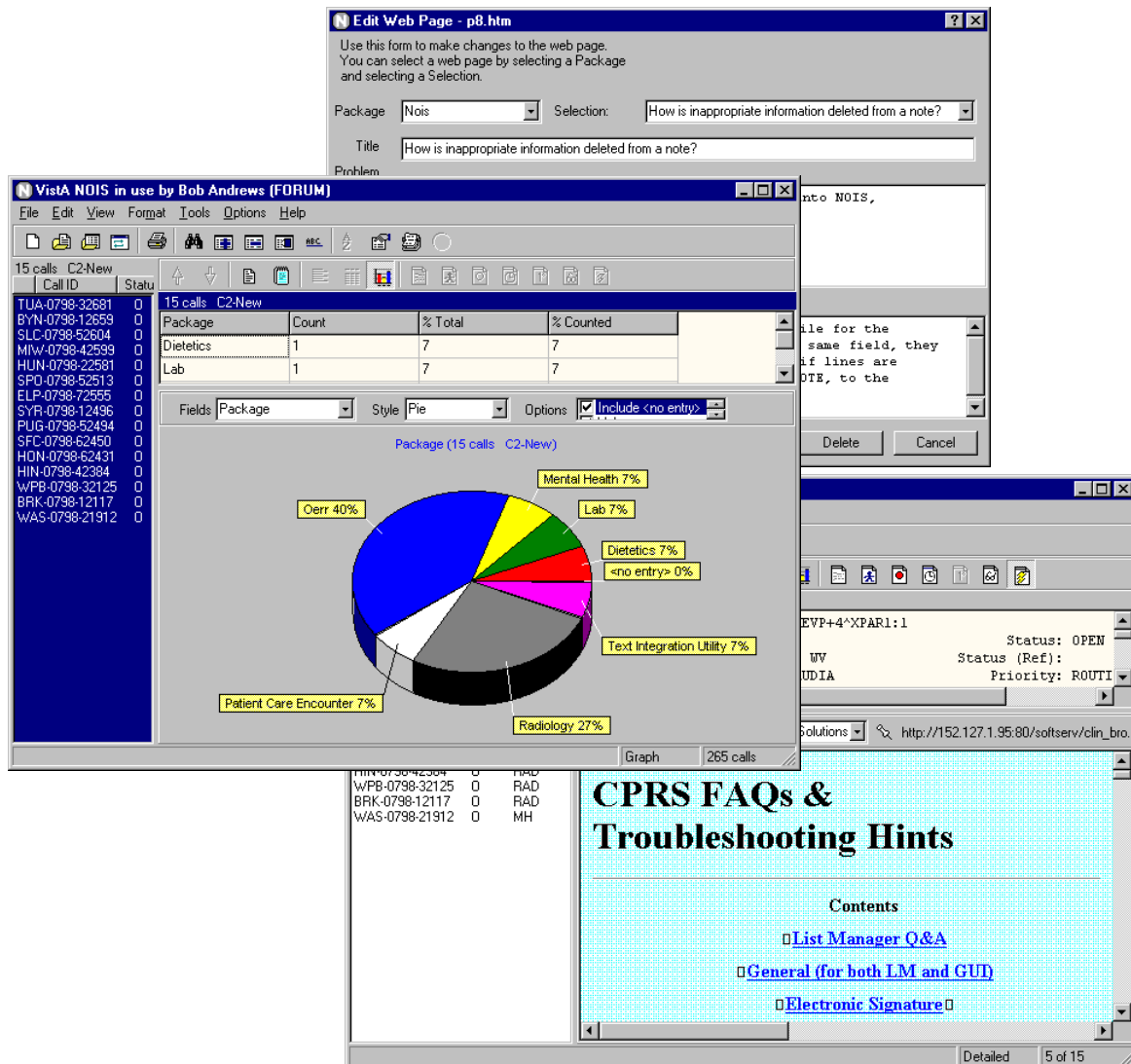


NOIS

Department of Veterans Affairs National Online Information Sharing Training Examples



Support Specialist

Introduction — Support Specialist

These training examples represent common tasks performed by NOIS Specialists who support software and hardware. For NOIS on Forum, this includes Customer Service. For NOIS installed at a local site, the Specialists may include IRMS, ADPACs, anyone who resolves reported problems.

