RMS HelpSTAR Web Client User Guide

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Build 9.0.138

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

If you encounter problems while using HelpSTAR with RMS, contact Joe Yamiolkowski jyamiolkowski@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

RMS will create up to 3 Helpstar accounts per client. When requesting access, please email helpstar@rms-inc.com with the following details and in the title please enter “New HelpSTAR Account Request”:

First and Last name:
Position:
Email address:
Phone number:

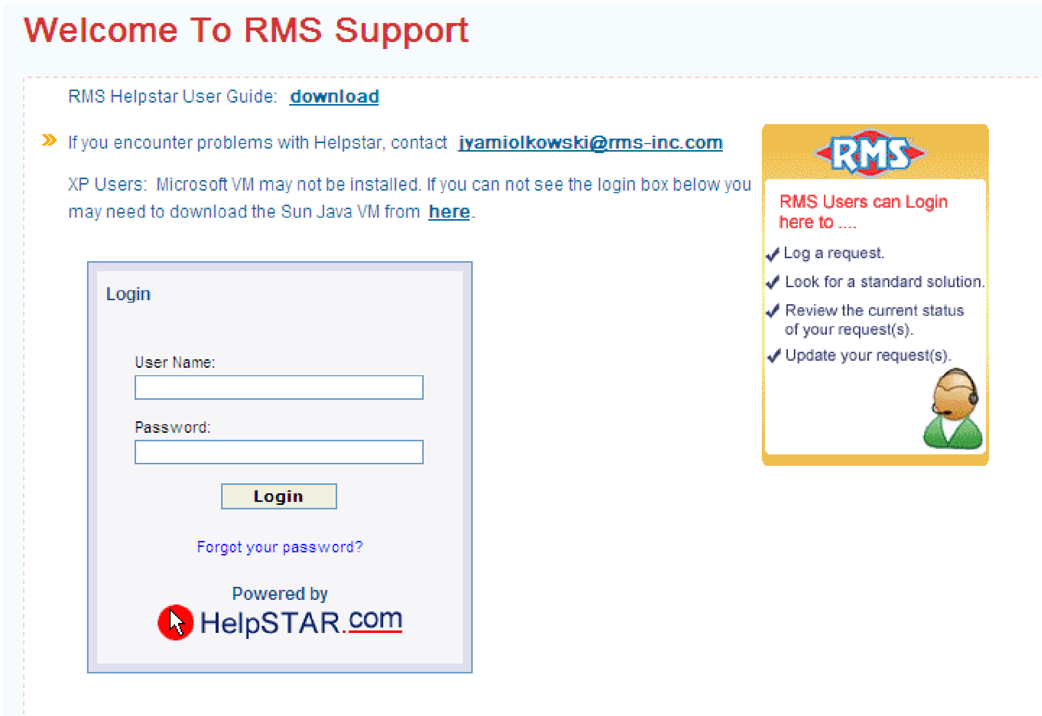
Logging into the HelpSTAR Web Interface

Your RMS Support Representative will provide your site with a number of logins that your key staff (local support personnel, database administrator, and primary site contact) can use to log support requests.

In order to access HelpSTAR, you will need to perform the following steps:

