

Fujitsu Services

PEAK User Guide

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User Guide

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## 0.0 Document Control

### 0.1 Document History

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0.1	09-Dec-2003	First Draft	
0.2	01-Oct-2004	First Formal Review	

### 0.2 Review Details

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Review Comments to:	<i>Catherine Obeng</i>

Mandatory Review Authority	Name
Peak Front End Development	John Simpkins
Peak Design Authority	Lionel Higman
Optional Review / Issued for Information	

( \* ) = Reviewers that returned comments

### 0.3 Associated Documents

Reference	Version	Date	Title	Source
PA/TEM/001	8.0	19/12/02	Fujitsu Services Document Template	PVCS

**Unless a specific version is referred to above, reference should be made to the current approved versions of the documents.**

## 0.4 Abbreviations/Definitions

Abbreviation	Definition
Call	A term used to reference the Incident/Defect record held in Peak
CP	Change Proposal
DDL	Drop Down List
GUI	Graphical User Interface
LoV	List of Values
Peak	A Fujitsu Services call management system used within Post Office Account.
SMC	System Management Centre (2 <sup>nd</sup> Line Support)
UTC	Universal Time Coordinates

## 0.5 Changes in this Version

Version	Changes
0.1	Any comments or feedback received, as a result of the review process will be incorporated in future release of the document.
0.2	Comments received from Reviewers.

## 0.6 Changes Expected

Changes
Peak is ongoing in its design and therefore features, which might be missing at this release, may be included at a future release.
The HTML Call List grid will be included at next release of this document.

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## 1.0 Introduction

Peak is the replacement Call Management System for Pinicl. Peak has a completely different design. Newer technologies have been employed to minimise upgrade requirements and future maintenance costs. Albeit, every effort has been made to minimise any huge differences in the GUI between Pinicl and the new PEAK.

What can you do in PEAK? You can use PEAK to:

- Log New Calls
- Respond to Calls
- Update existing Calls
- Create Personalised Queries (for reporting purposes)
- Search for particular Calls
- Link Calls with Other Calls
- Print Calls, KELs
- Reopen Calls
- Change user password
- Access the KEL and PowerHelp Database interfaces
- Manage Evidence files
- Handle Contacts

You can also customise your PEAK interface.

### 1.1 Call Handling

- [Logging into Peak](#)
- [Logging New Call](#)
- [Viewing Call List](#)
- [Updating Existing Calls](#)
- [Call Cloning](#)
- [Closing and Re Opening Calls](#)
- [Copying a File from your PC](#)

## 2.0 Scope

This document is targeted at people trying to use Peak Call Management System to log calls, update calls, route calls, manage evidence, and close calls. The purpose of this documentation is to serve as a user reference to accompany the Peak client interface.

The client application interfaces with a limited number of views based on several underlying tables. Technical details about related tables and files are not included in this User Guide.

### Use of Comments in this document (For on-line copy only)

Throughout the document, comments have been used in the form of **Note:** to minimise the volume of text in the document and also to provide extra information where it is thought helpful to the user. Hold mouse over the sign **Note:** to view hidden text.

## 2.1 Notation Used

The following notation is used to add more information where it is thought to be necessary. For online readers point to the word **NOTE:**.

## 3.0 Getting Started with Peak

With an Intranet connection and Internet Explorer, you can find and view information on the PEAK main server.

If it is your first time of attempting to connect to the Peak client, just click the topics below to get started, or click on Index and type in a keyword. You'll find more information to help you use Peak efficiently.

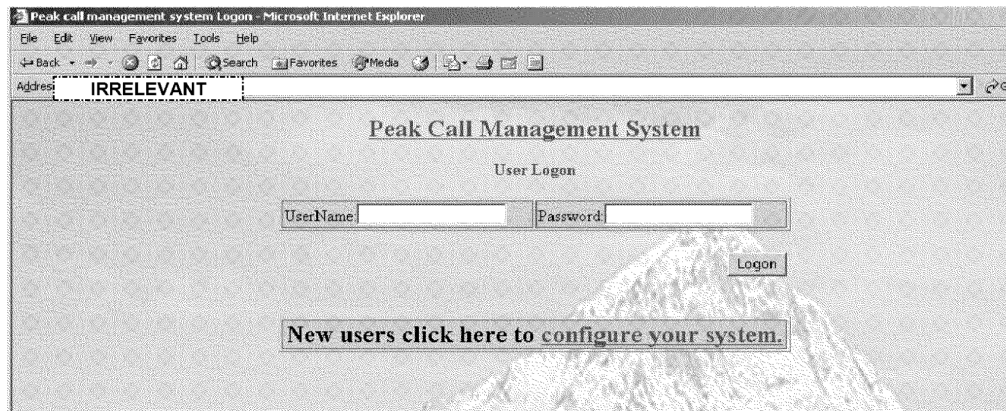
## 3.1 Initial Connection to Peak Server and the Client Application (Java)

For how to configure your PC to connect to Peak server using ODBC and how to set up your Client environment, click this link: [IRRELEVANT](#) and follow the link 'configure your system' see Fig 1 below.

## 3.2 Logging into Peak

The URL for accessing the Peak Client is [IRRELEVANT](#).

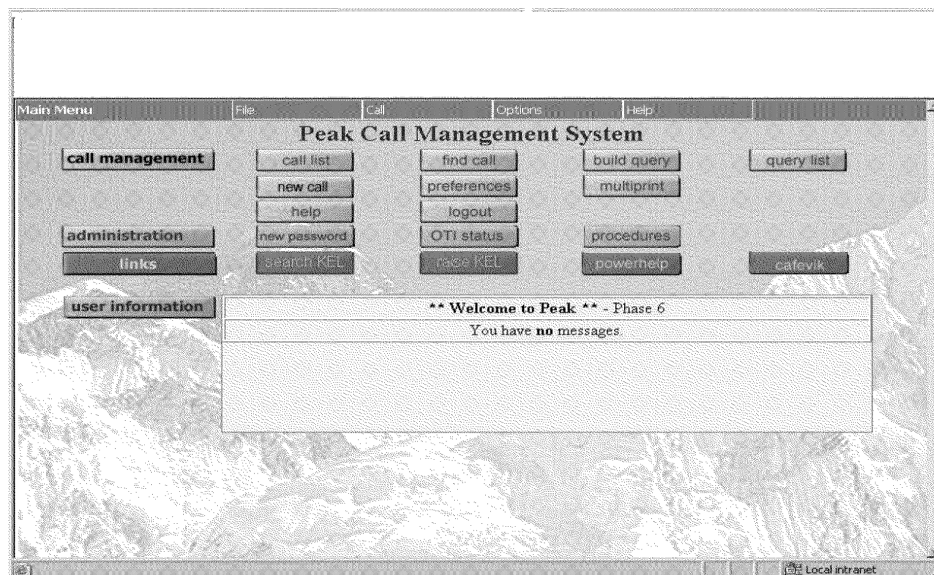
As soon as the page is located, the logging screen is displayed.



*Fig 1 Peak Login page*

Type in your username and initial password, which would have been assigned to you by the Administrator

- Click on the Logon button underneath, this displays the Peak Main menu page or
- Press Enter



*Fig.2 Peak Main Menu page*

See section on [Preferences](#) for how to customise the background wallpaper.

At any point in using Peak, users can access the same commands both via the Menu driven commands under the main headings File, Call, Options and Help or by using the web based approach of event driven, icon based. Both will invoke the same code to run.

## 4.0 Logging New Call

Where a new incident is reported there must be a formal way of tracking and fixing the problem. A call must be raised, this is done within Powerhelp or from within Peak depending on who the incident is being reported by, e.g. Post Master via HSH, Events via SMC or Future Release problems via Testing.

### To End of Section 4

- [Logging New Call](#)
- [Call Type](#)
- [Priority](#)
- [Summary](#)

- [Subject Product](#)
- [Product Groups](#)
- [Progress](#)
- [Response Text](#)
- [Target Release](#)
- [Target Date](#)
- [Target Time](#)
- [Route](#)
- [Manual Routing](#)
- [Auto Route](#)
- [Call Logger](#)
- [Team](#)

To log a call, from Peak **Main Menu** page;

Point mouse on Call

- Click **New**.

The **Main Menu** page is displayed immediately after successful validation of your user account.

To Enter **New Call** Details:

- Click **New Call** button, or choose **New** from the Call menu on the Main Menu bar both will display the New Call form.
- Choose from the DDLs or input text in the appropriate fields.

The screenshot shows the 'New Call' form in the Peak Call Management System. The form is titled 'Peak Call Management System' and has a menu bar with 'File', 'Call', 'Options', and 'Help'. The form contains several fields and buttons:

- Call Logger:** Catherine Obeng
- Team:** EDSC
- Reported In Release:** Not Selected
- Top Ref:** None
- Call Type:** Not Selected
- Priority:** Not Selected
- Summary:** (empty text area)
- Response Text:** (large text area)
- Response Category:** Progress Only
- Target Date:** (empty)
- Target Time:** (empty)
- Subject Product:** None
- Manual Routing:** EDSC
- Buttons:** Auto Route, Route, close window, Main Menu

A note at the bottom of the form states: "Note fields marked in orange are mandatory".

Fig 3 Peak New Call form

Mandatory fields are Call Type, Summary, Priority, Release and Subject Product. These appear in a different colour for high visibility. For a new call to be generated the five fields must be completed. It is not important in what order the mandatory fields are filled in, in any case, the last one to be completed, activates the **Auto Route** and **Route** buttons. Click on either **Auto Route** or **Route** for the for a call number to be generated and call assigned to a team or individual depending on which of the buttons was selected.

#### 4.1 Call Type

From the **New Call** form, a default value is selected from the **Call Type** DDL, (a preference exist to default this value)

- Click the down arrow to select from the DDL. ('NOT SELECTED' is considered an invalid value for this field, therefore as long as 'NOT SELECTED' is showing; the colour will remain orange until changed to a valid value.)
- Select a valid value from the list the new value overwrites the default. Once a value is selected from the list, the colour reverts to normal colour in keeping with the rest of the page.

#### 4.2 Priority

Each **Call Type** has a list of level of priorities associated with it. The priority levels start from A – D, with 'A' priority being the top most level and D the least. Priority must be explicitly selected from the DDL; the default is 'Not Selected'. If a default call type is selected from Preferences option, the lowest priority available will be the default.

➤ Click on down arrow to select from the DDL. The list of values that is displayed in this field is dependent on the **Call Type** selected.

➤ Select from the DDL

Choosing a valid priority from the DDL activates and populates the Target Date and Target Time fields at the bottom of the page.

#### 4.3 Summary

This is used as the title field for the call. When page is displayed, the field is empty; a short text (a summary of the problem to be described in the Progress box) must be typed into the Summary input box, there is a 50-character limit.

#### 4.4 Subject Product

A product can be a Hardware or Software. Every product has an associated owner. Choose from the DDL. This event also causes another DDL (a subset of products) Product Groups to be displayed.

Many Teams can own a Product, however, only one Team can own a Product of a specific version. For example

Product	Version	Team Owners
ACDB Server	1.1	UKSS
ACDB Server	1.8	Auto Config
ACDB Server	2.1	PIT

Option to use popup to select a product by Name rather than Group.

**Note for Inline readers ONLY::**

#### 4.5 Product Groups

This DDL displays the subset of the associated Subject Product chosen. Field defaults to a white space,

➤ Click on the down arrow (to the right)

➤ Select from the DDL, the most appropriate Product associated with your chosen Subject Product.

#### 4.6 Response Text

Progress text will be displayed in the call history. To add new update to a call you click Response Category. Typing in new text will cause the call Status to change.

#### 4.7 Target Release

Target Release is the scheduled POA, Horizon Programme release identifier for which a resolution to the problem is required. During the life of a call, its Target Release can be changed more than once to reflect the time frame that a fix is to be provided for the fault. When the New Call form is displayed, the field defaults to 'Not Selected'.

#### 4.8 Target Date

Field is blank when New Call form is loaded. Target Date is the timescale within which a faulty Peak call must be resolved. It is dependent on the Priority functionality where once input is received in the Priority field the system will automatically populate the Target Date and Time fields.

#### 4.9 Target Time

Field is blank when New Call form is loaded. It is associated with the Target Date field. Time is displayed in Local Time.

#### 4.10 Route

Calls can be routed automatically (in which case PEAK transfers the call according to the subject product, product version and platform) or manually (in which case the user routing the call must specify to which team or user the call is to be transferred).

At the point where a New Call form is loaded, the **Route** button is grayed out. All the mandatory fields (appearing with an orange background) on the form must be completed before the **Route** button becomes visible. Once default values have received valid input, you can transfer the call between teams and within teams to individual users using the Route button on both the New Call form page and Call Details page.

The Route button has two main functionalities on:

##### 4.10.1 New Call Form

Having completed all the default fields in creating a **New Call** form, user must click on **Route** for the details to be committed.

- Click Route button to transmit the call details to the PEAK database server, a unique call number is allocated
- Call is automatically routed to the Logger (by default but can be changed)

#### 4.11 Manual Routing

This option enables the user to select a Team or another user to transfer the call to. The team displayed is the current user's default Team.

- Click on down arrow
- Select a **Team** from the DDL this triggers another DDL containing a subset of usernames associated with that team. DDL

- Click on the down arrow (to the right), field has a default value as **'Team Only'**.
- Select a username from the DDL, the team member you wish to route the call to.

