Service Desk User Guide

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Product Description

Fleet-Net has developed Service Desk to track complaints and compliments along with other user-defined categories that can be utilized through Customer Service. Standard reports include Service Desk Exceptions Report, Summary Report along with various Miscellaneous Reports. Distribution capabilities include Intranet and Internet utilizing installed email.

The Service Desk module is intended to be used to record, store, and track complaints, compliments, and commendations. The module allows entry of complaint; compliment or commendation data at the time the information is received. Completed complaint reports are forwarded to designated department(s) for response. Exception reports are generated for complaints that have not been forwarded to the department, or complaints that are not completed or verified.

Service Desk has security features that allow for confidentiality and accountability to be in place. These features will allow Management to maintain a record of complaints and compliments that are reported from customers.

If you still cannot find an answer to your question(s) please call our Support Hotline at (800) 258-2762.

Service Desk Implementation

It is understood that the Systems Administration Guide had been followed completely and that all other modules are working prior to the Service Desk installation.

All modules must first be installed as directed in the System Administration Guide.

About This Guide

This guide contains standard cycles and checklists for operation and a description of each feature released with the module. The module description provides the intended application or use of the module and any comments that relate to this specific module.

The standard cycles are to be used when operating the software to ensure that all necessary steps are being taken in the correct order, i.e., Daily Service Cycle and the Monthly Service Cycle.

To correctly exit a form click on the Fleet-Net® Icon always located in the upper right of every form.

Throughout Fleet-Net® modules, there are Green Checkmarks that will appear next to specific fields. These Green Checkmarks when selected will open the Misc. List Codes form allowing the user to setup the necessary codes and their value for the associated field.

When the binoculars search function is not available, nor a drop down list, select 'Ctrl F' as a search tool. When using the button to search the sample search form to the right will display. Use anyone of the search criteria options to find the item. Once selected it will populate at the bottom of the form. To populate the previous form with the selected item simply hover over the item # and double click it. Close the search form.
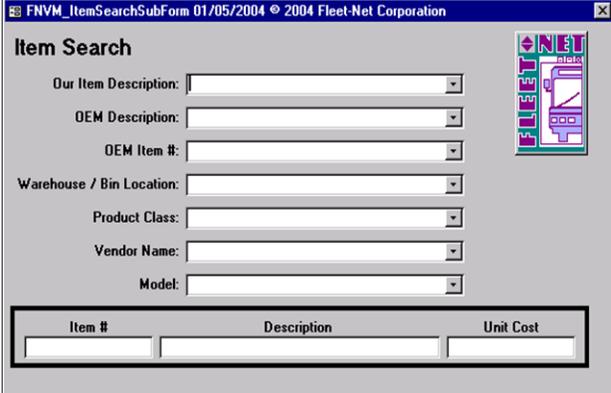
The clock button allows for changing the time entry.

The calendar button allows for quick selection of a specific date via a calendar.

The calculator button allows for quick simple calculations on the fly. It opens up your systems calculator.

Service Desk

	Sample Transit	
	Service Desk	

1	Create Reports	?
2	Departmental Response	?
3	Manage Open Reports	?
4	Manage Closed Reports	?
5	Service Desk Setup	?
6	Service Desk Reports/Inquiries	?
7	Generate Response Letter	?
8	Edit Report (Mgmt Only)	?
9	Edit Report and Responses (Mgmt Only)	?
10	Edit Report/Responses and Action Taken (Mgmt Only)	?
16	Return To Previous Menu	?

◀ **Enter your selection:** ☐ **Show Details**

Vsn: 09.06 [2/6/2018]   dfigenbaum FNLV44   SD   **Find**

Service Desk Setup

On the Service Desk Menu, select Service Desk Setup. The initial set-up procedures (Reports Codes, Email Addresses, and Priority Numbers, etc.) must set up before using Service Desk.

Report Codes

Report Codes are used to identify the type of reports being created by the Customer Service Representative's. Report codes allow for the assignment of the personnel who will be notified by email when reports are created. Other information that should be asked of the person making the report can be added in the Other Information fields.