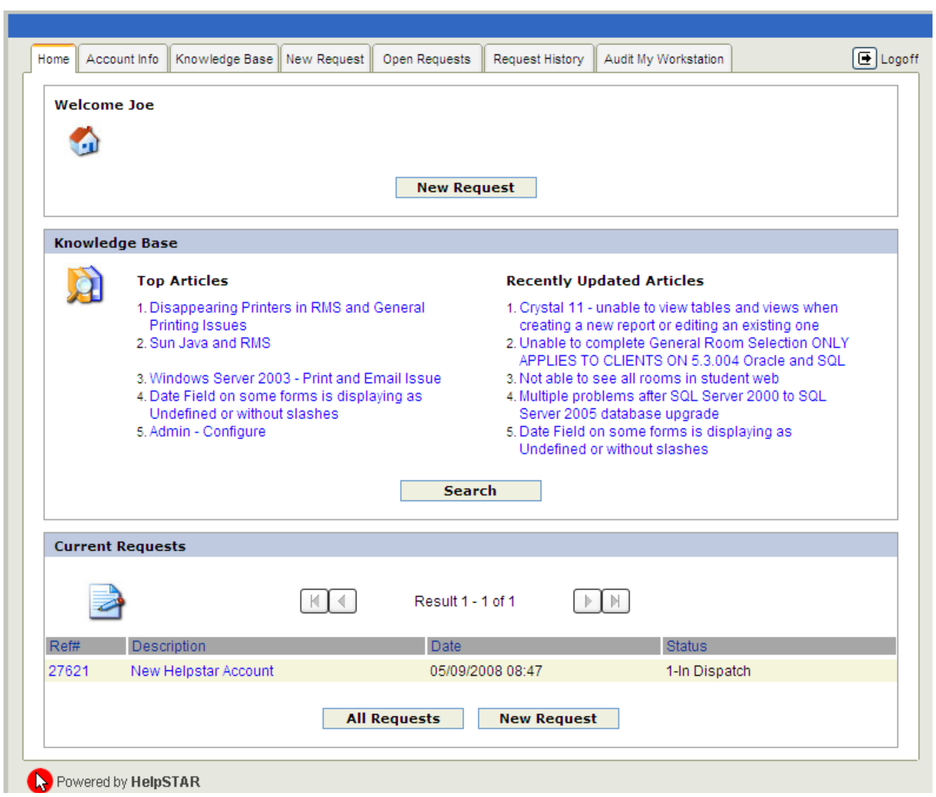
1. Open Internet Explorer
2. Click Tools
3. Select Internet Options
4. Click Security Tab
5. Select Trusted Sites
6. Click Sites
7. Ensure the https checkbox is deselected
8. Type http://207.235.68.226:83/helpstar/ into the top box
9. Click Add (this will add the above site to the bottom box)
10. Click OK
11. Click Apply
12. Go to www.rms-inc.com
13. Click the Client Support button
14. Click the HelpSTAR Login link

Note: Username and Password are case sensitive



If you have forgotten your Password, click the “Forgot your password” link and then enter the email address linked to the account and a temporary password will be emailed to you.

Once you are authenticated, you will then be presented with the HelpSTAR Home Page:



Navigating the Web Interface

The tabs at the top of the form will provide access to the available functions within this interface.
Note: (RMS currently does not utilize the Audit My Workstation Function)

