



RMS HelpSTAR 2010 Web Client User Guide

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For more information visit RMS at www.rms-inc.com

If you encounter problems while using HelpSTAR with RMS, Contact support@rms-inc.com

Introduction

Welcome to RMS's support interface which uses HelpSTAR to manage your requests and issues while allowing you as the client to track your requests, see what stage jobs are at and solve problems faster with additional tools such as the Knowledge Base.

This manual takes you through the basics of the HelpSTAR Client Interface. If you have any questions on how the service works, contact a support rep, or email jyamiolkowski@rms-inc.com for more information.

Requesting a HelpSTAR Account

When requesting an account please complete the form located on our website under the support → E-Support page then click the “Click here to request HelpSTAR access” link. Complete the form and when submitted, your account will be verified and then created and a confirmation email sent with your credentials.

Logging into the HelpSTAR Web Interface

RMS now uses a Single Sign on system to access HelpSTAR, TRAC, Training Documents and patch downloads.

1. Open a Browser (IE, Mozilla, etc.)
2. Navigate to <http://www.rms-inc.com>
3. On the top right corner of the web page, click the login button



4. Log in using your Email Address that is associated with your HelpSTAR Account and your password (case sensitive). When authenticated you will see the following: HelpSTAR – TRAC – Resources and Logout. You are now successfully authenticated into the web site.



To access HelpSTAR, click on the Helpstar link

If you have forgotten your password, click on the support button at the top of the page and then click the “Click here to reset your password” link. You will be prompted for your email address and once submitted an email will be generated with a temporary password. The change may take up to 15 minutes in order to sync with the web site.

The Web Portal




Leaders in Housing Management Software

testuser
Logout


Support Hours:
 8:30am - 5:30pm EST
 919-744-2500
<http://www.rms-inc.com>

Announcements


Welcome testuser




New Service Request
[Log a new service request, report an issue, or ask a question.](#)




Knowledge Base
[Search for best solutions to common issues or questions.](#)



Request History
[View a complete history of all your requests. You can update requests from this view.](#)



Account Information
[View and update your account.](#)



Alerts & Messages
[View and respond to alerts & messages recieved.](#)

Open Requests

Ref#	Title	Time Logged	Status
37359	Test Request	06/15/2011 09:13	In Dispatch

Browser Compatibility

End User Web Portal Browser Compatibility:

- Internet Explorer 6.0 or higher



- Apple Safari 4.0.5 or higher



- Google Chrome 3.0 or higher



- Mozilla Firefox 4.0.223 or higher



End User Web Portal Functions

View Support Hours

RMS Support Hours, phone number and company URL will be available in the left pane of the HelpSTAR Web Portal.

Support Hours:
8:30am - 5:30pm EST
 919-744-2500 
<http://www.rms-inc.com>

Welcome Area

To the right of the Support Hours is a whitespace with text stating welcome (user). If you scroll down you will see the following links.



Chat LIVE with Support



Learn about RMS on Facebook



Keep up with RMS_Inc on Twitter

View Announcements

RMS will post important Announcements regarding scheduled outages, upcoming events and other important messages. This will appear in the left pane of the Web Portal below your Service Desk Hours. A preview of any Announcements will appear as shown below:

Announcements

Annual Christmas Potluck

Our upcoming company wide potluck will be held on December 17th.

[» Show Details](#)