Field Name	Max Field Size	Field Type	Description
Report Code	5	Alpha/Numeric	Select an existing report code from the drop down list. See below for adding a new report code.
Description	30	Alpha/Numeric	Automatically populates based on the report code selected.
Priority	1	Alpha/Numeric	Automatically populates based on the report code selected.
Email Addresses	50	Alpha/Numeric	Automatically populates based on the report code selected. Additional email addresses can be entered by entering the recipient's email address in the first blank row. To delete a recipient from the list, highlight the row and press delete on the keyboard.
Other Information - Sort		Number	Automatically populates based on the report code selected. Enter a number representing the order in which the list will be displayed.
Other Information – Sort	100	Alpha/Numeric	Automatically populates based on the report code selected. Additional items can be added by entering additional lines that will be included with the selected report code. When this report code is assigned to a report, each of the items defined in these fields will display. The user taking the report will fill these in on the report.

To add a new report code, type in the new report code (Maximum five alphanumeric characters); enter.
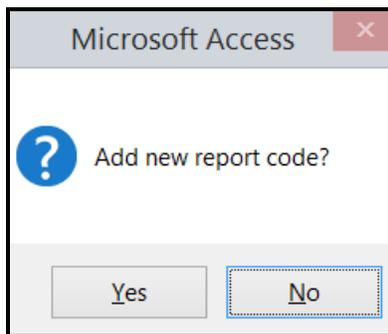
You will see the following screen.

Modify / Add Report Codes

Report Code: 1234 ▼   Delete

Description: No Show   Priority: 1

Please list Email addresses reports with this report code should go to:

pdodd@availtec.com	
▶	

Please list other fields of information for this report code:

Sort: Data Field Description:

Field Name	Max Field Size	Field Type	Description
Report Code	5	Alpha/Numeric	The new report code automatically displays.
Description	30	Alpha/Numeric	Enter a description for the new report code.
Priority	1	Alpha/Numeric	Enter a priority for the new report code. These were set up in Service Desk Setup #2.
Email Addresses	50	Alpha/Numeric	Enter all email addresses for individuals who will be notified each time this report code is assigned to a report.
Other Information - Sort		Number	See Below. This data is populated in SD01 #9.
Other Information – Data Field Description	100	Alpha/Numeric	See Below. This data is populated in SD01 #9.

Once you have created your new report code, or, if you would like to add additional questions to an existing Report Code, go to the setup menu (SD01), and choose Option #9.

Field Name	Description
Rpt Code	Enter the Report Code Number.
Sort	These will indicate what order the questions display on the form
Other Fields	Enter the questions that you want the user to ask the customer when this report code has been chosen.

To delete a report code, click **Delete**
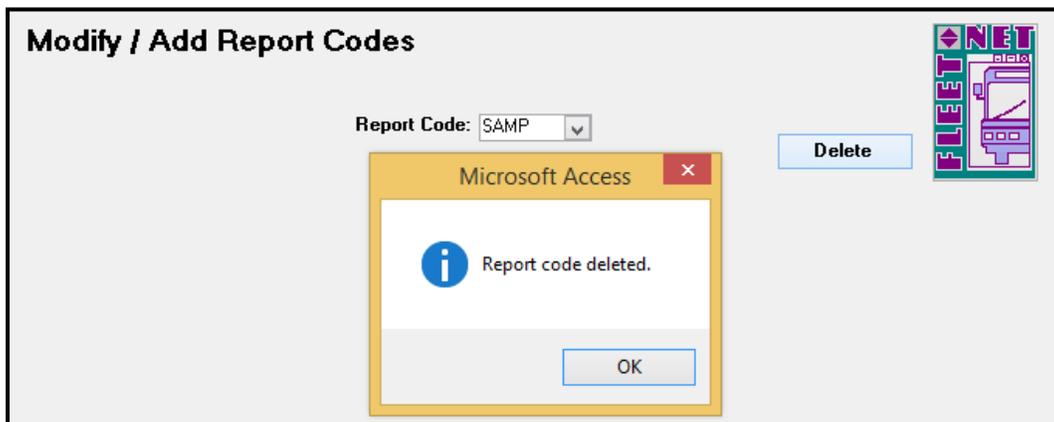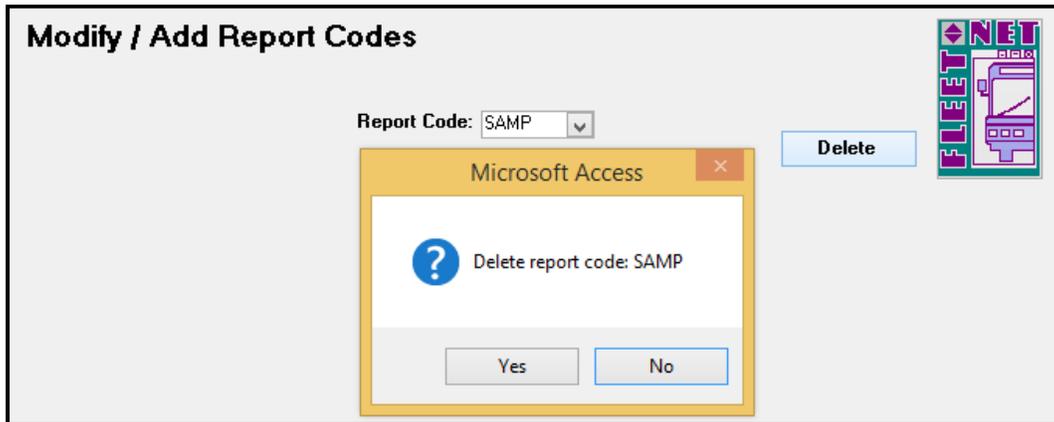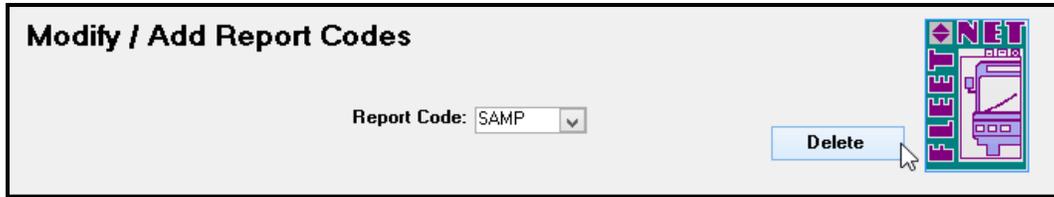
It is not recommended to delete report codes that have been assigned to other reports.