As a NOIS Specialist you can edit calls. You can close and cancel any call, You can refer calls for additional assistance. You can also create batch edit, associate calls as duplicates, and create and edit web pages. You can use User Defaults (using List Manager to edit your defaults). You can also do anything a general user of NOIS can do (which is actually a whole bunch of stuff). If you need help with NOIS, contact a NOIS Coordinator. To see who is a NOIS Coordinator, use the NOIS menu on Forum for File Setup, enter SPEC and sort by NOIS Coordinator.

The examples here all relate to using the GUI. The only things you can't do with the GUI are User Defaults, Define a List, and File Setup.

Benefits

The benefit of NOIS is that you can track and organize reported problems. You can also review previous problems to search for potential solutions. NOIS allows you to communicate by leaving notes on calls when it is more convenient or you are unable to contact the site. This is also true for your customer. It provides additional information related to the request such as information on software, patches, installations, and contacts. It allows you to work in a geographically distributed team organization. Hopefully it provides better service to the customer.

Common Lists

Look at the **File menu, Most Recently Used menu**; these are the last lists that you've used. If you haven't used the lists below, look them up. Use **File menu, Select List** to get the **Select NOIS List** form. Make sure **Common** is selected, and **choose a list**. You may have to enter a **Specific entry**. Experiment restricting your list entries. Notice how your Most Recently Used menu changes.

Team Lists:

There are lists for support teams (these are groups of packages): C1, C2, DSM, Exchange, FM, Imaging, MCM, MISS, Oper, PIM, Tech, Tele. Examples for the Clin 2 team:

C2-New
C2-Open
C2-
C2-Refer

You can also use these lists and enter a package group.

Package Group, Open: <package group>
Package Group: : <package group>
Package Group, Refer: : <package group>

Lists by Specialist:

You need to enter a specialist (usually yourself).

Specialist, Open: <specialist>
Specialist: : <specialist>
Specialist, Refer: <specialist>

Lists by Package:

Enter the name of the module/version# or package.

Module/#, Open: <module/version#>
Module/#: < module/version#>
Module/#, Referred: < module/version#>
Package, Open: <package>
Package: <package>
Package, Referred: <package>

Other lists:

MRA: <person>	last alerts processed
MRE: <person>	last edited calls
Site: <location>	all calls from this site
Site, Not Closed: <location>	all unresolved calls from this site
All New	all unclaimed calls

Editing Calls

1. Log a New Call

Use **File menu, Log a New Call** to bring up the New Call form. Fill out the entries on the form and click the Save button. The new call is now displayed. Now look at the File menu, Most Recent Edited menu to see that this is the last call you edited.

2. Edit a Call

Select the call you want to edit. Use **Edit menu, Edit Call** to bring up the Edit Call form. Click on the notes tab. Browse to another call on the main form. Note that you get a warning that you are viewing a different call than the one you are editing. Copy some text from the call you are viewing and paste it as a note on the call you are editing (use your right mouse button, or simply drag and drop the text). Spell check the new entry (use the right mouse button). Save the call.

3. Make a Note

Select the call you want to edit. Use **Edit menu, Make a Note** to bring up the Make a Note form. Enter some text. Paste in a common response (use your right mouse button). **Note:** if you don't have any common responses defined — cancel the Make a Note form and use the **Options menu, Define Responses** to add a common response — then make a new note and paste your response.

4. Edit Personal Fields

Select the call you want to edit. Use **Edit menu, Edit Personal Fields** to bring up the Edit Personal Fields form (you can also Edit Call form). Make some entries and click the Save button

5. Batch Edit some calls

Use **Edit menu, Batch Editor** to bring up the Batch Editor form). Make some entries and click the Save button. You are now presented with the Apply Batch Edits form. Review the edit information you have made and select the calls you will apply the edits to. Click the Apply button to make the changes or click Cancel to go back to the Batch Editor.