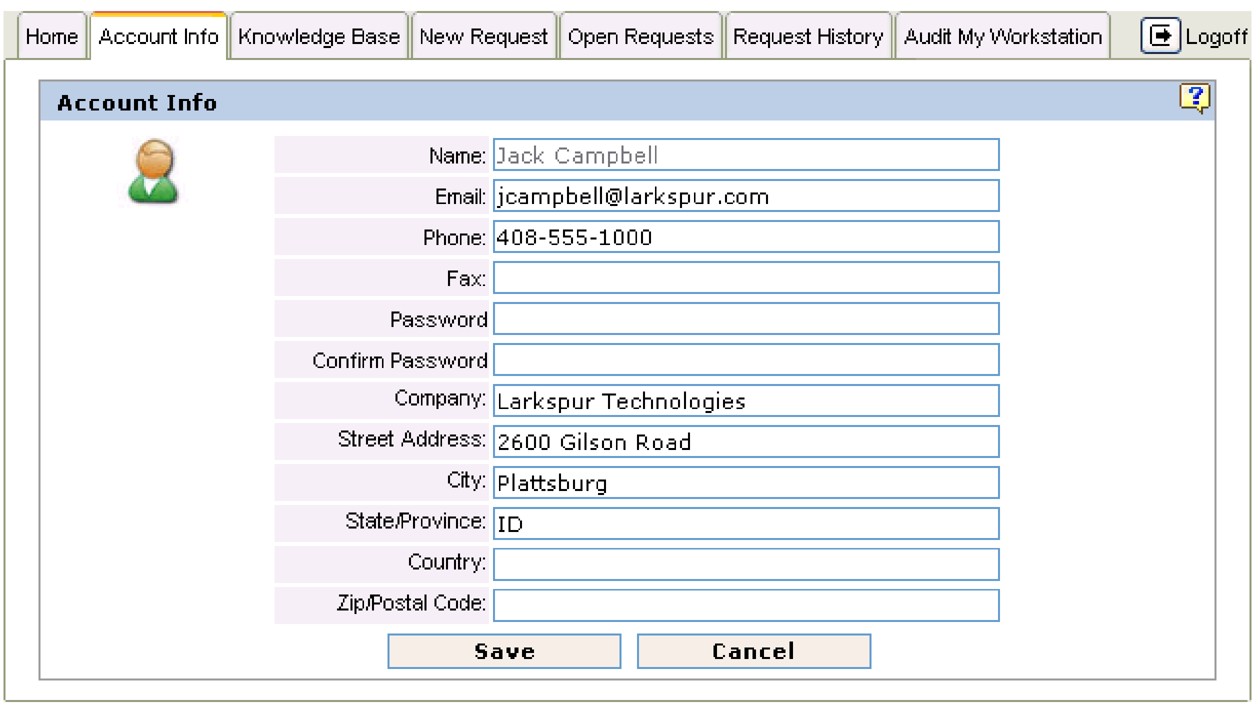
Home Tab

After logging into the web interface, you are presented with access to the following functions:

- Submit a new request
- Search the Knowledge base
- View the active requests and access details by clicking on the ref# link

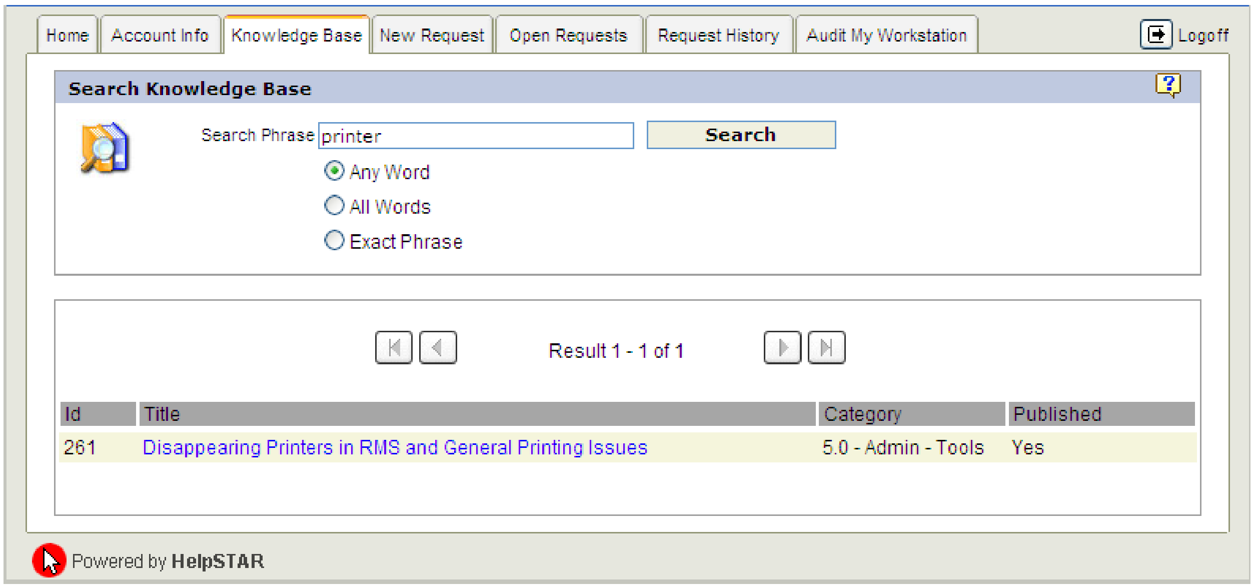
Account Info Tab

On this form you can view and edit your account information and change your password



Knowledge Base Tab

Statistics indicate that 80% of service requests relate to recurring questions or problems. HelpSTAR's Knowledge Base ensures that search results are focused and comprehensive. The Knowledge Base enables access to resolutions for known, recurring questions.