Priority Time Limits

The Priority Time Limit is used to establish the time allowed a report to be outstanding.

Field Name	Max Field Size	Field Type	Description
Priority	1	Alpha/Numeric	Enter a number value of 1 through 5 where 1 represents the highest priority
Limit		Number	Enter the maximum number of response time hours based on the priority assigned. In the sample above a response to a priority 1 report must be done within 24 hours.

Control Record Setup

The Control Record Setup will include two record types and the values associated. The two required records are CplNo (Complainant Number) and ReportNo. In the example below, the next report number that the system will generate will be 245.

Field Name	Max Field Size	Field Type	Description
Record Type	30	Alpha/Numeric	Enter records exactly as shown above
Value	12	Alpha/Numeric	The program will assign sequential numbers to complainants and reports. Enter a number that is one digit less than the first number to be assigned to the complainant and report.
Maximum Value	12	Alpha/Numeric	Enter the maximum value for complainant and report numbers. (See Maximum # of Digits)
Maximum # of Digits	12	Alpha/Numeric	Enter the maximum number of digits for the complainant and report numbers. In the sample above, 5 was entered for complainant and 99999 was entered for maximum value. When the sequential numbering reaches that number, the system will restart the numbering.
Add Leading Zeros		Yes/No	Check this box to add leading zeros to the numbers. Fleet-Net recommends using this feature in order to sort the numbers correctly. In the sample above, with leading zeros checked, the next complainant number would be 00008.

Service Desk Miscellaneous Codes

Click *Miscellaneous Codes* to define all codes used throughout the Service Desk module.

Each Fleet-Net application includes a list of miscellaneous codes that are used within the system. Some of these codes are preset by Fleet-Net (Specific) while others are user defined.
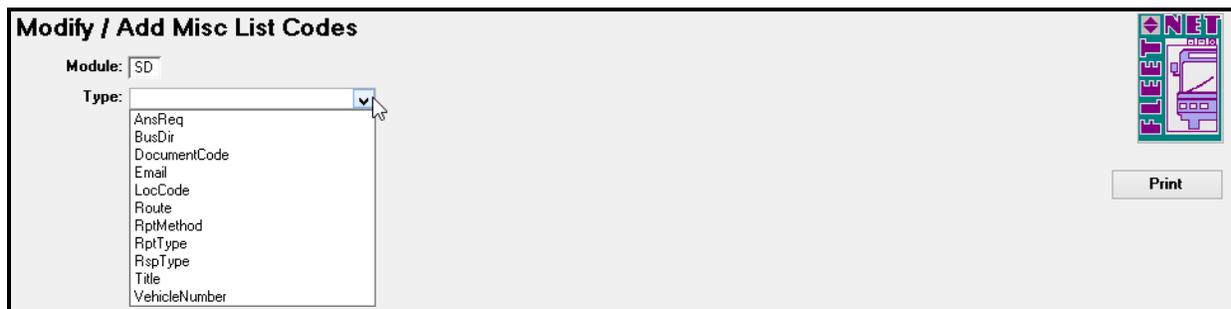
Field	Description
Type	Select from the drop down options.
Code	Code used to identify the type of code
Value	Definition of code