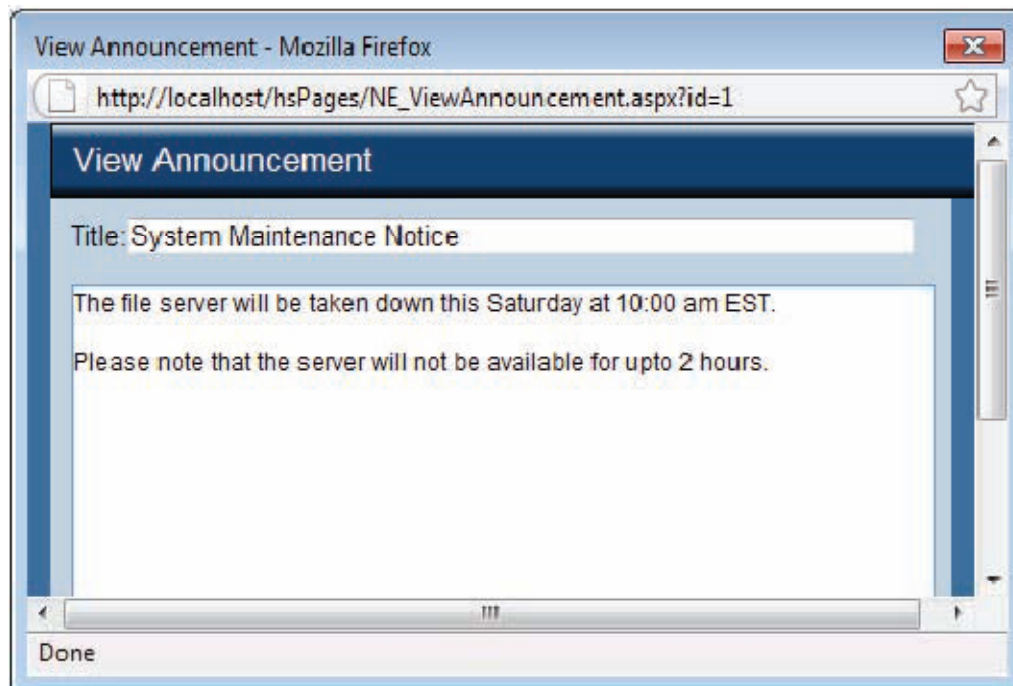
System Maintenance Notice

The file server will be taken down this Saturday at 10:00 am EST.

...

[» Show Details](#)

If you wish to view the entire Announcement, simply click on the » [Show Details](#) link. All contents of the Announcement will appear in a separate window as shown below:



Submit a New Service Request

An End User can submit a new Service Request from the Home Page of the Web Portal by clicking on the New Service Request link:







New Service Request

Log a new service request,
report an issue, or ask a question.

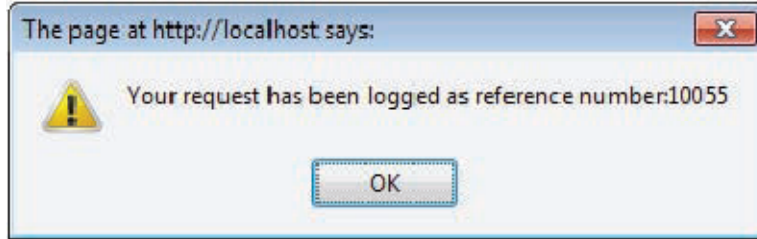
You will then be presented with the main request form:

The screenshot shows a web application window titled "Home > New Service Request". At the top, there is a dropdown menu labeled "Incident". Below this are two tabs: "Main" (selected) and "User Defined Fields". The "Main" tab contains several form fields: "Requester" (text input with "Bob Stevens"), "Urgency" (dropdown menu with "Medium"), "Category" (dropdown menu with "Software"), "Due By" (dropdown menu with "ASAP"), "Asset" (dropdown menu with "None"), and "Move To" (file explorer icon). Below these is a "Request Title" field containing the text "Saved Excel Files will not open". Underneath is a "Memo" section with a rich text editor toolbar and the text "I am attempting to open an excel file from a shared drive and it will not open". At the bottom right of the form are "Save" and "Cancel" buttons.

To submit a Service Request, perform the following:

1. Select a Category and enter a Request Title/Memo describing the nature of your problem or question. These values are mandatory to log a Service Request. If applicable, your Service Desk may require additional fields on the User Defined Fields tab of the request.
2. Modify the Urgency and Due by Date if required.
3. Other actions available on a Service Request include:
 - a.  Include a file attachment to this Service Request.
 - b.  Set a reminder for yourself in regards to this request. These reminders will appear in the history of a request as well as under Alerts and Messages section on the Home Page of the Web Portal.
 - c.  Click the Help icon to open our Help File
4. Once you have completed entering the required information for this request, click on the  icon or the **Save** button at the bottom of the form to submit the request. You can also click on the **Cancel** button to exit this form without saving.

A prompt will appear once you have successfully submitted your request:



Click on **OK** to return the Web Portal Home Page.
Once submitted, you will be returned to the Home Page and your new request will be listed under Open Requests.

Open Requests

Ref#	Title	Time Logged	Status
37859	Test Request	06/15/2011 09:13	In Dispatch

View Request History

An End User can view their entire request history by clicking on the option below:



Request History

View a complete history of all your requests. You can update requests from this view.

Once this option is selected, all requests you have submitted (regardless if they are open or closed) will appear in this list. Your request history will appear as shown below: By clicking on a Service Request, you can view status of your requests and any updates made to your requests. If you wish to re-open a closed request, you can do so by updating the request and un-checking the closed option in the Service Request.