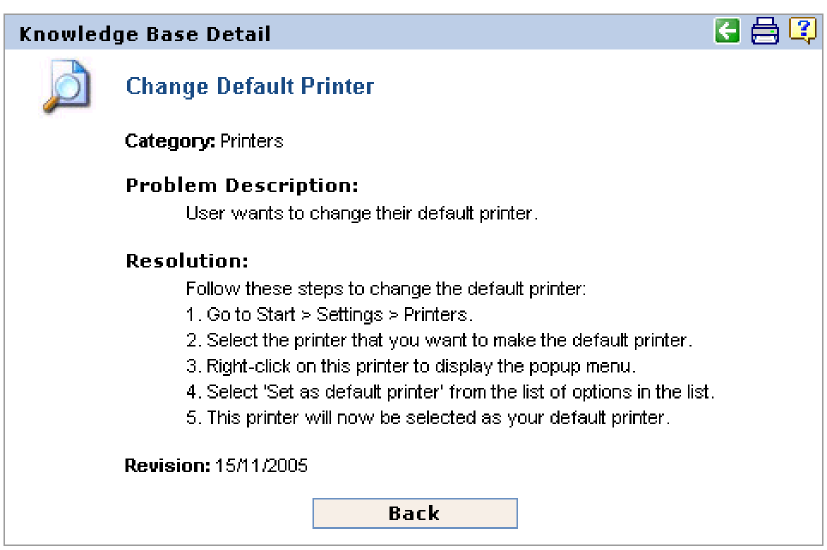


The RMS Knowledge Base currently has over 200 problems outlined.

To find a Knowledge Base article in the database:

1. Click on Knowledge Base Tab
2. Type in a search phrase:
    - Any Word: Applications
    - All Words: "Application Mailmerge"
    - Exact Phrase: Application and Mailmerge
    - Wildcards: App*

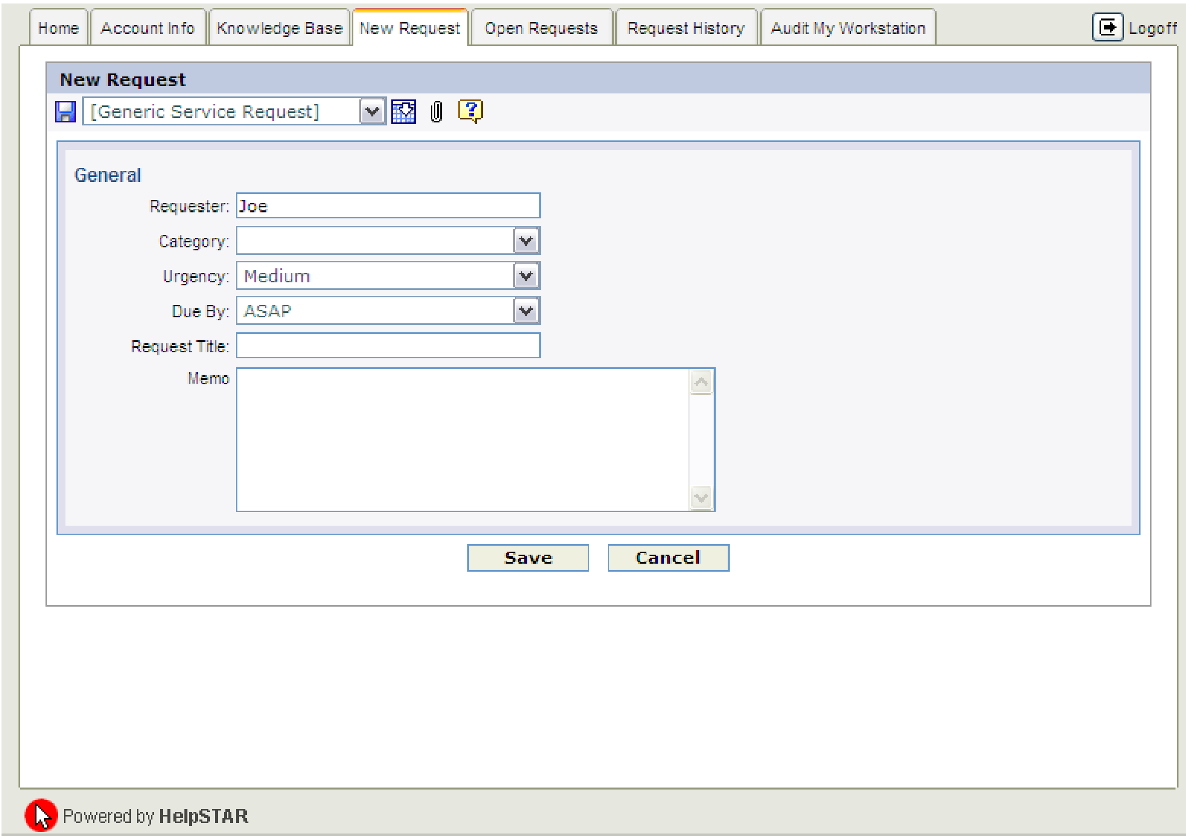
3. Click on Search
4. Click the title to view the details of the Knowledge Base article.