**Note for Inline readers ONLY:**

#### **4.12 Auto Route**

When a **New Call** form is loaded, the **Auto Route** button is greyed out. The five mandatory fields must be filled in before **Auto Route** the button becomes activated. **Auto Route** causes details to be committed the PEAK database and for a unique number to be assigned to the call. Other functionality is to allocate the call to a team based on the Subject Product selected.

#### **Default Populated Fields**

When the **New Call** form is loaded, the system will automatically populate the following two fields with information based on your user account details.

#### **4.13 Call Logger**

Full name of the user is displayed in this field.

#### **4.14 Team**

Default Call logging team will be displayed, user can select any of their other teams at this point.

[Back to Top of Section 4](#)

## 5.0 Viewing Existing Calls

To view a list of existing calls, choose the option **Call List** from PEAK Main Menu. System default query is generated automatically at first logon Peak. The **Call List** page appears in columns with headings reflecting the core information on each call. See section on [Preferences](#) on how to customise this page.

### To End of Section 5

- [Call Reference](#)
- [Call Logger](#)
- [Reported In Release](#)
- Top Reference
- Call Type
- Priority
- [Contact](#)
- Status
- Summary
- Save Summary
- [Progress Narrative](#)
- Root Cause
- Collections Button
- Show Audit / Hide Audit
- Add Response
- Route
- Action
- Subject Product
- Products Button
- Auto Route
- Expand
- Assignee
- Clone Call
- Evidence
- Close Call Button

- Last Progress

To view the details of an existing call, from the main menu,

- Click on **Call List**, which displays the default query that would have been set up by the Peak Administrator or the last query loaded, depending upon the Preferences set.
- Identify the appropriate entry in the Call List and double click or highlight and click the **Details** button at the bottom of the page to display the **Call Details** page. The **Call Details** page is similar to the page you access when you select New Call, the difference is that information relating to the particular call is retrieved and displayed.

Details of a call can also be accessed via **Find Call** option from Peak Main page. See [Searches](#) for more details.

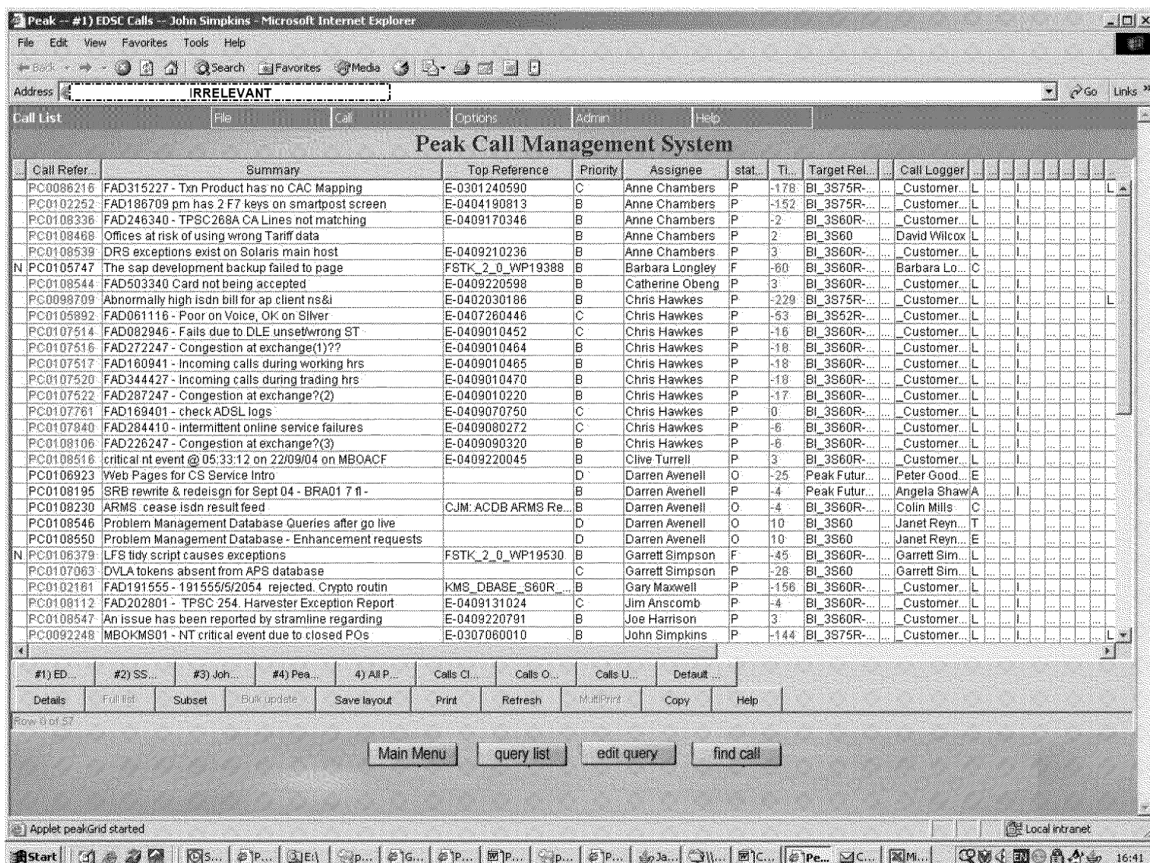


Fig 4a Peak Call List Grid [Java version] page

Peak -- 'Users Teams Open Calls' -- Catherine Obeng - Microsoft Internet Explorer

Address: IRRELEVANT

Call List

Peak Call Management System (8 new)

New/	Call Reference	Priority	Time to T	Call Ty	Summary	Assignee	Top Reference	status	Assigned Team	Target Release Ty	Target Release
<input type="checkbox"/>	PC0108083	B	3	L	MWIRAD02 - RcapCoord.1604.2376: 2 rowa penc_Unassigned_		E-0409110055	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0107767	B	3	L	FAD257508 - Rem out pouches remain in suspenAnne Chambers	Anne Chambers	E-0409070836	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0086216	C	3	L	FAD315227 - Txn Product has no CAC Mapping	Anne Chambers	E-0301240590	P	EDSC	Targeted At	BI_3575R-Provisi
<input type="checkbox"/>	PC0096124	B	3	L	Unable to commit RNB4605 Common_Install 19	Anne Chambers	E-0310070677	P	EDSC	Targeted At	BI_3570-Propose
<input type="checkbox"/>	PC0102252	B	3	L	FAD186709 pm has 2 F7 keys on smartpost scre	Anne Chambers	E-0404190813	P	EDSC	Targeted At	BI_3575R-Provisi
<input type="checkbox"/>	PC0107455	C	3	L	FAD446340 - check for marooned transactions	Catherine Obeng	E-0408250706	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0108108	C	3	L	FAD394642 & others - NBS2004091200000242	Catherine Obeng	E-0409131006	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0108270	B	3	L	tpbulkhv_tpbhv_c has abended: one row at status	Catherine Obeng	E-0409150905	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0107840	B	3	L	FAD284410 - intermittent online service failures	Chris Hawkes	E-0409060272	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0107962	B	3	L	FAD699010 - ADSL Spare - Pilot (ADSL Connecti	Chris Hawkes	E-0409100490	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0107514	C	3	L	FAD082946 - Fails due to DLE unsetwrong ST	Chris Hawkes	E-0409010452	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0107516	B	3	L	FAD272247 - Congestion at exchange(1)??	Chris Hawkes	E-0409010464	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0107517	B	3	L	FAD160941 - Incoming calls during working hrs	Chris Hawkes	E-0409010465	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0107519	B	3	L	FAD151406 - Incoming calls during trading hours	Chris Hawkes	E-0409010469	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0107520	B	3	L	FAD344427 - Incoming calls during trading hrs	Chris Hawkes	E-0409010470	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0107522	B	3	L	FAD287247 - Congestion at exchange?(2)	Chris Hawkes	E-0409010220	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0108106	B	3	L	FAD226247 - Congestion at exchange?(3)	Chris Hawkes	E-0409090320	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0108030	C	3	L	FAD053941 - CNIM Stuck in state	Chris Hawkes	E-0409130071	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0105892	C	3	L	FAD061116 - Poor on Voice, OK on Silver	Chris Hawkes	E-0407260446	P	EDSC	Reported In	BI_3552R-Provisi
<input type="checkbox"/>	PC0098709	B	3	L	Abnormally high isdn bill for sp client ns&i	Chris Hawkes	E-0402030186	P	EDSC	Targeted At	BI_3575R-Provisi
<input type="checkbox"/>	PC0106923	D	3	E	Web Pages for CS Service Intro	Darren Avenell		O	EDSC	Reported In	Peak Futures
<input type="checkbox"/>	PC0107490	B	3	L	New version of call enquiry matrix	Darren Avenell	E-0409010054	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0108230	C	3	C	ARMS cease isdn result feed	Darren Avenell	CJM: ACDB ARMS Reso	P	EDSC	Reported In	BI_3560R-Authori
<input type="checkbox"/>	PC0108192	C	3	L	FAD086937 - check for marooned transactions	Darren Avenell	E-0408230509	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0108195	B	3	A	SRB rewrite & redesign for Sept 04 - BRAD1 7 fl	Darren Avenell		P	EDSC	Reported In	Peak Futures
<input type="checkbox"/>	PC0107063	C	3	L	DVLA tokens absent from APS database	Garrett Simpson		P	EDSC	Reported In	BI_3560
<input type="checkbox"/>	PC0107678	B	3	L	NWB Authorisation agent servers: Work Thread fo	Gary Maxwell	E-0409060250	P	EDSC	Reported In	BI_3560R-Provisi
<input type="checkbox"/>	PC0108112	C	3	L	FAD202801 - TPSC 254. Harvester Exception ReJim	Anscomb	E-0409131024	P	EDSC	Reported In	BI_3560R-Provisi

Rows = 76 -- Last Refresh at 2004-09-16 16:43:07.

Fig 4b Peak Call List Grid [HTML version] page

## Fields on the Call Details page;

### 5.1 Call Reference

Reference is a unique number identifying each call. Once a call number has been assigned, after creating a new call, it is treated as an existing call. To view it, you can do a [Find Call](#) or load the [Call List](#) page; both options are available from the Peak Main page.

### 5.2 Call Logger

Customer raised calls will display the default Gateway Team else the user who generated the call's name appears in the field.

When a final response is placed on a call, it is automatically routed to the call logger.

### 5.3 Target Release

Once a call has gone beyond the Target date, the Target Date column in the Call List page gets displayed in colour red.

Real-time countdown, does not take core hours, weekends or Bank Holidays into account.

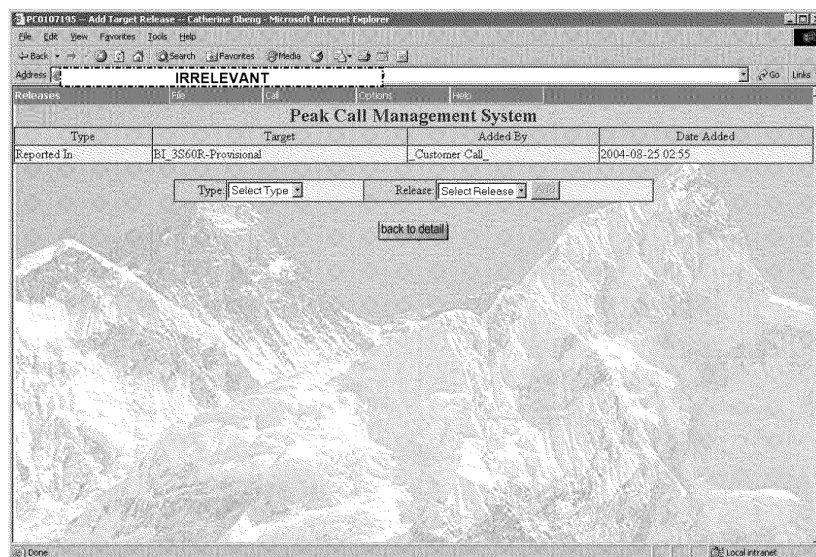


Fig 5 Target Release form

### 5.4 Contact

If call is a Customer raised one, then the Gateway Team's name is displayed. All calls raised within Peak will display the name of the user who logged the call. This is the same detail that appears in the [Call Logger](#) field.

The field is defaulted to the default Gateway Team, if a customer raised call; else the text 'None' is displayed.

Team members can change the Contact to another team member.

### 5.5 Priority

Calls logged as 'A' priorities will appear in colour red in the **Call List** page. Priority is directly linked to the Target Date and Time of the call. Alerts may trigger on Priority changes, e.g. if current priority is a 'B' and it is changed to a 'A'.

### 5.6 Progress Narrative

Information previously added to the call appears in this box. The field shows what details of text has already occurred in relation to this call. The text displayed is read only, not editable.

**Note:**

### 5.8 Top Reference

References button is visible only from **Call Details** page. PowerHelp raised calls will display the appropriate PowerHelp Reference as the Top Reference, e.g. E-0311140001. To add a new reference;

- Click Reference button
- Choose reference type in the DDL
- Choose from the list and type in the reference in the text box next to the DDL and
- Click on Add button.

Some typical / other references include FastTrack numbers, Cloned Call reference, KEL references etc.

A mask of the expected Reference value is automatically populated into the text box in a 'regular expression' format.

Set a new reference as the top reference by choosing the Top Ref button next to the reference item.

### 5.9 Status

Field is visible in the **Call List** and also in **Call Details** page. It defines the stage in the lifecycle of the call, i.e. Open, Pending, Final or Closed. This is a system-generated field on creating a new call.