6. Associate a Call as a Duplicate

Select the call you want to make a duplicate. Use **Edit menu, Associate Call** to bring up the Associate Call form. Select a call in the list that is the duplicate. If the call is not on the list, look up the call. Click the OK button to make the association.

7. Use the Duplicate Editor

Use **Edit menu, Duplicate Editor** to bring up the Duplicate Editor form. Experiment with using the buttons and right mouse clicks. Drag and drop calls onto other calls. Notice how the primary call changes. Only save changes if you are sure these calls are duplicates; otherwise, exit.

Reviewing Calls

- 1. Select a list of calls (restrict it to 5 entries)**
Use **File menu, Select List**. Select a list. Under Restrictions, select **Last # of calls** and enter 5. Click OK.
- 2. Display all the calls in Detailed format**
Use **Format menu, Change Format**. Under View, select **All calls in list**. Under Styles, select **Detailed**. Click OK.
- 3. Display all calls in Brief format**
Use **Format menu, Change Format**. Under View, select **All calls in list**. Under Styles, select **Brief**. Click OK.
- 4. Display a Fields format on all calls for the fields Module and Location**
Use **Format menu, Change Format**. Under View, select **All calls in list**. Under Styles, select **Fields**. Clear the fields in display by clicking the << button. Select the field Module/Version and click the > button (you could also just double click). Select the field Location also. Click OK.
- 5. Display a Table format on all calls using a selected format**
Use **Format menu, Change Format**. Under View, select **All calls in list**. Under Styles, select **Table**. Under Format, select Public and choose a format from the drop-down list. Click OK.
- 6. Display a Statistics format on all calls for Module and Location**
Use **Format menu, Change Format**. Under View, select **All calls in list**. Under Styles, select **Statistics**. Select fields (as described in #4). Click OK.
- 7. Display the same Statistics format and collate by Module**
Use same instructions as #6, except also select Module/Version from the **Collate by** drop-down list.
- 8. Save a personal format that has fields and use it to display all calls in a Fields format**
Use **Format menu, Change Format**. Under View, select **All calls in list**. Under Styles, select **Table**. Clear the fields in the display by clicking the << button. Select the fields you would frequently use. Order the fields using the v or ^ buttons. Click the Define button and type in a name for this format. Click the New button. Now, under Formats when select Personal, you can make this selection. Click OK
- 9. Change back to a standard format**
Use **Format menu, Standard Format**. The display goes back to a detailed format on a single call.
- 10. Sort calls on the list by site by clicking the list header**

Click a title on the current list. The list is sorted by that category. Click it again. The list is sorted in reverse order. Click the first, untitled section — this is sorted by date received (the default).

11. Sort the list by Site, Status, and Priority

Use **Tools menu, Sort List** to bring up the Sort Call form. Select fields on how you want the list sorted. Click OK.

12. Check the Other Information on the call

Select the call on the list. Use **View menu, Other Information menu** and make various selections. The information appears in a lower pane on the display. You can size the display by dragging the horizontal border. Notice how the Print menu (under the File menu) changes with the selections.

13. Look at the Graph format

Select a list with multiple calls on it. Use **Format menu, Graph** to bring up the graph display. Change the fields, change the style, change the options. Experiment. If you are on a bar chart, you can zoom the display by dragging from left to right to generate the window you want enlarged. To unzoom the graph, drag from right to left and upward, or make a new selection of field or style. When you are done looking at graphs, Use **Format menu, Graph** to toggle off the display. You can also select a call on the list; the display will return to a standard format.

Finding Calls

1. Look up a call

Use **File menu, Select Call** to bring up the Select NOIS Call form. If you know the last 5 numbers of the call (example: 50001), enter those and click the Submit button. You can then select the call from those found. If you know the entire call ID (example: SLC-0798-52604), enter it and click Submit. If you know the location abbreviation and approximate date the call was opened, enter the abbreviation — month and year (example: TUA-0798), then select from the list. Click OK for the selection.