New Request Tab

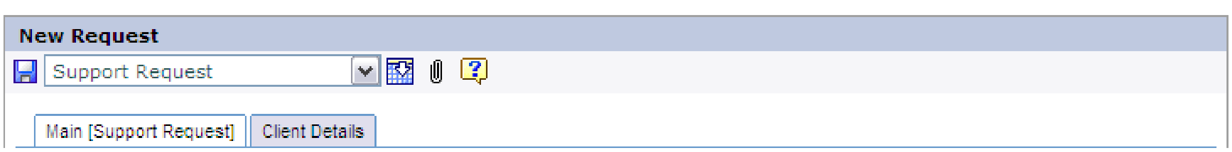
To open a new service request, click the New Request button on the home page, or click the New Request Tab.

There are two types of requests available. Generic Service Request and Support Request.



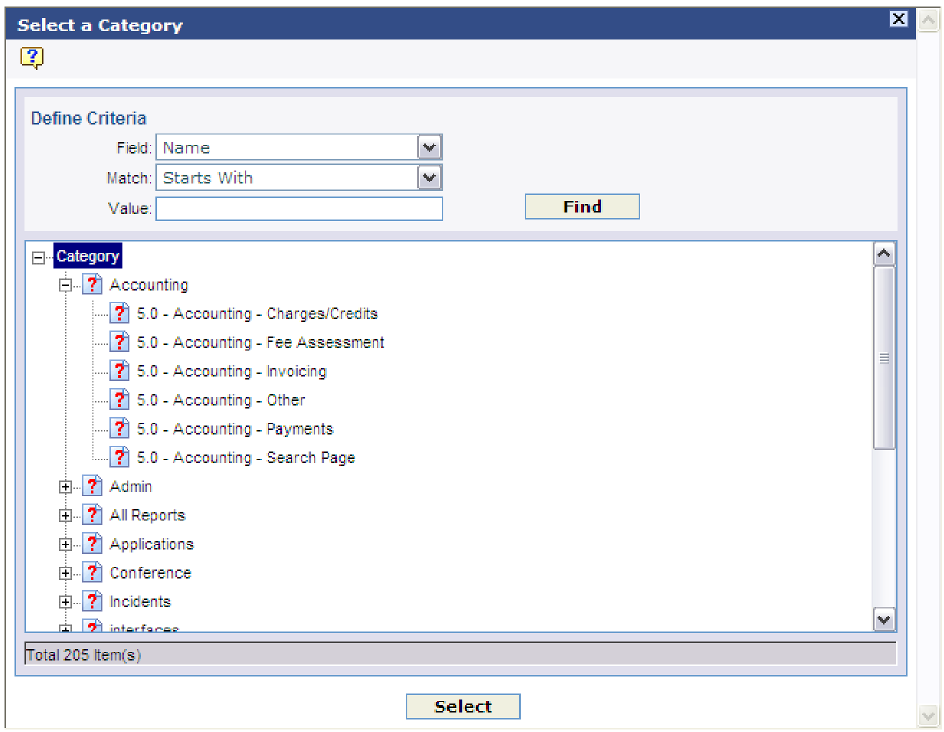
Generic Service Request: This request type will provide the support team with basic information pertaining to your request. At minimum there must be a request title.