The *Print* button will print a listing of all Miscellaneous Codes. The report will display the **TYPE**, **CODE,** and **VALUE**.

AnsReq (User Defined)

BusDir (User Defined)

DocumentCode (User Defined)

Email (User Defined)

Modify / Add Misc List Codes

Module: SD
Type: Email

Code	Value
PrintComplainant	No
ReportType	pdf

LocCode   (User Defined)

Modify / Add Misc List Codes

Module: SD
Type: LocCode

Code	Value
AR	Along route
AS	At Stop
None	None
TR	In Traffic

Route (User Defined)   .

Modify / Add Misc List Codes

Module: SD
Type: Route

Code	Value
1 N	1 Yellow North - Weekday
1 S	1 Yellow South - Weekday
10 E	10 East Gold - Weekday
10 W	10 West Gold - Weekday
100	100

RptMethod (User Defined)

Modify / Add Misc List Codes

Module: SD
Type: RptMethod

Code	Value
B	Facebook
E	Email
F	Formspring
I	In Person
P	Phoned
S	MTD Supervisor Complaint
T	Twitter
W	Written

RptType (User Defined)

Modify / Add Misc List Codes

Module: SD
Type: RptType

Code	Value
1	Complaint
2	Compliment
3	Suggestion
4	Service Request
5	Technology Issue
6	ADA Service Complaint
F	found
I	Illinois Terminal
L	lost
T	Test

Print

RspType (User Defined)

Modify / Add Misc List Codes

Module: SD
Type: RspType

Code	Value
E	Email
N	None
V	Verbal
W	Written

Print

Title (User Defined)

Modify / Add Misc List Codes

Module: SD
Type: Title

Code	Value
Dr.	Doctor
Miss	Miss
Mr.	Mister
Mrs.	Misses
Ms.	Ms.

Print

VehicleNumber (User Defined)

Modify / Add Misc List Codes

Module: SD
Type: VehicleNumber

Code	Value
0101	M122091
0102	M122097
0103	M131551
0104	M122098
0105	M122099
0106	M122100

Print

Modify Email

This form allows an email address to be deleted or modified.
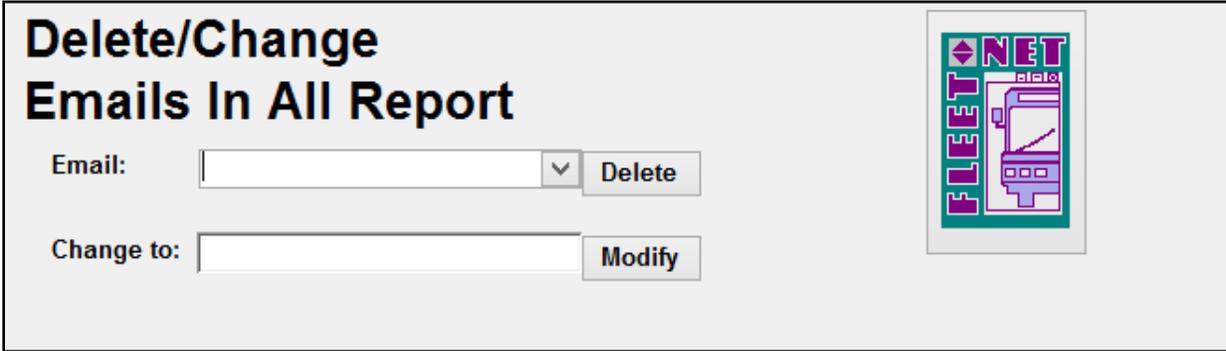
Allows email addresses to be deleted or changed globally for all report codes. This will **only** affect future reports. Existing report information will contain the previous email recipient.

Delete

Select the email address and click **Delete.** The email address will be deleted from all the report codes to which it was assigned. It is **not** deleted from existing reports.