2. Add this call to your Temp list

Use **File menu, Save List As** to bring up the Save NOIS Calls to a Storage List form. **Note:** if you don't have a personal storage list, you will be prompted to create one. If you have multiple storage lists, you can select them from the drop-down list. Select Add calls to list and click OK. Look at your Most Recently Used lists under the File menu.

3. Find text in the display

Select a call. Select the display (the cursor must be in the text). Use **Edit menu, Find** to bring up the Find form. Type in the text you want to find (example: undefined). Click the Find Next button. To find more occurrences use the F3 button.

4. Find text using Text Finder

Use **Tools menu, Text Finder** to bring up the Text Finder form. Select **Last number of calls** and enter 500. Enter the text you want to find in the calls (example: undefined) Click OK. Examine some of the calls to make sure they contain the text.

5. Use queries to find calls. Save the list

Use **File menu, Clear List** to start fresh. Use **Tools menu, Query** to bring up the Query form. Enter in the Field box: Module and <enter>. Enter in the Module/Version box: TIU and <enter>. Click the **And** selection. Enter in the Field box: Location <enter> and in the Location box: West Palm Beach <enter>. Click OK. Use File menu, Save List As to save this list (use Replace this list with these calls) and click OK

6. Use graphs to find the selections

Use **Format menu, Graph** to turn on the graph display. Select Status from the Fields list. Select a Pie style. With your cursor over the closed calls, do a right click. Select the menu item: Select where Status = Closed. Notice your list has changed to only the closed calls. Refresh the list by selecting Refresh List from the File menu (or use F5). Select a call in the list to turn off the graph display.

7. Sort the list and use selected calls to find calls

Click Status on the list header. Use **Tools menu, Select from List** and select the Selected Calls tab. Highlight (drag over) the closed calls. Click OK. You now have the closed calls. Refresh the list (F5).

8. Use a query to select calls

Use **Tools menu, Select from List** and select the Query tab. Type in Status <enter> in the Field box. Type in Closed <enter> in the Status box. Click OK. Same results. Refresh the list (F5).

9. Select calls using the list of STATUS: CLOSED. Refresh the list

Use **Tools menu, Select from List** and select the Lists tab. Type in Status <enter> in the List box. Type in Closed <enter> in the Status box. Click the Include List button (or <enter>). Click OK. Same results. Refresh the list (F5).

10. Use graphs and select multiple Specialists

Use **Format menu, Graph** to turn on the graph display. Select Specialist from the Fields list. Select a Pie style. With your cursor over a section of the pie, do a right click. Select the menu item: Add to multiples where Specialist = <somebody>. Click over another section, adding other specialists to your selections. You can review your selections using the View Multiples action. Now use Select Multiple Specialist. Your list is now only those selections.

11. Find the calls on this list that you have automatic notification on

Use **Tools menu, Notifications** to bring up the Notifications form. Select the Find tab. Select **Only calls in the current list**. Click OK. Refresh the list (F5) and repeat this except select a different user (example: Enter a specialist on a call that is in the list).

Other Stuff

1. Sign up for an alert

Select a list of calls (File menu, Select List). Use **Tools menu, Notifications** to bring up the Notifications form. Select the Be Notified tab. Select calls in the list (use the All Calls button, drag over some calls or hold down <Ctrl> while selecting calls. Click OK. You can confirm that you will be automatically alerted by using View menu, Other Information and selecting Notifications.

2. Alert someone

Use **Tools menu, Notifications** to bring up the Notifications form. Select the Notify tab. Select Alert. Select any calls you want to send with the alert. Select users you want the alert to go to by selecting them from the Users box. You must click on the user so that they appear in the **Send to** list. Include yourself to see how alerts work (and to do #3). **Note:** You can remove a user from this list by double clicking. Type in the **Subject of notification**. Click OK.