Support Request: When selecting the support request option from the dropdown list at the top of the form, you will be presented with an additional tab titled Client Details. After clicking on this tab, a new form will open providing you with a number of questions. All questions marked with (Required) must be filled in. The questions provided allow us to understand your environment and have critical information to assist in the troubleshooting of your request.

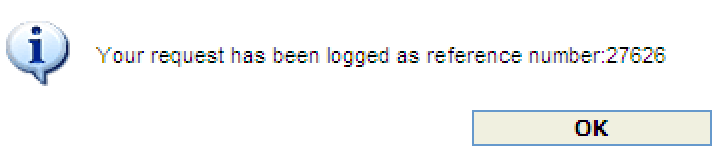


Generating a new request

1. Click on New Service Request.
2. The New Request window appears.
3. Select either the Generic Service Request or support request option
4. Enter the name of the requester
5. Select the category that is best associated with your ticket
    a. The categories are arranged my module and then function
    b. You can search for a specific category or expand the module link.

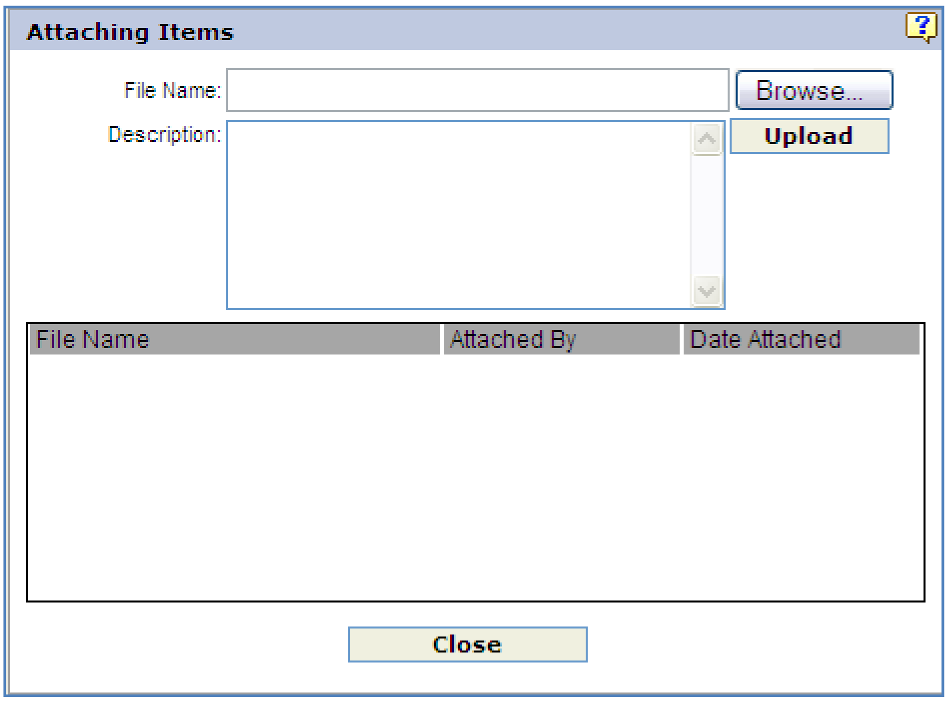


6. Select the urgency level
7. Set the due by date (optional)
8. Disregard the Item Field
9. Enter the title of your request
10. Create a memo describing the problem. Memos should include information like:
    a. A general description of the problem
    b. Steps taken to replicate the problem
    c. Which RMS Module you are having a problem with (eg Accounts, Applications Mail merge, Web Module)
    d. Whether the problem is constant, intermittent, or only on a specific users machine.
11. Save the request.
12. Once you have saved the request, HelpSTAR will display a new reference number.