**Note:**

Peak enforces the lifecycle, this means that final response cannot be entered until the status is Pending and the call cannot be closed until the status is Final.

### 5.10 Save Summary

The Summary field can be amended as long as the call has not reached the end of its lifecycle, i.e. closed. The field has a limit of fifty characters length and its content is editable during the life of the call. Once amended, click on the **Save Summary** button to commit the changes to the database.

### 5.11 Root Cause

This field is visibly only from **Call Details** page. Root Cause can be changed only if the call is on your Team's stack. Once routed, field becomes grayed out. A Route Cause **must** be specified before a call can be closed.

To change the **Root Cause**;

- Click the downward arrow to select from the DDL

### 5.12 Route

Calls on Peak are transferred between teams and within teams to individual users using the **Route** button on the **Call Details** page. Calls can only be routed by the call assignee or by a member of his team or the central administrator. The default value is the default team of the Call Logger, unless call is a Customer raised one in which case it will always be EDSC.

To change the currently displayed value (Team);

- Click on the downward arrow
- Select from the DDL [*This will refresh the list of users in the team*]

Calls can be routed directly to members of a team. However, teams may prevent this and the call will be routed to the 'Unassignee' user. You may also search for a user by name using the popup.

### 5.13 Assignee

The user name and user team are concatenated and displayed in this field. Field is read only. The only way you can get another name to be displayed is by explicitly routing the call to another user. A call can be assigned to only one user at any one time and an action may be applied to one other user.

### 5.14 Last Progress

Displays the user, date and time of when the call last received an update in the **Response Text** or **Progress box**. See [Add Response](#).

### 5.15 Products Button

The Product button is and available from the Call Details page. Choosing this option allows you to amend product related to call. The [AutoRoute](#) button 's functionality is based on the Products button. See section on [Updating Existing calls](#).

### 5.16 Show Audit / Hide Audit

If you wish to view more than just the narrative text, then click the **Show Audit** button on the **Call Details** page. This displays audit information, which includes;

Call Type, Root Cause, and References etc. Effectively all other call attributes except Progress Text.

This button is a toggle, click to see audit information and click again to hide audit information.

### 5.17 Auto Route

Calls can be routed automatically (in which case Peak transfers the call according to the call type, subject product, product version and platform) based on the Product type.

### 5.18 Evidence

The area around the Evidence button appears in a different colour if at any stage evidence has been attached to the call. See [handling evidence](#) for more details.

### 5.19 Expand

To view the full page of **Call Details**, click **Expand** button to display the **Expanded Call Details** page. Call details can be printed and saved to a file using this option.

### 5.20 Close Call button

Close Call button available from the Call Details page and is grayed out if call is with another team that you are not a member of. You can only close a call if;

- you are a member of the assigned team
- you are a member of the call logger's team
- have Administrator privileges
- Root Cause must be set and Status must be 'Final'.

**Note:** This button's functionality is applicable only to call raised within Peak.

[Back to Top of Section 5](#)

## 6.0 Call List Page Options

Existing calls are displayed in the **Call List** grid by choosing Call List from PEAK Main Menu. The Call List grid (See Fig. 4) has several buttons, which you can click for more options.

Two versions, the default is HTML, however this should only be used if the call lists have less than 200 rows. For more than that the Java version should be used. Can switch between versions using the Preferences page. See figures 4a and 4b above.

See Call List figures in Section 5 above.

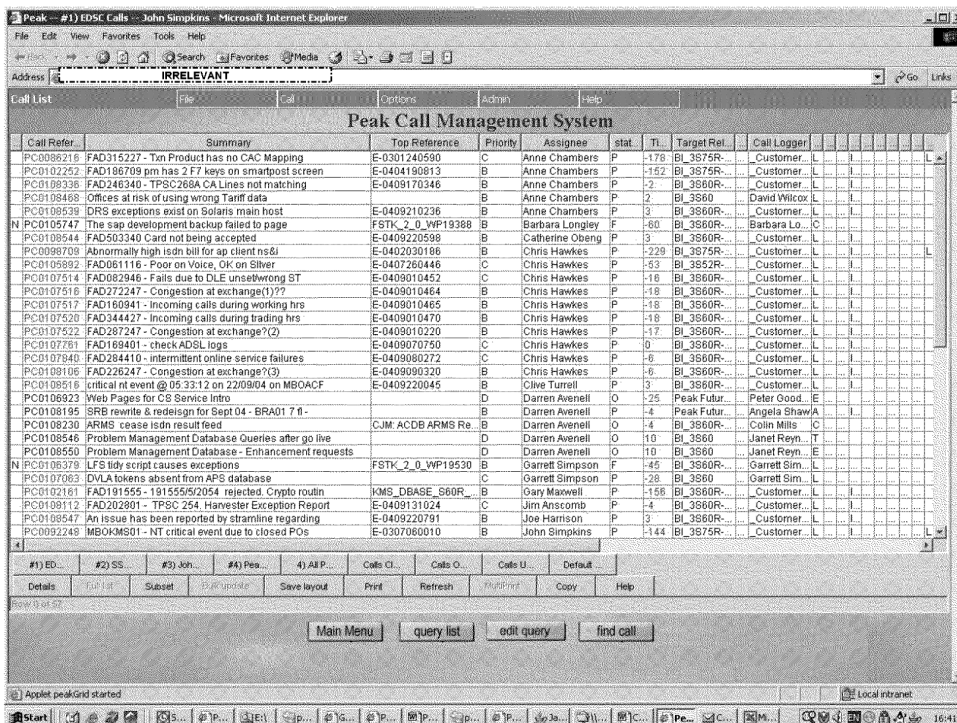


Fig 6a Call List page (Java version)

Nav/	Call Reference	Priority	Time to T	CallTx	Summary	Assignee	Top Reference	status	Assigned Team	Target Release Tx	Target Release
C	PC0108083	B	16:00	L	MWRAD02 - RtpCord 1604 2376 - 2 rows pen_	Unassigned	E-0409110055	P	EDSC	Reported In	BL_3600R-Provid
	PC0107767	B	16:00	L	FAD257600 - Rem out pouches remain in suspen	Arnie Chambers	E-0409070636	P	EDSC	Reported In	BL_3600R-Provid
	PC0065216	C	17:00	L	FAD315227 - Ten Product has no CAC Mapping -	Arnie Chambers	E-0301240590	P	EDSC	Targeted At	BL_3675R-Provid
	PC0096424	B	17:00	L	Unable to commit RNB4695 Common_Install 19	Arnie Chambers	E-0310070677	P	EDSC	Targeted At	BL_3670-Provid
	PC0102252	B	17:00	L	FAD186708 pm has 2 FF keys on smartpost s	Arnie Chambers	E-0404190813	P	EDSC	Targeted At	BL_3675R-Provid
	PC0107465	C	17:00	L	FAD446340 - check for marooned transactions	Catherine Obeng	E-0408250706	P	EDSC	Reported In	BL_3600R-Provid
	PC0008108	C	17:00	L	FAD394642 & others - NBS200409120000242	Catherine Obeng	E-0409131006	P	EDSC	Reported In	BL_3600R-Provid
N	PC0108270	B	17:00	L	tpbulkr_btbw_c has abended one row at statu	Catherine Obeng	E-0409150905	P	EDSC	Reported In	BL_3600R-Provid
	PC0107040	B	17:00	L	FAD284410 - Intermittent online service failu	Chris Hawkes	E-0409080272	P	EDSC	Reported In	BL_3600R-Provid
	PC0107962	B	17:00	L	FAD899010 - ADSL Spare - Pilot (ADSL Connect	Chris Hawkes	E-0409100490	P	EDSC	Reported In	BL_3600R-Provid
	PC0107514	C	17:00	L	FAD062946 - Falls due to DLE unsetwroing ST	Chris Hawkes	E-0409010452	P	EDSC	Reported In	BL_3600R-Provid
	PC0107646	B	17:00	L	FAD272247 - Congestion at exchange(1)??	Chris Hawkes	E-0409010464	P	EDSC	Reported In	BL_3600R-Provid
	PC0107517	B	17:00	L	FAD160941 - Incoming calls during working hrs	Chris Hawkes	E-0409010465	P	EDSC	Reported In	BL_3600R-Provid
	PC0107519	B	17:00	L	FAD151408 - Incoming calls during trading hrs	Chris Hawkes	E-0409010469	P	EDSC	Reported In	BL_3600R-Provid
	PC0107520	B	17:00	L	FAD344427 - Incoming calls during trading hrs	Chris Hawkes	E-0409010470	P	EDSC	Reported In	BL_3600R-Provid
	PC0107622	B	17:00	L	FAD287247 - Congestion at exchange?()	Chris Hawkes	E-0409010220	P	EDSC	Reported In	BL_3600R-Provid
	PC0108196	B	17:00	L	FAD226247 - Congestion at exchange?()	Chris Hawkes	E-0409090320	P	EDSC	Reported In	BL_3600R-Provid
	PC0108030	C	17:00	L	FAD053940 - CNIM Stuck in state	Chris Hawkes	E-0409130071	P	EDSC	Reported In	BL_3600R-Provid
	PC0105692	C	17:00	L	FAD061116 - Poor on Voice_OK on Silver	Chris Hawkes	E-0407260446	P	EDSC	Reported In	BL_3625R-Provid
	PC0098789	B	17:00	L	Abnormally high idn bill for ap client nsd	Chris Hawkes	E-0402030186	P	EDSC	Targeted At	BL_3675R-Provid
	PC0106923	D	17:00	E	Web Pages for CS Service Intro	Darren Avenell		O	EDSC	Reported In	Peak Futures
	PC0107490	B	17:00	L	New version of call enquiry matrix	Darren Avenell	E-0409010054	P	EDSC	Reported In	BL_3600R-Provid
	PC0108230	C	17:00	L	ARMS cease idn result feed	Darren Avenell	C.M. ACDB ARMS Res	O	EDSC	Reported In	BL_3600R-Autho
N	PC0108192	C	17:00	L	FAD088937 - check for marooned transactions	Darren Avenell	E-0406230509	P	EDSC	Reported In	BL_3600R-Provid
N	PC0108195	B	17:00	A	SRB rewrite & redesign for Sept 04 - BRAD1.7 f	Darren Avenell		P	EDSC	Reported In	Peak Futures
	PC0107063	C	17:00	L	DVLA tokens absent from APS database	Garrett Simpson		P	EDSC	Reported In	BL_3600
N	PC0107078	B	17:00	L	NWB Authorisation agent servers. Work Thread	Gary Maxwell	E-0409060250	P	EDSC	Reported In	BL_3600R-Provid
	PC0108112	C	17:00	L	FAD202801 - TPSC 254. Harvester Exception	Rejm Anscomb	E-0409131024	P	EDSC	Reported In	BL_3600R-Provid

Fig 6b Call List Page (HTML version)

## To End of Section 6

- [Details](#)
- [Full List](#)
- [Subset](#)
- [Bulk Update](#)
- [Save Layout](#)
- [Print](#)
- [Refresh](#)
- [MultiPrint](#)
- [Help](#)

Imagine

### 6.1 Details button

To view details of a call, highlight the call from the Call List grid and click this button. The Call Details page appear, (see Fig 6) double click call row.

### 6.2 Full List button

To display all calls matching your query, click on this button; click again to return from a [Subset](#) operation.

If you have already displaying a subset of calls, you can use the Full List button to return to the complete query Call List. You can toggle between these lists by using the Subset and Full List buttons.

### 6.3 Subset button

You can arrange for a subset of the calls to be displayed;

- Highlight the relevant calls by holding down Ctrl and clicking on the appropriate entry (use the tick boxes in the HTML version)
- Click the **Subset** button

*Note: The Subset Call List grid is similar to the Full List grid except all the Buttons are activated.*

### 6.4 Bulk Update

Displays a list of calls, which needs to be updated with similar information. This button is grayed out by default.

For example where more than one call needs updating with the same type of detail e.g. Call Type, Priority, you can do so by choosing the **Bulk Update** option from the **Call Details** page.

- Identify the appropriate calls that you wish to update
- For multiple selection, hold down the **Ctrl + click** on the individual calls use the tick boxes in the HTML version (immediately upon the a second call being selected, the Bulk Update button becomes activated)
- Click **Bulk Update** button this opens up the **Multiple Call Update** form page.

The screenshot shows a web browser window titled "Multiple Call Update... Catherine Obeng - Microsoft Internet Explorer". The address bar contains "IRRELEVANT". The main content area displays the "Peak Call Management System" form. The form includes several sections:

- Reported In:** A dropdown menu set to "No Change".
- Call Type:** A dropdown menu set to "No Change".
- Top Collection:** A dropdown menu set to "No Change".
- Summary:** A text input field.
- Top Reference:** A dropdown menu set to "No Change".
- Priority:** A dropdown menu set to "No Change".
- Selected Call List:** A dropdown menu set to "FC0106971".
- Progress Test:** A large empty text area.
- Response Category:** A dropdown menu set to "Progress Only".
- Target Date:** A text input field with the format "dd/mm/yyyy".
- Target Time:** A text input field with the format "hh:mi".
- No Forecast:** A checkbox.
- Subject Product:** A dropdown menu set to "No Change".
- Manual Routing:** A dropdown menu set to "No Change".
- Group Only:** A dropdown menu.
- Save:** A button.
- close window** and **Main Menu** buttons are located at the bottom of the form.