3. Process an alert

When you have new alerts the Process Alerts button on the tool bar turns red. **Note:** The icon for NOIS also turns red, so even if your application is minimized, you can see the change on your taskbar (also if you'd like a sound to play, see Icons and Sounds in the online help). To process alerts, click the Process Alerts button or use **Tools menu, Process Alerts**. The subject of the call will be appended with who sent the alert.

4. Remove alerts

If you receive alerts on calls you don't want to be alerted on, use **Tools menu, Notifications** to bring up the Notifications form. Select the Remove tab. Select the calls you don't want to be alerted on. Click OK. You can do this by using View menu, Other Information and selecting Notifications. **Note:** If you are using Notification by Affiliation or Active-Update lists to define your notification, you will still be notified on calls meeting those criteria.

5. Attach a web link to a call

Select a list of calls (File menu, Select List). Use **View menu, Other Information menu** and select the Web Link.. Browse to a web page that you want to associate with the displayed call. Click the Attach Web Link to Call button (the pin next to the Web Link selection) or right mouse click and select the same action. You'll be asked if you want to attach the page to the call. Click OK. Notice that the web link has a Call entry that is assigned this web page.

6. Create a web page

Use **Tools menu, Create Web Page** to bring up the New Web Page form. If you have a call selected, the form will be filled in with the call's package, subject, description, and resolution as defaults. If the current list is empty, you will have an empty form. Fill in or edit the information on the form so that it represents a common

problem and solution. Choose the **Attach web page to call** checkbox if you want this page linked to the call. Click Save. Review the web page by browsing to it from the Solution Index page.

7. Patch Tracking

Use **Tools menu, Profile Information** to bring up the Profile Information form. Click on the Patch tab. Select a patch and click on the various reports. Click on the Location tab. Select a location. Click on the reports that have to do with patches. Click on the Module tab. Select a module. Click on the reports related to patches.

8. Package Tracking

Same as #7 except only look at Location and Module tabs. Look for reports related to package installs.

Tips

Sign on to NOIS and keep it minimized while you work on other things. Specialists on Forum have a four-hour timeout. You can still monitor alerts while you work.

Unless you are on the AVANTI or AXP team, you probably don't need an Active-Update list to define your alerts. Use Notification by Affiliation for all calls in your Package Group and select all packages in that group. If you have lists you are not using, you can delete them by using Define Lists on List Manager, changing to that list, choose edit, and enter @. This will remove the list and notifications.

Quiz

- 1) What list would you use?
 - a) You processed your alerts but didn't get a chance to review them.
 - b) You want to look for some calls your coworker edited.
 - c) A site contact entered a call but thinks they entered the wrong package.
 - d) Someone entered a call but no package was entered.
- 2) How do you avoid reopening calls with the batch editor?
- 3) If you associate Call A to Call B, what will be the primary call?
- 4) How would you see a distribution of calls for your team by specialist?
- 5) For the current call, where do you find out?
 - a) who last edited it and what was changed
 - b) who is automatically being alerted on this call.
- 6) How do you go back to the calls you were reviewing before you did that selection query that found no calls?
- 7) How would you find out if a site has all the patches for a package installed.

Answers

- 1a. MRA: <yourself>, 1b. MRE: <your coworker>, 1c. MRE: <the contact>:, Entry Person: <the contact>, Site Contact: <the contact>, 1d. All-New
2. Make sure you select, Skip edits.
3. Call B's primary call.
4. Select your team list (restrict it to a reasonable number of calls), use a Statistic format for Specialist, or use a Graph format and use the field, Specialist.
- 5a. Status History/Audits (on the display toolbar or View menu, Other Information), 5b. Notifications/List (on the same toolbar or menu).
6. Before doing the query, save the list to your temp list. Then you can return to those calls by doing a refresh list (F5).
7. Use Profile Information, Module tab, select module, the report Patches Not Installed (at location), and site. Also from the Location tab, select site, the report Patches Not Installed (for Module), and module.