Modify

Enter the new email address and click **Modify**. The email address will be changed for all report codes assigned. Previous reports will **not** be modified.

User Defined Data Form Setup

Select this form to set up user defined Service Desk data fields for custom tracking and reporting.

DATA FIELDS

FORM RESTRICTIONS

FIELD RESTRICTIONS

RENAME FIELD

User Defined Data Entry

User Defined Data Security Setup

Create Reports

The Service Desk Report form captures information from complainants in reference to Complaints, Compliments and Suggestions associated with the transit operations. It provides the ability to render a quality customer service contact point and at the same time provide management with a means of control and over-sight on the follow-through and completion of incidents related to the service provided by the transit.

Enter the name of the complainant. If the person is already in the database, their name will be in the dropdown. If this is the first time a person is making a report, enter their information into the form and they will be added to the database.

CREATE REPORTS

Click **Create Reports**

Field Name	Description
Edit Reported By Information	Click this button to edit the customer's information. Make the necessary changes, and then reselect the customer.
Cancel Entry	Click to exit the form without generating a report number.
Generate Report #	After confirming that the customer's information is correct, click the Generate Report # button The next report number is generated, complete with the customer information.

If the customer exists in the database, select the Last Name and First Name from the drop down lists. Then click **Select Reported By** and confirm their address.

If there are multiple complainants with the same first and last name, choose the correct address.

When the complainant is not in database, complete this form and click **Generate Report.**

Complaint Taken By information is populated with the customer service representative's employee number, name, report creation date, and time.

Edited Complaint allows the customer service representative to modify the information.

Complete the remaining fields with the information supplied by the complainant.

Field Name	Description
Reportable	Check this box to indicate that it meets the reporting requirements. For Example NTD
Comment	Enter the complainant's description of the event.
Inc Date	Enter the date of the incident or select via the calendar.
Inc Time	Enter the Time of the incident. Enter A for AM, P for PM
Inc Loc	Enter the location code.
Route Desc or Route #	Enter or select the route description or route # as defined via Misc Codes in the setup. The route # field will be populated and the description displayed.
Bus #	Enter the bus # as defined via Misc Codes in the setup.
Bus Direction	Enter the direction
Report Method	Enter the method used by the complainant.
Report Type	Enter the type of report. Ex Complaint, Compliment, Lost & Found.
Location	Allows more descriptive location then location
Emp Description	Enter the employee's description provided by the complainant.
Resp Requested	Enter the type of response the complainant requests.

The green check mark allows the user to enter new data for selection from the drop down list.

REPORT CODES

Report codes ensure the incident Report will be routed by e-mail to the person(s) who will respond to this code.

Select a report code or multiple codes that apply to the report. The email addresses assigned to those codes will display.

For each code, the fields of additional information needed will appear below when the red x is clicked once. The CSR taking the report will fill in the information as provided by the person who is reporting the incident.

To delete an assigned report code – click the button twice.

Other Fields

Selecting Notes provides space for additional information and allows for the attachment of scanned documents or pictures, etc. as deemed necessary.

Field Name	Description
Document Code	Choose a code from the dropdown or add a new code via the green check mark. ✔
Reference	Enter a user defined reference number here. i.e. Seq# or Date. REQUIRED
Comments	Enter comments here. There will be a User, Date, and Time stamp.
Hyperlink	A hyperlink will point to another location on the network or a website.
Attachments	A document or scanned pictures may be attached.