Fig 7 Multiple Call Update form

### 6.5 Save Layout button

Following manipulation of the Call List grid (see [Customising Call List grid](#)), click this button if you wish for the system to remember the new settings for future.

### 6.6 Print

Print the Call List grid as a landscape table.

*Note: A pop up Printer information window will enable user to select to which Printer to print to.*

### 6.7 Refresh

A Preference can define an automatic refresh period; the time of the last refresh is displayed at the bottom of the page.

### 6.8 MultiPrint

This allows printing in the Expanded call Details for each of the call selected. By default, button is greyed out, to print more than one call,

- Hold down **Ctrl + click** on the individual calls you wish to print (HTML uses tick boxes)
- Click on **MultiPrint** button

## 6.9 Help

Click this button to access the Help document online.

## 6.10 Personalised Query Buttons

Rows of buttons representing the user-defined queries are displayed. Only the first nine queries are displayed in alphabetical order. Press the appropriate query button to display that call list.

[Back to Top of Section 6](#)

## 7.0 Updating Existing Calls

To add more details to an already open call, while in Peak Main Menu page, click **Call List**.

This will display the **Call List** page, if the call is visible from the list, and then double click to open or give focus to the call in the list and press the Open button at the bottom of the page or use Find Call from main menu page.

To End of Section 7

- Action Button
- Add
- Add Response Button
- [Call Reference](#)
- Clone Call
- Close
- Close Window
- Contact
- Evidence
- Expand
- Hide/Show Audit
- Inline Link
- Main Menu Button
- Print
- Priority
- Products
- [References Button](#)
- Root Cause
- Route
- Search KEL
- Site
- Status
- Summary
- [Target Release](#)

- [Updating Existing Call Details](#)

## 7.1 Update Existing Call Details

Details of existing calls can be viewed by choosing **Call List** from the Peak Main Menu page. This triggers the Calls grid to be displayed. The content of the list is dependent on the users choice of default Query. On first logon, the list will default to all calls currently opened in the user's Default Team.

- Identify the appropriate entry in the list and double click on it to display the call details. You can also access the Call Details page by clicking once on the appropriate call in the list and clicking on **Details** button at the bottom of the page.
- Click **Call List** to display the Call Details page.

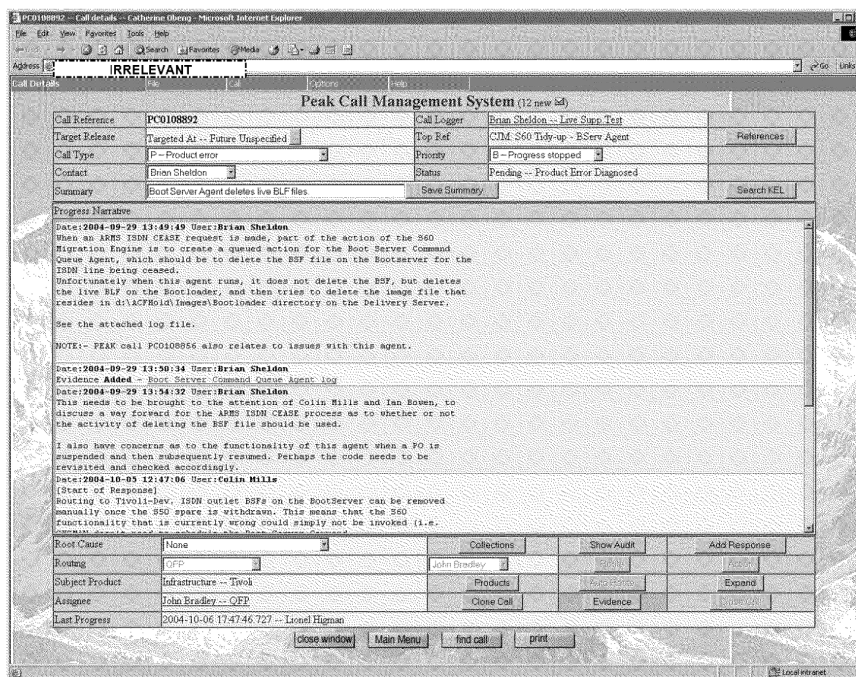


Fig 8 Peak Call Details page

## 7.2 Call Reference

A unique system generated number that gets assigned to each call within Peak.

## 7.3 Target Release

This tracks the software releases over the course of the Project. It indicates at what phase in the Release a fault became apparent. All faults reported must have a target release associated with it, to select a valid target release,

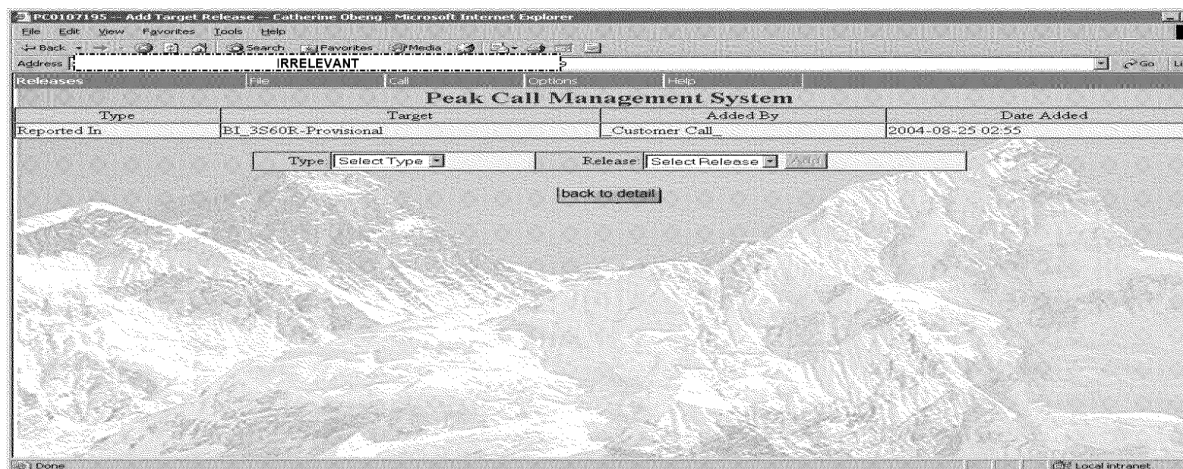


Fig 9 Target Release page

- Click icon
- Select Type from DDL
- Select release
- Click Add

The Target Release of a call can be changed throughout the lifecycle of a call. If call is closed, the text in the field becomes greyed-out.

All roles may be set the “Reported In” release but the ‘Target At’ option is only available to roles with Administrative privileges.

#### 7.4 Call Type

The Call Type can be changed many times during the lifecycle of a call. Ability to do this is role dependent. Call Type can be changed even if the call is outside the user’s default team. Field is greyed out if call is closed.

- Click the downward arrow
- Select from the DDL, the new value will overwrite the previous. (The Call Type chosen might cause only a subset of the **Priority** list to be displayed)

*Note: If your current priority becomes invalid, it will change to lowest possible priority.*

**Note:**

#### 7.5 References button

If a Customer raised call, the PowerHelp reference is displayed in the field. This reference can never be overwritten. However, the option remains for the user to

choose whether that reference gets displayed as the 'Top Ref' or not. For Peak raised calls, the default is the Peak unique number. In this case, the field is blank, i.e. no value is displayed, however more references can be added.

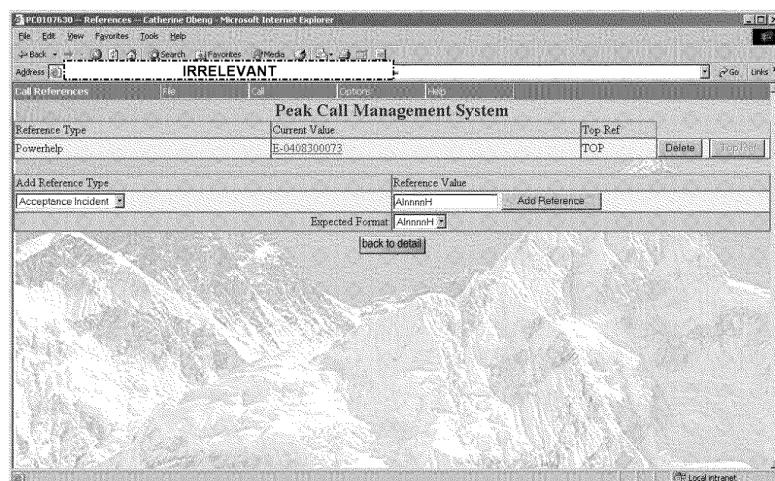


Fig 10 References page

- Click on References button, the References form appears;

### 7.5.1 Add References

- Select the Reference type from the DDL.
- Enter a value for **Reference value**. The expected format for the chosen Reference type will be displayed in the cell below. This format is mandatory.
- Click on **Add** button. The Reference is now added to the list in the above box.

#### Note:

### 7.5.2 Delete Existing References

Only a reference generated with Peak can be deleted. For example, PowerHelp reference is static and can never be removed.

- Click on the **Delete** button, this removes it from the list.

### 7.5.3 Mark Reference as Top Reference

The first reference to be added to the list is considered to be the Top Reference and is the one displayed on the **Call List** and the **Call Details** pages. To nominate an alternative:

- Click on the **Top Ref** button, the word 'TOP' appears in the column title 'Top Ref'
- Click on the Top Reference button.

## 7.6 Search KEL

Highlight any text or phrase in the Progress Narrative and click on this button to access any KELs that contain that keyword.

## 7.7 Summary

The text in the Summary box can be changed as many times as is required throughout the life of the call.

- Click in the box
- Delete part or all of existing text
- Type in new text
- Click on **Save Summary** button to the right of input box to commit the change to Peak database

Text in Summary box appears in greyed mode if the user's role does not allow changes or if the call is closed.

## 7.8 Products

Choosing this option from the Call Details page can amend details of the product. See Updating existing calls.

- Click on Products button, this displays the **Product Details** page

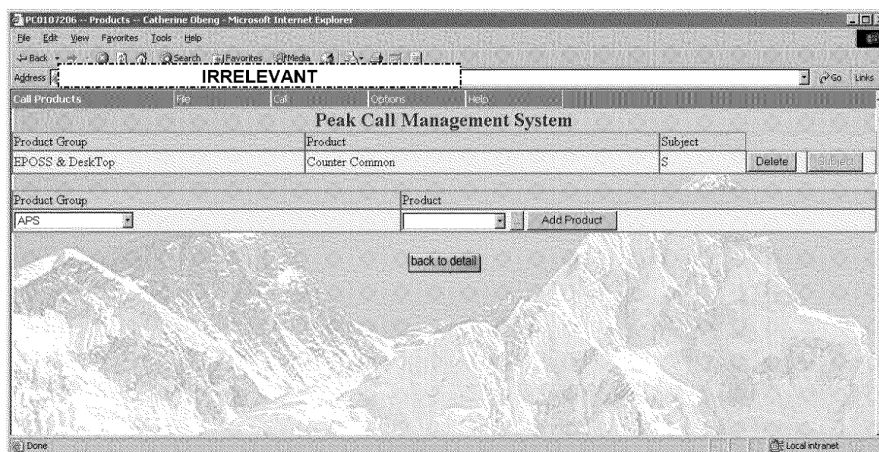


Fig 11 Products page

- Click the down arrow of the **Product Group** field to display the DDL
  - Click on your choice of **Product Group**, this will cause a subset of related products to be available in the Products field
  - Click on the down arrow of the Product to display the DDL
  - Click on your choice of Product name
  - Click **Add Prod** button, this will place the chosen product in the List box above
- Search can be by a Product name using the pop-up.
- To make a particular product appear as the **Subject Product** in the **Call Details** page,
- Click on the Subject Product button next to the product

To remove a particular product from the list, simply click the **Delete** button next to the product.

- Click **Back to Details** to leave this page.

## 7.9 Add Response button

This button is visible only from the Call Details page. To add new information to the call;

- Click on **Add Response** button, this opens the 'Add Response' form with three input box
- Type in text
- Click Save button.

### 7.9.1 Progress Narrative box

Information that has already been added to the call is displayed in this box. The content might have been transferred to Peak via the OTI this could be text input into Progress box of the New Call form within Peak when the call was first being generated. The text is not editable.