Attachments

Attachments like screen shots, error dumps, sample reports, etc can be sent with the initial request by clicking on the paperclip icon on the top bar of this form



How to add an attachment

1. Click the paperclip icon to open the Attachment Popup
2. Click the browse button and navigate to the file
3. Once selected, click the upload button
4. After uploading all files, click the close button

Note:

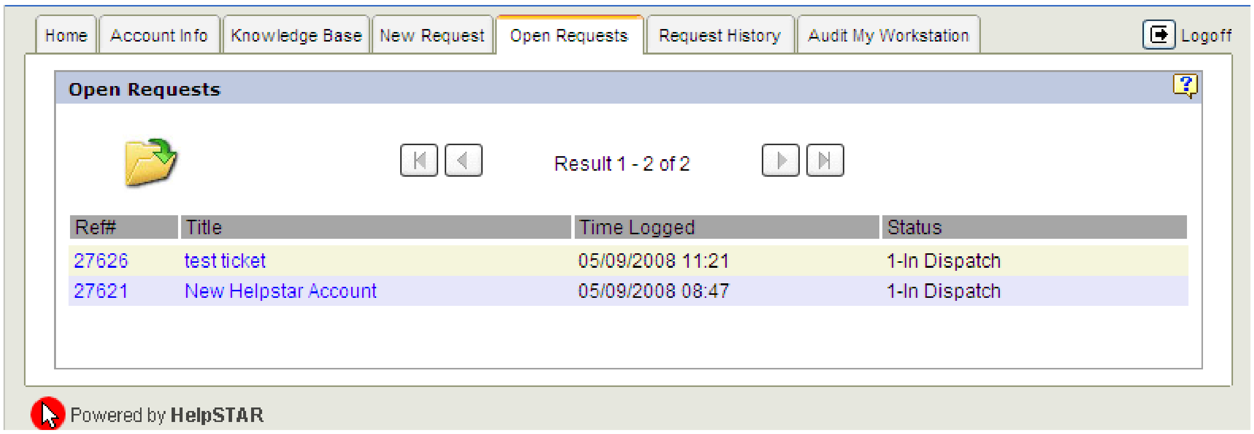
- Please zip all attachments to avoid corruption.
- Attachments may not exceed 10MB

For most jobs, once you have logged a New Request, that may be all you need to do, with the job being completed by your support rep and closed in the system.

Occasionally, once support reps have responded to the job, you may receive progress emails.

At times these emails will also include questions regarding the request, either wanting more information, or obtaining clarification on the request. You can reply to these emails to progress the job directly in the system.

Check Status of Open Requests and
Look up the History of Closed Requests (Request History)



The above three menu options are very similar in that each allows users to track the status of their various requests. For Open and Closed requests, you can filter for specific types of jobs using the filter options that appear on the screen when you select the menu option.

By looking at Open requests, users can see if the problem they are encountering has already been logged, and what it's status is if it is open. Users can check through their Closed requests to see if they have previously been given a solution to the problem they are encountering, or to see if a recent job has been resolved to their satisfaction.

Checking for follow ups displays any jobs that have been scheduled in the system for follow up at a later date.

Audit My Workstation

This section is disabled in RMS's HelpSTAR interface.

Help

The HelpSTAR Web interface provides robust function specific help pertaining to the function you are performing. This is accessed by clicking on the question mark icon located on the each form. Follow the dynamic links within the form to obtain more specific information.

Logoff

Clicking Logoff will log you out of HelpSTAR. You should always Logoff from HelpSTAR when you are finished your session.