Attachments

Within the Attachments box above, right click and select Insert Object from the drop down menu that appears.
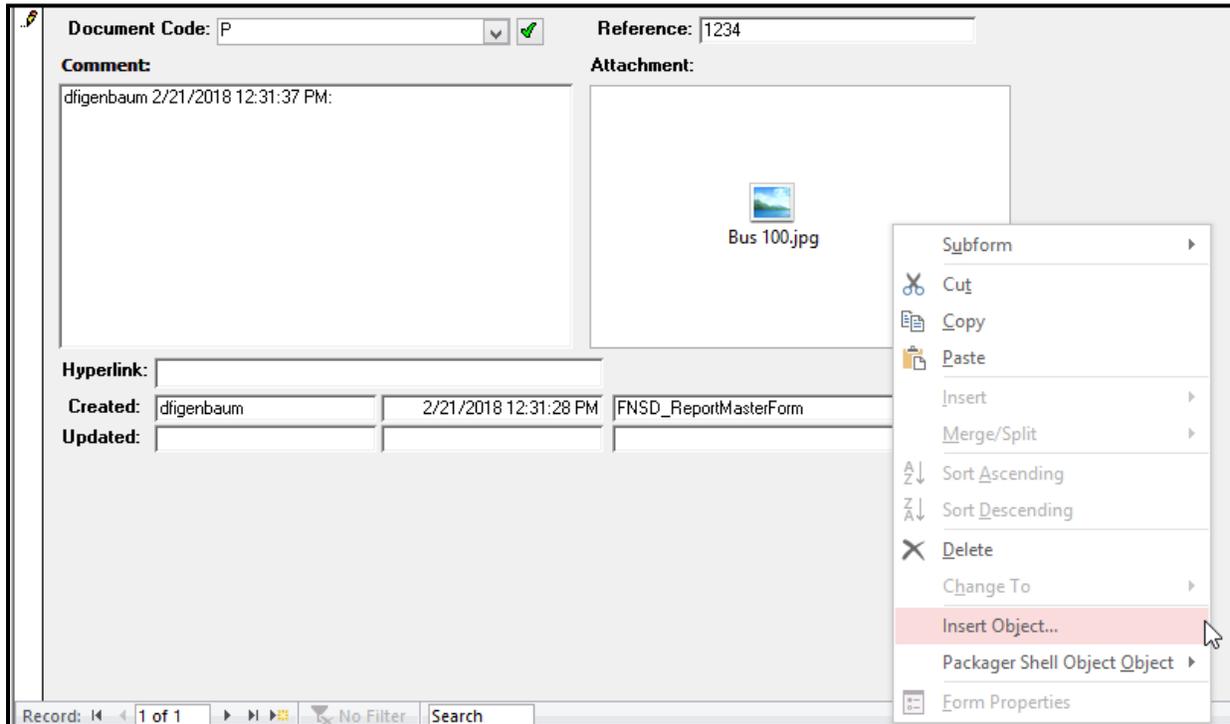
The insert objects window displays.
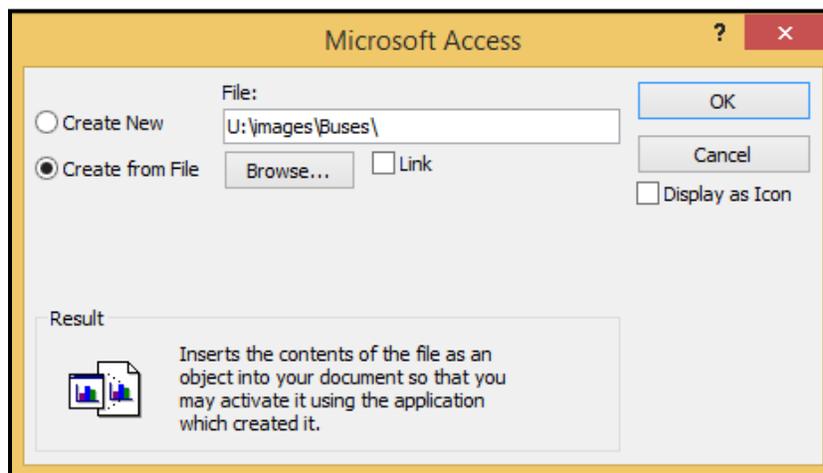
To attach an existing document, select the **Create from File button**. Browse to select the document on the network. Select Display as icon. Click **OK** to insert the attachment.