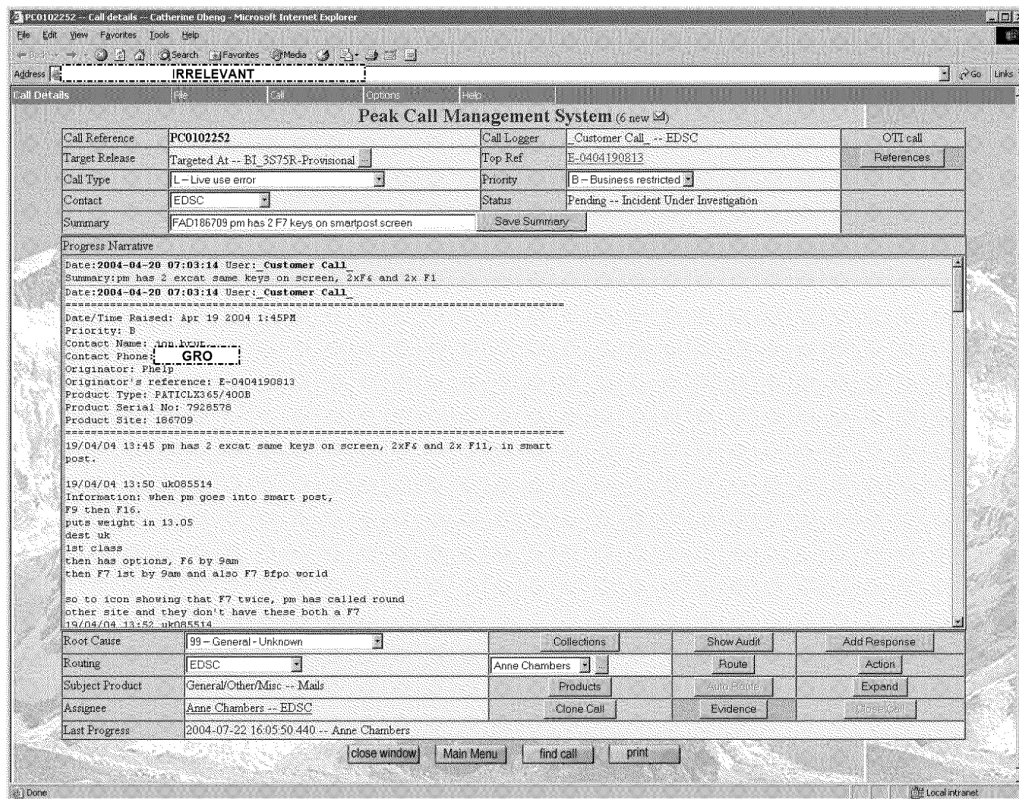


Fig12 Progress Narrative page

**Note:** Must select a [Response Category](#)

### 7.9.2 Text box

Text input into this box is only visible to Peak users. The content does not get transferred across the OTI to interface with other CMSs. This is for the benefit of Development Teams to add update, which they do not wish for the Customer to see or know about. If you require the text update to be readable from within and other CMSs then, use the Response Categories.

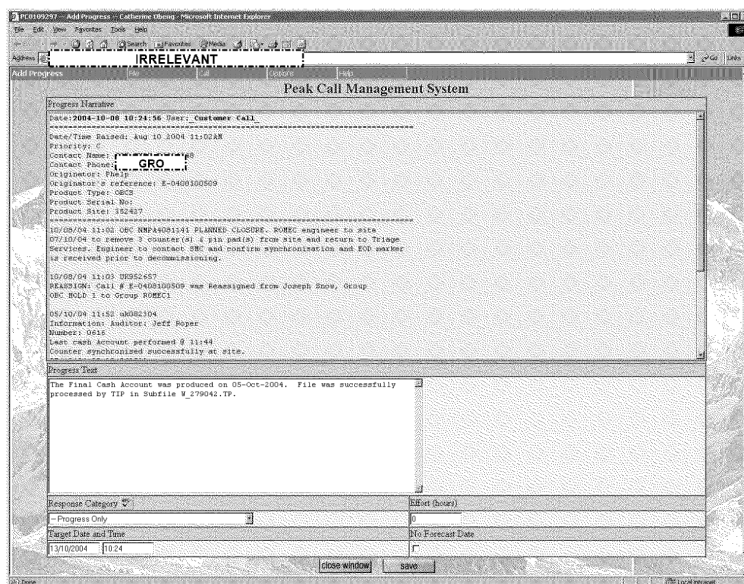


Fig 13 Progress Text Input window

### 7.9.3 Inline Link

Text highlighted in blue in the Progress Narrative window indicates a link to files such as: Evidence, OCPs, OCRs, CSPCs and SCKEL that is attached to the call.

- Click once to access details of that item.

### 7.9.4 Response Category

- Click on the down arrow
- Select the appropriate response code from the DDL
- Click **Save** button to commit changes, which will go across the OTI link.

If you do not wish to save the update, click on **Back to Details** button.

#### Note:

### 7.9.5 Close window button

- Click on this button to abandon all changes on the form and return to the Call Details page.

### 7.9.6 Effort

Time record of the amount of time the current user has spent working on the call.

### 7.9.7 Target Date / Time

See section 4.8 and 4.9.

### 7.9.8 No Forecast Date

Tick this box to overwrite the Target Date and Time functionalities.

### 7.9.9 Close Window

Click to close the Add Response form window. Automatically returns to the Call Details page of the call.

### 7.9.10 Save

For OTI users, click this button to send the new text across to PowerHelp.

### 7.9.11 Site

Provides a direct link to all current logged calls from that office.

### 7.10 Clone Call button

Customer raised calls are governed by SLA's which must be met within a specified timeframe depending on the priority of the call. As a result, if a workaround is found to a fault while a proper fix is being developed in the interim, then the original can be duplicated to help keep track of the problem and a final resolution. Button is activated only from the Call Details page.

- Click Clone
- Confirm 'Yes'

### 7.11 Action button / Remove Action

Places an Action on a team to ensure that they carry out certain task(s) on the call.

- Select the name of the User you wish to place an action on,
- Click on the **Action** button to place action a particular team or user

The button is a toggle, click once to place an **Action**, click again to **Remove Action**.

*Note: The User placing the action will not see any change except in the Audit Trail of the call that an action has been placed.*

### 7.12 Close window button

Click to close the Call Details page window.

### 7.13 Main Menu button

- Click on this button to return to the Peak home page.

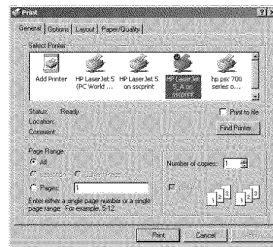
#### 7.14 Find Call button

- Click to invoke the Quick Search form.

#### 7.15 Print

Printing from this page will only print the current page, WYSIWYG.

Click will caused the Printer menu to appear:



*Fig 14 Print Menu*

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## 8.0 Closing and Reopening Calls

There are two classifications of calls within Peak, Customer Calls and Peak (Internal) Calls. Internally raised calls do not have PowerHelp call reference assigned. Only Customer raised calls which are logged via HSH (Horizon Helpdesk) and assigned to EDSC will have PowerHelp call references. Such calls come across the OTI interface before being opened in Peak.

To close and reopen calls in Peak, first locate the call either from the Call List page or by doing a search, [Find Call](#).  
Access the Call Details page.

[To End of Section 8](#)

- [Close Peak Call](#)
- [Close OTI Calls](#)

### 8.1 To Close a Peak Call (Internally raised)

Calls can be closed in two ways.

Calls raised within Peak, can only be closed via the Call Details page.

If you do not wish to add any further update to the call before you close it, then from the Call Details page:

➤ Click **Close Call** button

Note: that the Close Call button is only activated from the Call Details page where the call was raised in Peak only.

Also, you must have a Root Cause selected and the Status must be 'Final' before call will close.

- Click in the [Response Text](#)
- Type in text update
- Click down arrow on [Response Category](#)
- Select a **Final** category from the DDL, only one Final code exist for Internal calls, you are returned to the Call Details page
- Click **Save** button at the bottom of the page, call is now closed.

#### 8.2.1 Reopening Peak Call (Internal)

This button toggles between Close Call and Reopen Call functionalities. To re-open a closed call,

- Locate the call either from the Call List page or by doing a search
- If call is located in the Call List, double click on it or
- Click on the call in the list and click **Details** button on **Call Details** page
- Click Reopen Call button, call is immediately opened.

Full functionality is returned, all text now appear in normal mode.

### 8.2.2 Re-Opening Peak Closed Call (OTI)

OTI calls may not be reopened in Peak. If the call has not yet been closed on PowerHelp, then the call may be resent across the OTI into Peak and the call will automatically reopen in Peak. If the call was closed on PowerHelp, a new call must be raised.

[Back to Top of Section 8](#)

## 9.0 Saving a Call as a File

Copy the contents of a call and save it to your local PC.

To save the details of a call to file, you must be in the Expanded Call Details page.

- Click **Expand**, this displays the Expanded Call Details Page

[To End of Section 9](#)

- [Expand Call Details](#)

### 9.1 Expand Call Details page

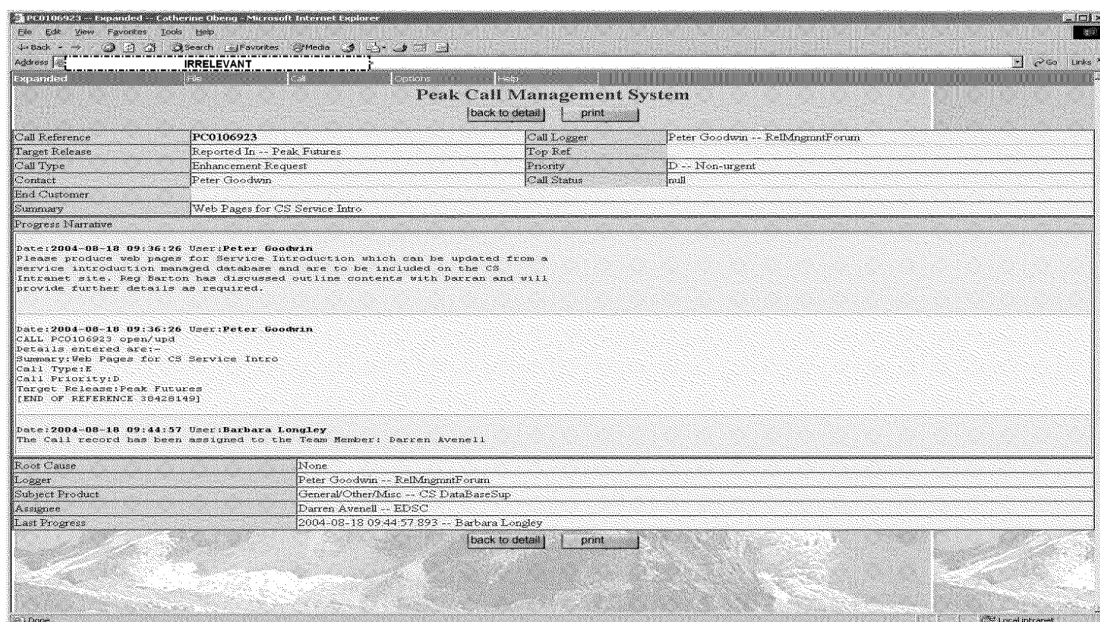


Fig 15 Peak Call Details Expanded page

- Click **Save As** from the **Explorer File menu**, information box appears
- Accept or Decline, if you accepted, a standard Microsoft Save As window is displayed and defaulted to your local Drive
- Type in the filename and Click **OK** to save.

**Note:**

## 10.0 Queries and Searches

To End of Section 10

- Build and Stored Query
- Query List
- Find a Call

### 10.1 Build and Store Query

To view a list of existing calls, choose the option **Call List** from PEAK Main Menu.

Create a query or several queries that can be saved in the Query List for future use. Option is accessible from Peak Main page, which gets displayed immediately after successful login.

The Administrator will create a default query to enable new users to be able to load up the Call List on first logon. This query can be edited after first logon using the Query List option from Peak Main Menu page.

#### 10.1.1 To Create new Query

➤ Click Query Builder option, the Customise Searches form is displayed

OR

➤ From the Call menu, click Build Query button.

The screenshot shows the 'Peak Call Management System' Query Builder interface. The browser window title is 'Peak - Query Builder - Call Centre Billing - Microsoft Internet Explorer'. The address bar shows 'http://localhost:8080/peakservlet/BuildQuery'. The main content area is titled 'Peak Call Management System' and contains the following fields and controls:

- Search Title:** A text input field.
- Field to be compared:** A dropdown menu with 'Actioned Flag' selected.
- Operator:** A dropdown menu with 'Equal To' selected.
- Value:** A text input field with 'Internal External' and a dropdown menu for 'Expected format: Internal External'.
- Buttons:** 'Add (end)', 'Add (or)', 'Parse Query', 'Clear Query', 'Set as Default Query', and 'Share Query'.
- Peak Query Code:** A text input field.
- SQL Query Code:** A text input field.
- Available Sort Fields:** A list with 'Actioned Flag', 'Actioned Team', and 'Actionee'.
- Order Direction:** A dropdown menu with 'Ascending' selected and buttons for 'Add Ordering' and 'Remove Ordering'.
- Ordered Fields:** A list with 'All Fields' selected.
- Available Display Fields:** A list with 'Actioned Flag', 'Actioned Team', and 'Actionee'.
- Displayed Fields:** A list with 'Call Reference'.
- Buttons:** 'Retrieve Query', 'Save Query', 'Run Query', and 'Main Menu'.

*Fig 16 Peak Customise Searches form*

### 10.1.2 Customise Searches form

The form has several parts and functionalities. Search can be based on just one criterion of any particular column or several.

### 10.1.3 Search Title

For queries that are to be stored and retrieved in future, it is recommended that the user type in some descriptive text to distinguish the query from others. The query search will be successful however, with no title, it will be difficult to identify the type of query it is.

- Click in the box
- Input text

The text in this field will be displayed as the page title in the Call List if and when the query is successful.

### 10.1.4 Field to be compared

The DDL contains columns in the Peak Database that are most likely/most frequently searched on. List appears in alphabetical ascending order with the first in the list displayed when form loads up. If the column you wish to search is not listed, then email the Administrator to ask if it is possible to add it to the list, `peak@IRRELEVANT`.

- Click down arrow, the DDL displays several columns
- Select the column you wish to search on.

### 10.1.5 Operator

This is the operator such as Greater Than or Less Than, and a value. For example:

Status 'Not Equal To' C (Closed)

Such query will display all calls, which have a Status of Open, Pending OR Final.