Ref#	Title	Time Logged	Status
10055	Cannot open excel files from a shared drive	11/05/2010 10:43	In Dispatch
10054	Unable to access the F Drive	11/04/2010 16:25	In Service
10053	cannot log into my machine via vpn	11/01/2010 16:28	Closed

By clicking on a Service Request, you can view status of your requests and any updates made to your requests. If you wish to re-open a closed request, you can do so by updating the request and un-checking the closed option in the Service Request.

Main Request Details User Defined Fields

Requester: Close

Request Title:

Memo:

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I've attempted to lo login today and unable to connect via VPN again. Please help!

View Account Information

An End User can view their contact information by clicking on the option below:




Account Information

View and update your account.

Your Account Information will appear as shown below:

Home > Account Information



Name:	<input type="text" value="Bob Stevens"/>
Email:	<input type="text" value="Bstevens@oceanhouse.com"/>
Phone:	<input type="text"/>
Fax:	<input type="text" value="bob stevens"/>
<hr/>	
Password:	<input type="password" value="••••••"/>
Confirm Password:	<input type="password"/>
<hr/>	
Company:	<input type="text" value="Ocean House"/>
Street Address:	<input type="text" value="89 Pine Crest Road"/>
City:	<input type="text" value="Melvinville"/>
State/Province:	<input type="text" value="OK"/>
Country:	<input type="text" value="USA"/>
Zip/Postal Code:	<input type="text" value="78261"/>

From here, you can modify your email address, phone number and fax number. You can also update your HelpSTAR password.

Search the Knowledge Base

An End User can search Best Solutions in HelpSTAR by clicking on the option below:




Knowledge Base

Search for best solutions to common issues or questions.

Once this option is selected, the Knowledge Base will open. By default, a current list of all Best Solutions will appear in this view.

Home › Knowledge Base ?



Search Phrase: [Top Articles](#) | [Recently Updated Articles](#) Search

Any Word All Words Exact Phrase

id	Title
1	How to Log a Request Within The End User Web Portal
6	Setup Personal GMail account on a Blackberry
4	How To Set up VPN Connections in Windows XP
3	Error 429 With Sales Application
2	Error 4934 When Opening Word

To view Best Solutions that are accessed the most often or that were recently updated, click on the [Top Articles](#) | [Recently Updated Articles](#) links available above the search filters. When you click on a title of a Best Solution, it will appear as shown below:



Title: How To Set up VPN Connections in Windows XP

Category: VPN

Problem Description: How To Set up VPN Connections in Windows XP

Resolution:

1. Open the Windows Control Panel.
2. Open the Network Connections item in Control Panel. A list of existing dial-up and LAN connections will appear.
3. Choose the 'Create a new connection' item from the left-hand side of the window. The Windows XP New Connection Wizard will appear on the screen.

Revision Date: 08/27/2010

Keywords: How To, Microsoft

View Alerts and Messages

An End User can receive important notifications from your Service Desk regarding their Service Requests. These notifications can be accessed by clicking on the option below:



Alerts & Messages

View and respond to alerts & messages recieved.

A listing of these messages will appear and a preview pane is available to show you the contents of the Alert or Message.

Home > Alerts & Messages

Display Alerts Messages Reminders

Ref #	From	Time Scheduled	Thread	Title
10054	Peter Adams	11/05/2010 11:41	Please Retry	Unable to access the F D
10053	HelpSTAR	11/01/2010 16:43		cannot log into my mach




Preview:

From: Peter Adams
Sent: Friday, November 05, 2010 11:41:02 AM
Title: Unable to access the F Drive
Requester: Bob Stevens

- Sent Quick Message to Bob Stevens on 11/5/2010 11:41:02 AM (11/5/2010 3:41:02 PM - GMT)

Hello, I was able to access the F Drive as well as a few of your team members. Can you reboot and retry?





There are 3 types of notifications you can receive in regards to your requests:

1.  **Alerts:** Notifications are sent when certain HelpSTAR events occur. Typically, these will be sent to alert an End User when a request is closed or updated.
2.  **Quick Message:** A Support Rep can send an End User a message regarding their request. An End User can respond to these messages.
3.  **Reminders:** End Users can send reminders to themselves in regards to their requests.

In the Display settings, select the type of notifications you would like to view:

Display Alerts Messages Reminders

Additional Options are available to manage your notifications:

1.  Snooze this Alert or Message to appear at a later time.
2.  Permanently remove the selected Alert or Message.
3.  Reply to a Quick Message
4.  View the details of a Request this Alert of Message was sent from.