Send Notification

If the form is closed before sending notification, the following message is displayed.
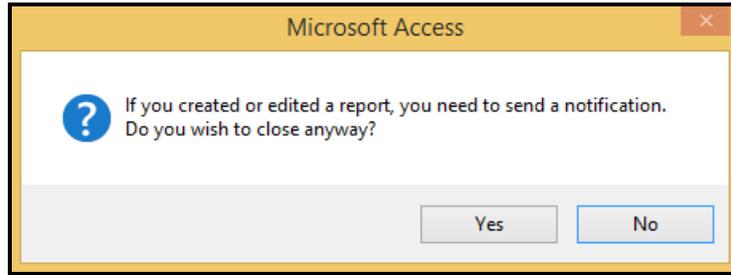
Click Send Notification to generate the email, which will be sent to all respondents assigned to the report codes. The report is an attachment. The email opens up and notes or additional emails can be added.
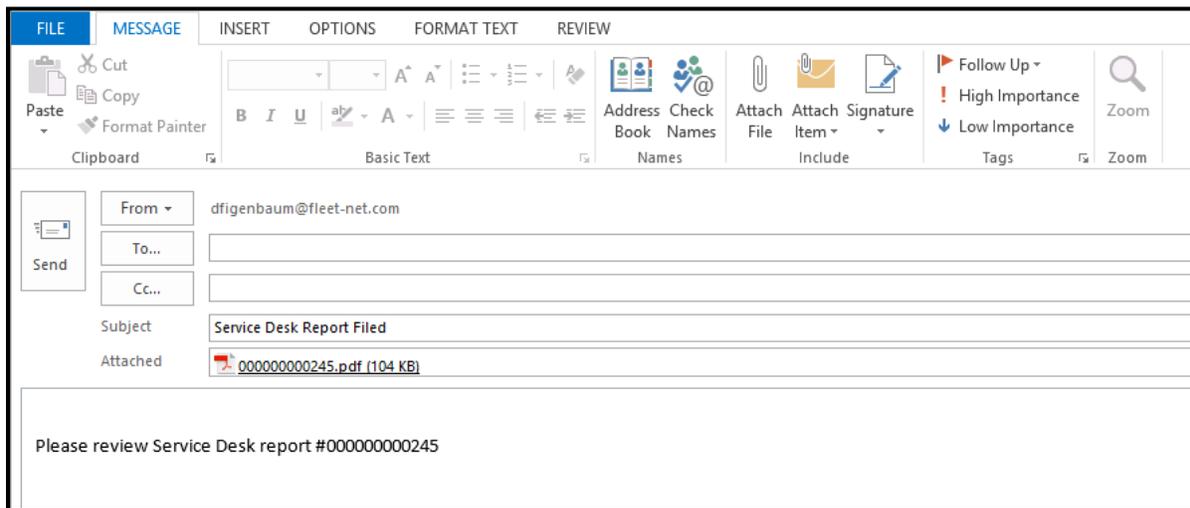
If the email is not sent, the following message displays.
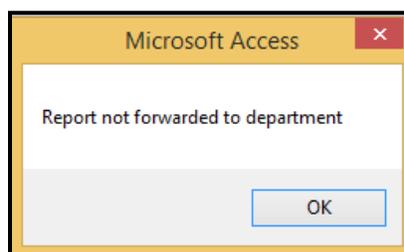
When a report is modified, notification should be sent again.
The email will indicate that the report has been modified with the fields that were changed.
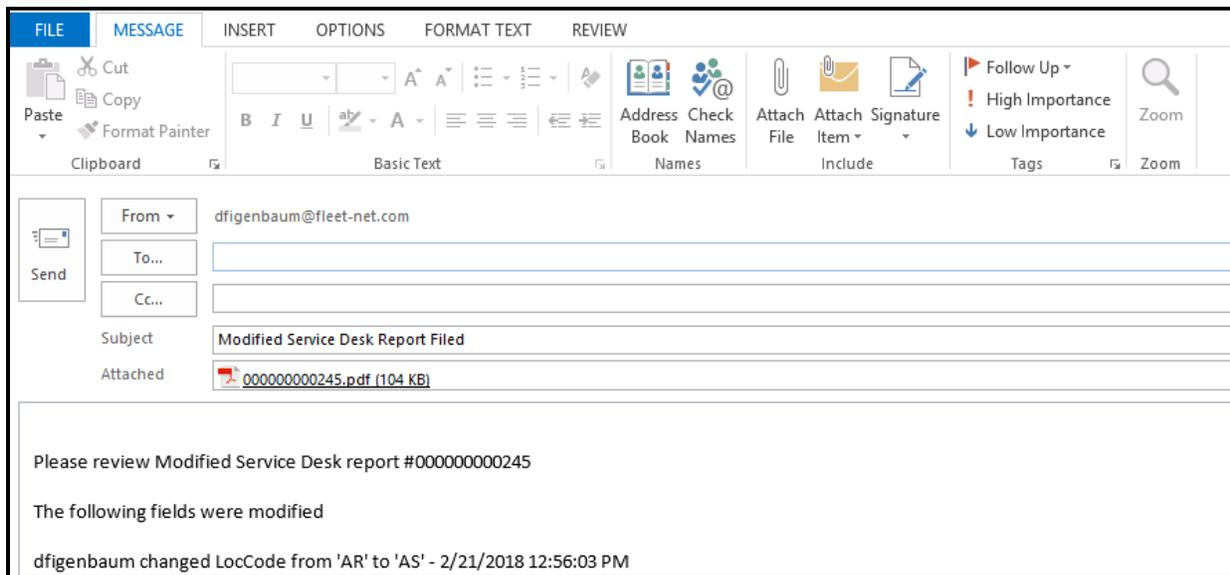
Departmental Response

Select Email from the drop down list. The following form will display for selection. If the box is checked to the right, user will only see reports addressed to them that have not had any responses recorded.