### 10.1.6 Value

The query will return a value/values only if the value that appears in this field is true. Click on the down arrow, the LoV allowed are displayed

- Select the appropriate value from the DDL or type text directly
- Click Add (and) button, this causes the SQL statement to be displayed in the Peak Query Code box blow.

### 10.1.7 Add (AND) button

To enter a search where more than one criterion applies, enter the first criterion in the Field to be compared, Operator, Value fields and click the Add (and) button. The other functionality of the Add (and) button produces results where all conditions are true. Equivalent to the Logical AND operator where all conditions have to be True for the query to be fulfilled.

- Click button, the SQL statement appears in the Peak Query Code window below.

The content of the Peak Query Code field can be edited. You can also type in your own SQL statements if you do not wish to use the DDLs provided.

### 10.1.8 Add (OR) button

To enter a search where more than one criterion applies, enter the first criterion in the Field to be compared, Operator, Value fields and click the Add (or) button. The other functionality of the Add (or) button is it produces result where a condition is true, this is equivalent to the Logical OR operator, where any one condition has to be True for the query to be fulfilled.

- Click button, the SQL statement appears in the Peak Query Code window below.

Example

If you make the following entries:

Call Reference GREATER THAN PQ00976

OR Priority EQUAL TO 'A'

This will select all 'A' priority calls and all calls with a Call Reference more than PQ00976

### 10.1.9 Parse Query button

Parse the Query text into SQL again is useful for converting Pinicl queries. However its primary functionality is to check the validity of any raw Peak Queries that users might input into the Peak Query Code window. This is how brackets should be entered or existing queries edited.

- Click Parse Query button

### 10.1.10 Clear Query button

If you wish to delete all entries from the Customise Searches form,

- Click on Clear Query button, this removes all the contents from the form
- Click Main Menu button at the bottom of page to exit from the form completely.

### 10.1.11 Peak Query Code

When you click on Add (and) and Add (or), the selected SQL statement is displayed in this box. The content of the **Peak Query Code** box can be edited. For instance, you

can add parentheses to ensure that the correct search is performed. You can also type in your own text if you do not wish to use the DDLs provided, assuming that you are conversant with the exact format of the search strings.

Note: Only type in your own queries if you have extensive knowledge of the underlying views and tables in the Peak Database. If you type in a column name that is not in the views used in Peak, your query will not be successful.

Email the Administrator to verify that you can search on the particular column,

peak@[GRO]

#### 10.1.12 SQL Query Code

The system uses this box to display the underlying views and tables it will be using based on your criteria in sections [4.1.4](#). Field is editable depending upon the role of the user.

#### 10.1.13 Set as Default Query Check Box

Checking this box will load the query automatically upon logon. If you wish to define a different format then leave this box unchecked.

#### 10.1.14 Shared Query

All shared Queries can be listed and executed from the Query List page.

#### 10.1.15 Sort Fields

Select from this field the column on which you wish for your query to ordered. If you make a selection from this field, you must also choose from the Order Direction DDL. The result will be sorted on the basis of the fields you choose in the Call List page.

- Click down arrow to display DDL
- Select column/s from list.

#### 10.1.16 Order Ordering

Default value is Descending Order unless you explicitly choose the alternative from the DDL. DDL contains only two options, i.e. Ascending or Descending order.

- Click down arrow to display DDL
- Select the alternative sort order.
- Click Add Ordering to include the Sort order in your SQL query

#### 10.1.17 Add Direction

- Click this button to confirm the selections made in [Section 10.1.4](#) only one column can be sorted on at a time.

### 10.1.18 Remove Ordering

A list of columns displayed in the 'Ordered Fields' can be removed by

- Click on the column name in the Ordered Fields
- Click Remove Ordering button

### 10.1.19 Available Display Fields

This selects the fields to be displayed in the call list. The default is to show all fields but it is best to customise this to just those fields you are interested in appearing in the Call List page.

The DDL does not contain the column, **Call Reference** because it is a mandatory column it defaults in [Display Fields](#) display list box.

- Click down arrow to display DDL
- Select from list
- Click **>Add Field>** button to select additional fields.

Multiple rows can be selected from the DDL. The selected rows are displayed in the Displayed Fields box.

### 10.1.20 All Fields

This box is linked to **Available Display Fields** functionality. Default is checked, click in box to uncheck box. Unchecking this box causes the **>Add Field>** and **<Remove Field<** buttons to be activated.

### 10.1.21 >Add Field>

The **All Fields** box must be unchecked for this button to become activated.

- Click down arrow on Available Display Fields
- Select from DDL
- Click this button to include column in [Call List](#) display page

### 10.1.22 <Remove Field<

All Fields box must be unchecked for this button to become activated.

### 10.1.23 Removing a Field

If you wish to remove a field, highlight it in the Displayed Fields box and press the Remove Fields button.

#### 10.1.24 Display Fields

Functionality is linked with Available Fields and >Add Field>. Each entry you select from '**Available Display Fields**' will appear in the **Display Fields** DDL. Default is 'Call Reference', appears in the field which a mandatory value which cannot be removed using the <**Remove Field**> button. A warning message appears if an attempt to remove it.

#### 10.1.25 Retrieve Query Button

- Click this button to display the Query List page  
Functions as a toggle between Customise Searches form and Query List page.

#### 10.1.26 Execute Query

- Click this button for the selected criteria to be searched against the Peak Database.

If query is successfully, the system will automatically open the Call List page displaying all calls that matched your criteria.

#### 10.1.27 Save Query

- Click to store the SQL statement displayed in the Peak Query Code window for future use. The query will then appear in the Query List the next time you run this option from Peak Main page.

#### 10.1.28 Main Menu

- Click this button exit the **Customise Searches** form completely.

Related Topics:

[Find Call](#), [Full Search](#)

## 11.0 Query List

The initial call list is set as your Default query, but can be amended by clicking the Query List from the Peak Main page.

New users will access the Call List on first logon using a default query set up by the Administrator. After the query has successfully loaded, the user can choose to amend the query or delete it altogether and create a new one more which might be preferable.

Once a query has been generated and saved using the Query Builder options, the query is added to the existing list of queries. Query List option is accessible from Peak Main menu page, to display the list,

- Click Query List, the Custom Searches page is displayed

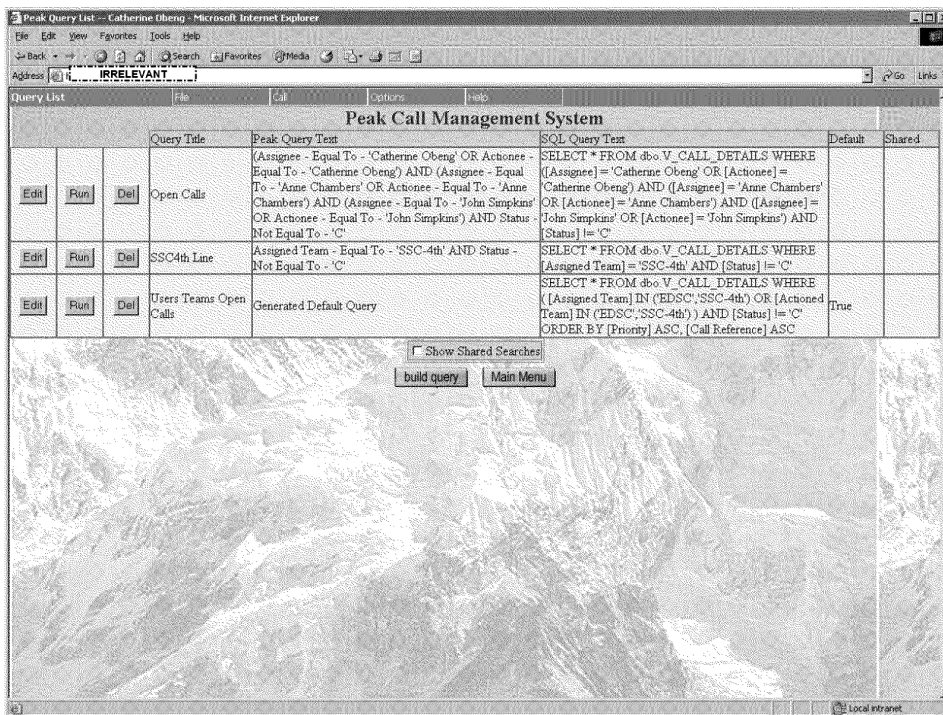


Fig 17 Peak Query List page

Three options existing on this page, Edit, Run or Delete

### 11.1 Add Queries

- Click Query Builder to access the Customise Searches form page to create a new query.

### 11.2 Editing Existing Query

If you wish to amend any of the existing queries in this list,

- Click the **Edit** button next to the Query you wish to amend the Custom Searches form is displayed

Details of the current SQL statements are displayed.

Amend details as is required. See [Build a Query](#).

### 11.3 Run

Click this button next to the query you wish to load the Call List page is displayed with the result of the query.

### 11.4 Delete

- Click on this button next to the Query you wish to remove from the list.

Once a query is deleted, it is completely removed from the Peak Database.

Note: At least one query must remain in the list for the system to load automatically upon logon.

### 11.5 Default

This column displays a query in the list stored as your Default query, which appears in the Call List upon logon. The default query in the list will have a setting of True and False for all other Queries.

You can change the default query in the list. This option can be set via Customise Searches form.

- Click on Query Builder button, Customise Searches form is displayed
- Check the Set as Default box
- Click **Save Query**.

See section 2.1 on how to build a query.

The next time you login into Peak, it is this query that will load into the Call List page.

### 11.6 Show Shared Searches

Tick this option to show all the shared queries.

These queries may only be run.

**Note:**

### 11.6 Query Build button

Clicking this button will load up a blank [Customise Searches](#) form page ready to receive new input.

(To build a new Query, exit page and choose Query Builder from Peak Main page.)

### 11.7 Main Menu button

- Click to exit from the Query List page and return to Peak Main page.

## 12.0 Search for a Single Call

Searching for individual calls in Peak. Search is based on Peak unique number. Queries can be saved in the Query List for future use. This option is accessible from Peak Main page, which gets displayed immediately after successful login.

The Administrator will create a default query to enable new users to be able to load up the Call List on first logon. This query can be edited after first logon using the Query List option from Peak Main Menu page.

Peak Client offers two methods of searching for calls: **Find Call** which provides a facility for searching based on only one field or Query Search which allows you to construct complex search criteria and define a specific layout for the resulting Call List page.

### 12.1 Find Call Option

Simple searches based on Peak call reference number, one of the other reference numbers (e.g. PowerHelp or Customer reference).

Select **Find Call** option from Peak Main menu page, the **Quick Search** page is displayed.

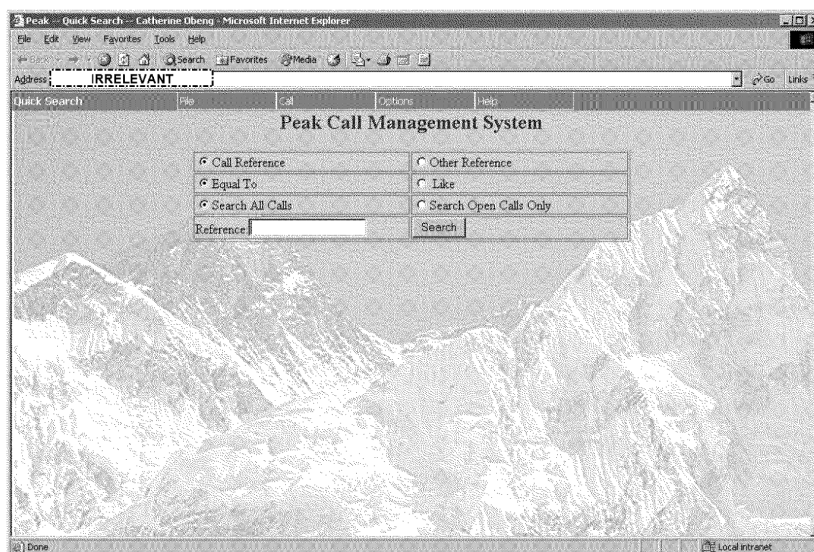


Fig 18 Peak Quick Search form

### 12.1.1 Call Reference (other Reference) radio button

Select one of these and select the match criteria either EQUAL TO or LIKE. Enter the value in the Value field for 'Like' searches where appropriate. No wild cards accepted in this field. Click on the Radio button **Search All Calls** or **Search Open Calls Only**.

The full Peak number with prefix of 'PC' is not mandatory for searching Call References. Example, keying in just the actual number [seven digits] is sufficient, Peak will insert the 'PC' before starting the searching.

**Note:**

### 12.1.2 Search All Calls radio button

If the status of the call is unknown to the user, then check this Radio button. The search will encompass all calls on currently on the Live Database Server, Peak1.

### 12.1.3 Search Open Calls radio button

If you require a search to include only open, select this option. This and Search Open Calls Only Radio buttons are mutually exclusive. Unchecking one will automatically cause the other to be selected.

If more than one result is returned, they will be displayed in the call list grid.

### 12.1.4 Full Search Query Builder

A full search allows complex searches based on several different fields. The search statement is built up as you specify the elements and you are then able to alter it or add parentheses. Select Query Builder from Peak Main page. The **Customise Searches** form page is displayed. See section 4.1.1 above.

### 12.1.5 Search button

➤ Click on this button to start search on Peak Database.