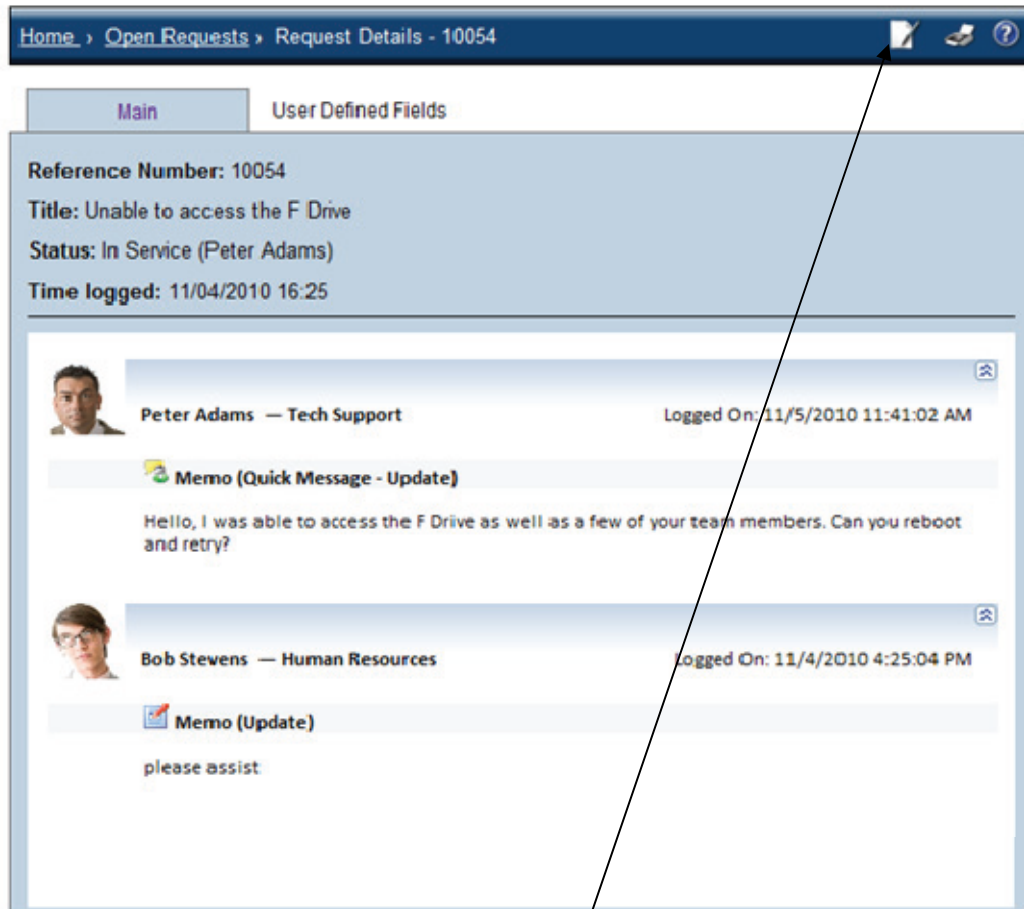
View and Update Open Requests

Any open requests that an End User has logged will appear in the Open Requests pane at the bottom of the Home Page:

Ref#	Title	Time Logged	Status
10055	Cannot open excel files from a shared drive	11/05/2010 10:43	In Dispatch
10054	Unable to access the F Drive	11/04/2010 16:25	In Service

To update a request, perform the following:

1. Highlight and click on a request listed in Open Requests.
2. Once selected, the Request Details of this request will open.



3. To update this request, click on the icon in the top right hand corner of Request Details.
4. Once this request opens in Update mode, you can insert a memo to this request. To close this request, check **Close** the checkbox.

Home › Open Requests › Request Details › Update Request

Incident

Main Request Details User Defined Fields

Requester: Bob Stevens Close

Request Title: Unable to access the F Drive

Memo:

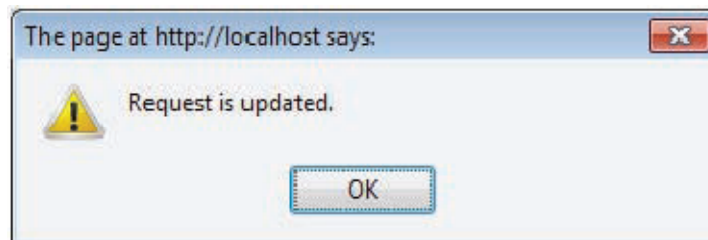
Font family Font size **B** *I* U | [List Icons] | [Color Icon] [Image Icon] [Text Icon]

I am able to access the drive now, thank you!

Save Cancel

5. Once you have updated this request, click on the icon or the **Save** button at the bottom of the form to update the request. You can also click on the **Cancel** button to exit this form without saving.

A prompt will appear once you have successfully updated your request:



Click on **OK** to return the Web Portal Home Page.