Successful query will display the Call Details page of the call specified in the search query.

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## 13.0 Evidence Handling, Cloning and Printing

- [Manage Evidence](#)
- [Clone Call](#)
- [Print](#)

### 13.1 Managing Evidence

Aside from the text input which can be directly input onto a Peak call directly using the Add Response Text button, extra information such as log file, messagestore extracts etc can added.

#### 13.1.1 Already Attached Evidence

On opening a call in the Call Details page, if the call already has other evidence attached, the Evidence button appears in a different background colour (see Fig 11 below).

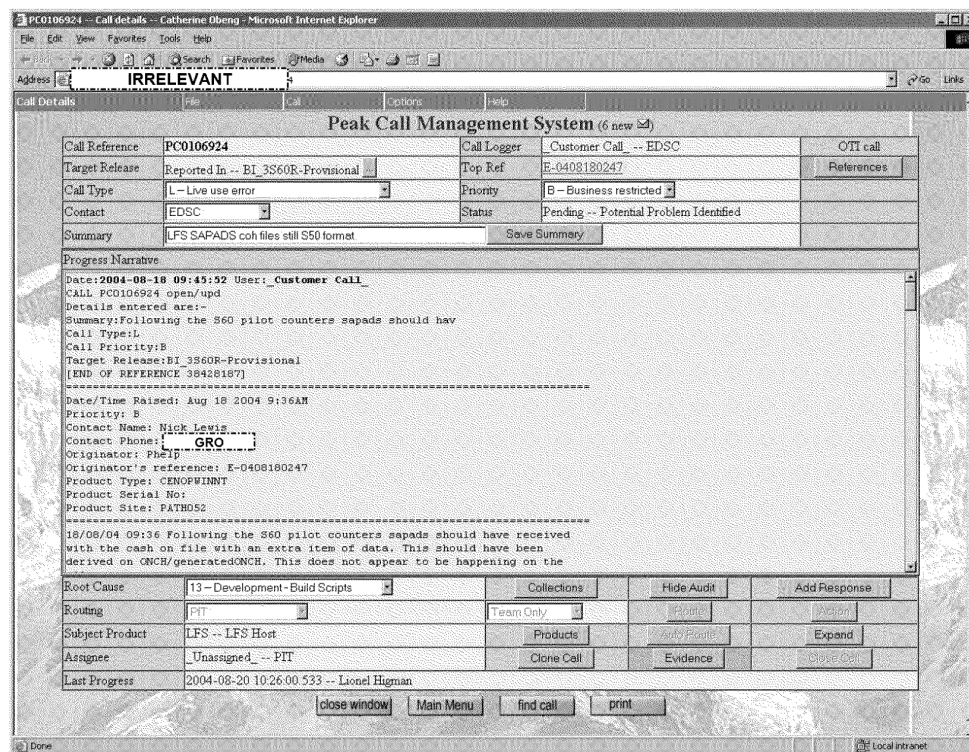


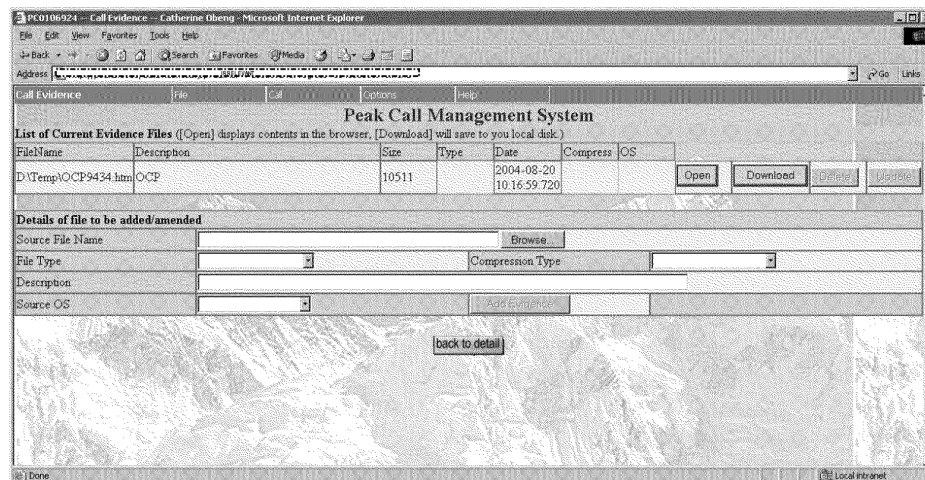
Fig 19 Call with Evidence attached

### 13.1.2 Retrieving Attached Evidence

Copies of attached files can be downloaded. From the Call Details page

- Click **Evidence** button **Call Evidence** page is displayed

*Note: There are two evidence pages, HTML and Java, the main difference is only in the way the Update functionality works, see [Section 13.1.5](#).*



*Fig 20 Call Evidence page (for download)*

- Locate the particular evidence file from the list
- Click **Download** button next to the file, this opens up. This functionality depends on the user's level of privilege.

*Note: Peak will remember the last directory used and so will point to that.*

### 13.1.3 Add New Evidence

To add extra information from a different source, you must be in the Call Details page:

- Click Evidence button, the Call Evidence form appears

**Peak Call Management System**  
Call: PQ0099537 - Call Evidence

List of Current Evidence Files (Evidence contents will be displayed in the browser, right-click and choose 'Save Target as' to Download)

FileName	Description	Size	Type	Date	Compress	OS
----------	-------------	------	------	------	----------	----

Details of file to be added/amended

Source File Name	<input type="text"/>	Browse...	
File Type	Configuration file	Compression Type	None
Description	<input type="text"/>		
Source OS	Secure Solaris (UNIX)	Add Evidence	

Back to Details

Fig 21 Call Evidence form page (blank form)

- Click on Browse button, the standard Microsoft Windows **Choose File** windows is displayed  
Select the appropriate file from the right source
- Click **Open**, the full path of the file is now placed in the Source File Name field box on the Call Evidence page
- Click on **File Type** down arrow to select from the DDL appropriate File Type

For Clarity,

- Type in some summary text describing the type of file or evidence gathered in the Description box
- Choose from the DDL, the appropriate **Source OS** (Operating System)  
If file is other than plain ASCII text, then make sure to select the appropriate **Compression Type**
- Click down arrow next to **Compression Type** to select from DDL, field has default of 'NONE'
- Click on **Add Evidence** to include the chosen file to the call, the new evidence is added to the top of the page.

#### 13.1.4 Removing Attached Evidence

*Note:* From the Call Evidences page

- Click the **Delete** button next to the file you wish to remove from the call.
- Click on **Back to Details** button to exit Call Evidence form page.

### 13.1.5 Update button

Clicking the Update button next to the particular evidence file will cause the evidence details to be copied to the second part of the form 'Details of File to be Added / Amended'. To enable user to make any necessary changes required.

Users running the Java versions of the Peak client will noted that Peak will try to load the Updated version of the Evidence file from their default directly. In the HTML version users must Browse to the Updated file.

*Note: Update and Delete buttons are activated or deactivated depending where the call is i.e. call is currently with your Default team, unless you have Administrator privileges.*

### 13.2 Clone a Call

For the purposes of meeting SLA, if a call is to be fixed at future Release date that is well beyond the **Target Date** of the call, then the call can be duplicated for progression to allow the original call to be closed. Call cloning takes place only at the Peak end of the OTI link.

To clone a call user must be in the Call Details page

- Click Clone, a copy of the master call is taken. The new cloned copy is displayed in the Call Details page.

The screenshot displays the 'Peak Call Management System' interface in a Microsoft Internet Explorer browser window. The address bar shows 'IRRELEVANT'. The main content area is titled 'Call Details' and contains a form with the following fields:

Call Reference	PC0110101	Call Logger	Catherine Obeng -- EDSC
Target Release	Reported in -- EI_3S60	Top Ref	KEL_COBeng1234Q
Call Type	C - Cloned call	Priority	C - Progress restricted
Contact	Catherine Obeng	Status	Open --
Summary	Test Peak	Save Summary	

Below the form is a 'Progress Narrative' section with the following text:

```
Date:2004-08-23 16:10:16 User:Catherine Obeng  
CALL PC0110101 open/upd  
Details entered are:-  
Summary:Test Peak  
Call Type:C  
Call Priority:C  
Target Release:EI_3S60  
[END OF REFERENCE 38056418]  
Date:2004-08-23 16:08:37 User:Catherine Obeng  
CALL PC0110100 open/upd  
Details entered are:-  
Summary:Test Peak  
Call Type:A  
Call Priority:C  
Target Release:EI_3S60  
[END OF REFERENCE 38056407]  
Date:2004-08-23 16:08:37 User:Catherine Obeng  
Testing the new Cloning features in Peak.  
Routing to the appropriate Team.
```

At the bottom of the interface, there is a 'Root Cause' section with a dropdown menu set to 'None' and several buttons: 'Collections', 'Hide Audit', 'Add Response', 'Routing', 'Route', 'Action', 'Subject Product', 'Products', 'Auto Route', 'Expand', 'Assignee', 'Clone Call', 'Evidence', 'Close Call', and 'Last Progress'.

*Fig 22 Newly created Cloned call page*

When the new clone call is generated, some of default values are changed to reflect the fact that this is a copy of a call rather than an original. Some of the values that are changed including the following;

**13.2.1 Call Reference**

A new call reference now appears in the Call Reference field.

**13.2.2 Call Type**

The newly created cloned call will have call type Call Type '**C - - Cloned call**'.

**13.2.3 Contact**

The field is defaulted to the current user who is cloning the call.

**13.2.4 Call Logger**

The user's name and default Team name is displayed in this field.

**13.2.5 References**

Cloned calls will automatically displayed the reference number of the Master call under the references menu.

➤ Click **References** button, the References page is displayed

The listing includes the original call that the cloned call was copied from.

Note: The master call reference now has the focus in the Top Ref button.

**13.2.6 Status**

The current Response Category of the original call is copied, however the key word '**Open**' now appears in front of the Response Category.

**13.2.7 Progress Narrative**

A detail of creation date, time, user and the Summary line is displayed in the top part of the Progress Narrative box.

**13.2.8 Routing**

The cloned call is automatically routed to the call 'Cloner's' default team and username.

### 13.2.9 Assignee

The value in the field is defaulted to the cloned call's originator username and default team concatenated together.

## 13.3 Printing

Several options in Peak on what type of print output you can have. Print per page of what is currently displayed or printing detailed information on a particular call.

### 13.3.1 Printing from Call Display page

- Click Print button
- Standard Microsoft Printer options window is displayed
- Select the appropriate printer
- Click **Print**

**Note:**

### 13.3.2 Print from the Expanded Call Details page

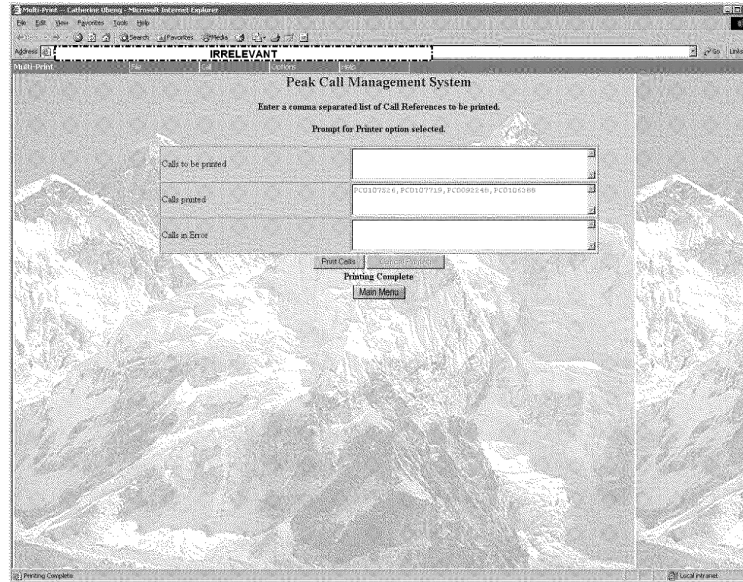
From the Call Details page

- Click Expand button, the Expanded Call Details page is displayed
- Either click on the Print button the page (print job will go straight to your defined default local printer) or
- Select Print from the Explorer File menu, the standard Microsoft Printer options window is displayed
- Select the appropriate printer
- Click Print

### 13.3.3 Multiple Print

More than one call details can be printed using this option. Select the option from the Call Details page

- Click **Multiple Print** button the **Multi-Print form** page is displayed;
- Enter a comma delimited list of call reference number to be printed
- Click on **Print calls** button to start printing.



*Fig 23 Multi-Print form page*

### 13.3.4 Print from Call List page

To print from the Call List page,

- Click Print button, this will print the grid in a table.

To print several individual calls, select the list of calls and choose multi-print.

## 14.0 External Interfaces

- SSC KEL Database
- PowerHelp Database

### 14.1 KEL

KELs resources can be accessed directly from the Peak Main page.

- Click **KEL**, the SSC KEL Search form is displayed (this is only true if you are currently connected to the UK domain or SSC domain else see 14.1.1);



**SSC KEL database Search Form**

List High Visibility KELs

If this is the first time you have used this system, please take time to read the [instructions](#) before you start to use it.

Query:

Query is literal text       Is Query Language  
 Word beginning with       Return the titles only

Release:       Product:

The following properties can be added to the Query above:

*Fig 24 SSC KEL Query Search Form*

- Enter into are available for Query
- Click **Execute Query** to begin search on the SSC Database

### 14.1.1 None UK and SSC domain users

On clicking the KEL button, users who are not currently connected to the UK or SSC domains will be presented with the NT domain login window below;



Fig 25 Logon screen for accessing KEL database

**Note:** If you do not already have a UK or SSC domain account, then contact Lionel Higman  
Tel: **GRO** or [lionel.higman@GRO](mailto:lionel.higman@GRO)

### 14.2 PowerHelp

Select option from **Peak Main** menu page, a standard Windows Network Login appears.

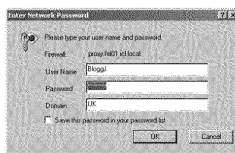
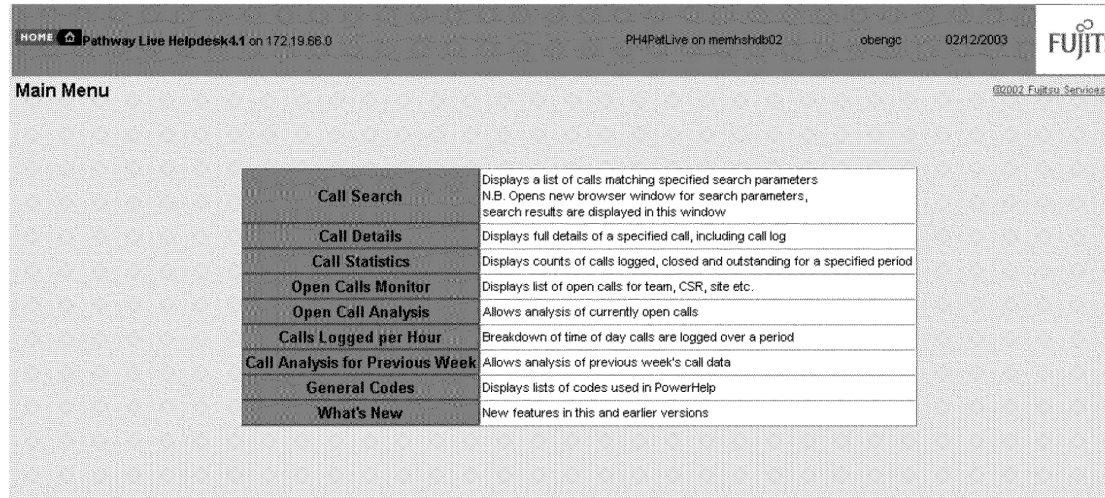


Fig 26 Logon on screen for accessing PowerHelp database

- Input your Co-operate Domain account details (what you use to login into Outlook mail)
  
- Click **OK**, the **PowerHelp Main Menu** page is displayed



*Fig 27 PowerHelp Main Menu page*

### 14.3 Preferences and Change of Password

- User Preferences
- Customising Call List Grid
- Password Change

## 15.0 User Preferences

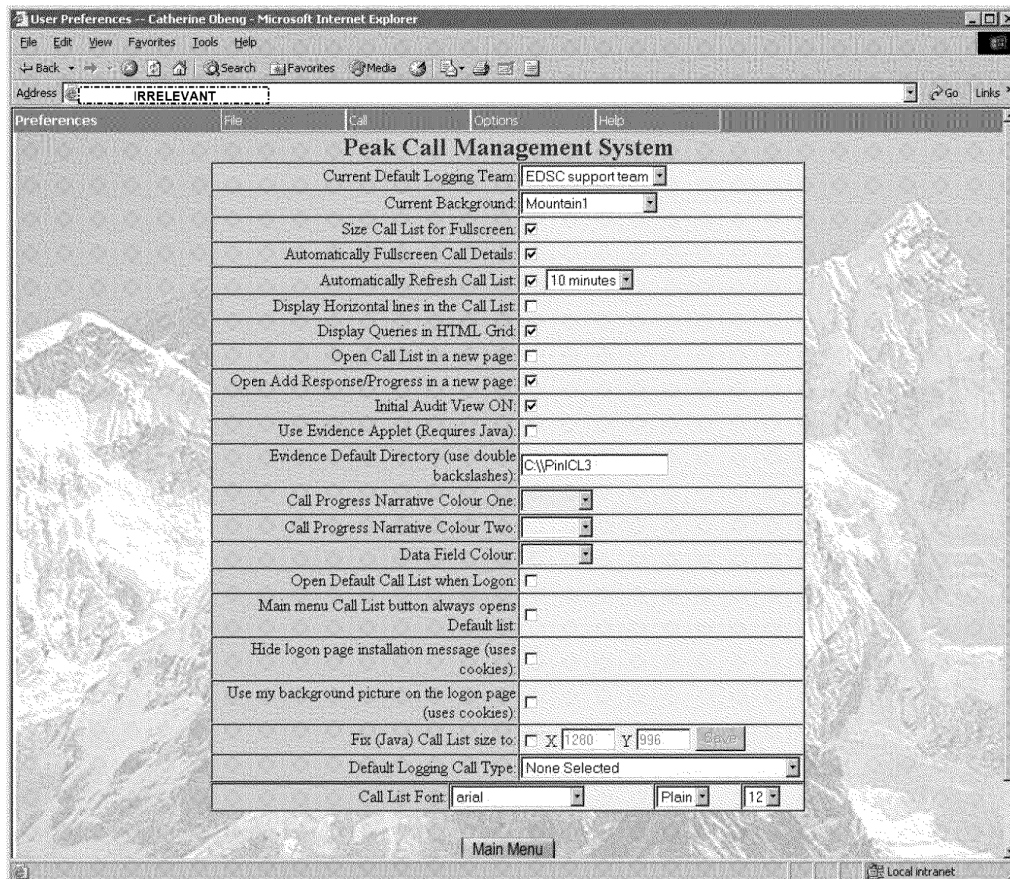


Fig 28 User Preferences page

### 15.1 User Preferences page

These options relate specifically to individual user in terms of how you wish to view your call list grid, which team is used as the default when logging new calls and whether the call list grid is displayed in HTML or Java.

From **Peak Main** page,

- Select **Preferences**, the **User Preferences** page is displayed with default values,
- Make necessary changes or
- Click in the appropriate DDL and make a choice

Or from the Main Menu page

- Point mouse on Options, choose Preferences

#### 15.1.1 Default Logging Team

The Administrator sets up the value, which appears in this box. Some users may belong to more than one team and therefore this option is to allow them to choose another team in the DDL as the default.

- Click Preferences button, the User Preferences page is displayed
- Click in the Default Logging Team field to change the currently displayed value (you might not have any other options available if you belong to only one team)

*Note:* From New Call page you can also change the default team

#### 15.1.2 Current Background DDL

The background picture in that appears as the wallpaper when you log into Peak client.

- Click the down arrow to select from the DDL of Teams, which you might belong.

#### 15.1.3 Size Call List to Fullscreen Tick box

There are two modes to display the [Call List](#) page, **Full** page which displays wider and bigger view of the page and Standard (default), half of the web browser and.

- Click to check the box next to the field to activate the Full page
- Click in the box again to uncheck to reset the page size to the default, Standard.

To size Internet Explorer (IE) to full-page mode, select View menu -> full screen or F11.

#### 15.1.4 Automatically Fullscreen Call Details Tick box

- Check box to display the Call Details page to full screen size when opening the details of a call.

#### 15.1.5 Automatically Refresh Call List each 10 minutes Tick and Combo boxes

Every time Peak is updated (currently set to 10 intervals) the changes will be reflected automatically in your Call List page with.

Use the dropdown to Select Refresh time period.

Note: if this option is not ticked, you can use the [Refresh](#) button in Call List page to refresh as and when you choose to.

### 15.1.6 Display Horizontal lines in the Call List Tick box

This option allows users to have horizontal lines are drawn between each call in the Call List grid page.

### 15.1.7 Display Queries in HTML grid Tick box

Two choices to view the Call List page either use the Java grid or HTML pages. There is greater flexibility to using the Java pages since you can resize the columns, drag and drop columns and narrow columns. Also you can load as many as 15000 rows in the Java grid without losing speed. Limitation with the HTML page is that any more than 100 rows will cause the query to slow down.

Tick box to load Call List page in HTML.

Main differences between the Java and the HTML Interface are as follows;

#### Call List grid

Once the box is ticked in the Preference page,

- Click Main Menu to return to Home page
- Click Call List, the Default Query will run to display the calls in the HTML interface, see figure below:

#### Open a Call

A single click on a call in the list will open the Call Details page.

#### Select Multiple Calls

In the HTML Call List grid;

- Click in the empty boxes in the first column against the calls you wish to select and
- Click on Subset button on top of the page

### 15.1.8 Open Call List in a new page Tick box

When the user opens a Call List page from the drop-down menu or Main Menu page it will be opened in a separate window preserving the page the user is on.

### 15.1.9 Open Add Response/Progress in a new page

Will leave the Call Details page open and display the Add Progress page in a new window.

**15.1.10 Initial Audit View ON Tick box**

The 'Show/Hide Audit' test on the Call Details page initial settings.

**15.1.11 Use Evidence Applet (requires Java) Tick box**

Uses the evidence applet rather than the HTML evidence page, see [Section 13.0](#).

**15.1.12 Evidence Default Directory (use double backslashes) Text box**

The directory used by the evidence applet by default.

**15.1.13 Call Progress Narrative Colour One Combo box**

Background colour used to highlight a single progress updates to a call.

**15.1.14 Call Progress Narrative Colour Two Combo box**

Background colour to highlight alternating progress updates to a call.

**15.1.15 Data Field Colour Combo box**

The colour used to highlight data items on pages.

**15.1.16 Open Default Call List when Logon Tick box**

Displays the Default Query in a Call List page when the user first log on.

**15.1.17 Main menu Call List button always opens Default list Tick box**

The Main Menu Call List button will always open the default query rather than the one last loaded.

**15.1.18 Hide logon page installation message (uses cookies) Tick box**

Hide the link to the logon instructions on the logon page.

**15.1.19 Use my background picture on the logon page (uses cookies) Tick box**

Show the users selected background picture on the logon page.

**15.1.20 Fix (Java) Call List size to Tick box and Text boxes**

Customise the Java Call List to a specific size rather than the default full screen.

**15.1.21 Default Logging Call Type**

A default logging type when raising new calls.

**15.1.22 Call List Font**

The font used by the Java Call List.

**15.1.8 Main Menu**

- Click button to return to **Peak Main** page.

*Note: Changes made using Preferences will not affect existing windows, to effect the changes; you must go back and navigate from Peak Main menu.*

## 15.2 Customising Call List Grid

User has the option to configure their Peak Client interface to their choice. From Peak Main page,

- Click Preferences, the [User Preferences](#) page is displayed

Manipulating the Column headings information in the Call List page, see fig 4.

### 15.2.1 Changing Column Width

If the information in a column is not fully visible due the column being too narrow, you can increase the size of the column by

- Pointing at the dividing lines on the (right hand side) of the column, mouse changes to horizontal arrow ↔
- Press down arrow or click on the left mouse and drag to the new preferred point and release the mouse.

### 15.2.2 Moving the Columns

You can change the position of a column to another position by

### 15.2.3 Pointing at a column heading

Dragging the column across to the desired position.

### 15.2.4 Resizing the Window

You can resize the window using standard Windows techniques with the mouse.

### 15.2.5 Save Layout button

You can make permanent changes to the layout by performing any of the above actions and then clicking on the **Save Layout** button.

*Note: Layout setting relates to the current Query only! No functionality exists for reinstating previous page layout from the Call List grid. User must make the required changes and click Save Layout button again.*

When building a query if you edit an existing call, the layout will be copied to the new query.

### 15.2.6 Display button

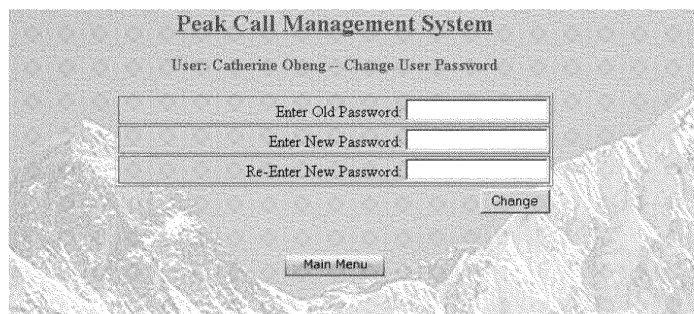
Select a particular call entry and double click or click on the Display button to display the **Call Details** page.

## 15.3 Changing Password

Users have the option to change their own password where they feel their existing one has been compromised. Select **New Password** from Peak Main menu page, the **Change User Password** page is displayed.

### 15.3.1 Change User Password form page

The Change User Password form has three input fields.



The screenshot shows a web form titled "Peak Call Management System" with the subtitle "User: Catherine Obeng - Change User Password". The form contains three input fields: "Enter Old Password:", "Enter New Password:", and "Re-Enter New Password:". Below these fields is a "Change" button. At the bottom of the form is a "Main Menu" button. The background of the page is a grayscale image of a mountain range.

*Fig 29 Change User Password form page*

### 15.3.2 Old password

Before you can choose a new password, you must know what your current password is. Input the current password that you now wish to change in this field.

### 15.3.3 New Password

Input a new value to change the password.

### 15.3.4 Re-enter New Password

The new password must be entered twice to allow verification. Type the same input in section 5.3.2.

### 15.3.5 Change button

Press on this button to validate and confirm the change.

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