Select Email from the drop down list. The following form will display for selection. If the box is checked to the right, user will only see reports addressed to them that have not had any responses recorded.

Once the report is selected, the following screen displays.

When the **Review Report button** is selected, the original report is displayed.
Report Codes and Notes may be viewed. No editing of the information is allowed on this form.

The addressee enters their response in the Department Response field. When they enter notes in the response box, the Responder, Date Responded, and Check box on the bottom line are populated.
Additional responses may be added until the report is closed.
The report is now ready to be finalized by personnel with access to manage open reports.

Manage Open Reports

Once a report has been created, it will remain in Manage Open Reports until it has been resolved and closed. Use the drop down arrow under the Reports field, to select a report to be finalized.

Report #	Report Date	Report Time	Status	Priority	Reportable	Hours Open	Response	Comments
4135	1/25/2016	12:11:28 PM	Overdue	3	Yes	9,795	Yes	Care Ride driver dropped client off at the wrong location and didn't assit her
4154	1/27/2016	2:42:01 PM	Overdue	3	No	9,745	No	Ann Mc Intosh is still waiting for her 1pm trip as of 2:15pm. Yellow Cab still could not provide an eta as to when she will be picked up. She requested a van for all trips as she can not get into a car. Both trips on Monday 1/25 were also late and a cab was
4169	1/29/2016	10:15:00 AM	Overdue	3	No	9,701	No	Theresa Leggett has been picked up late for most of her trips during the past month. Today she had a 9:30am trip scheduled and as of 10:00am Yellow Cab did not have a driver available to pick her up. She is upset that DART is not reliable to get her to
4299	2/11/2016	4:56:57 PM	Overdue	3	Yes	9,383	No	Wants supervisor to call her reference this bus passing her and pointing back toward another bus that came but had 2 bikes so she couldn't catch it. I explained that buses were too close together so supervisor tries to get them back on track. Caller
4349	2/17/2016	3:16:19 PM	Current	0	No	9,240	No	On January 22nd @ 4:00 in the afternoon, her sister was picked up by a DART cab driver the sister paid 20.00 to the cab driver and the driver kept the change, her sister is mentally challenged. She called the cab company and was informed that she would
4401	2/21/2016	11:56:22 AM	Overdue	3	Yes	9,148	No	Caller stated that Care Ride was a no show .This was for passenger Ruth Buckins .
4524	3/4/2016	11:18:22 AM	Overdue	3	No	8,860	No	Helene Morris had Yellow Cab 2 trips that were extremely late this week. She could not wait any longer for a cab to show up so she had to get a private pay trip which cost $13. She is request reimbursement for this trip and for reliable timely service in the
4525	3/4/2016	11:29:10 AM	Overdue	3	No	8,860	No	George Hopkins is having an issue being picked up by Yellow Cab for his 5:30am

Record: ◀ ◀ 1 of 1523 ▶ ▶I ▶※ 🐾 No Filter Search

This screen may be sorted by any of the headers. A date column can be sorted by oldest to newest, etc. A number column can be sorted largest to smallest. For example, right click in the Response column and the following displays. Choose Sort Z to A and all the reports that have a response will be at the top.

Double click on a report number to open up the next screen.

Note that the Finalize button to the right is greyed out, that is because there were no responses.

Under **List of Responses Requested**, there appears a list of all addressees who received this report. The check flag in the Responded column indicates that a response to this report has been made. Only one response is needed to complete this report.

Click **Finalize,** the following form displays. A report cannot be finalized until at least one email recipient has responded.

This form displays the customer comments and allows all the responses made to this report to be displayed. In the field **Action Taken or Resolution**, enter the result.

Enter **Date Completed**, **Time Completed** and a checkmark for the appropriate conclusion.

Click to **save changes**.

This button is activated only after the Save Changes button above has been clicked. Once user has clicked **OK** to the Saved message.

Click on the **Attach button** to choose either to create a new document or to create a document from a file
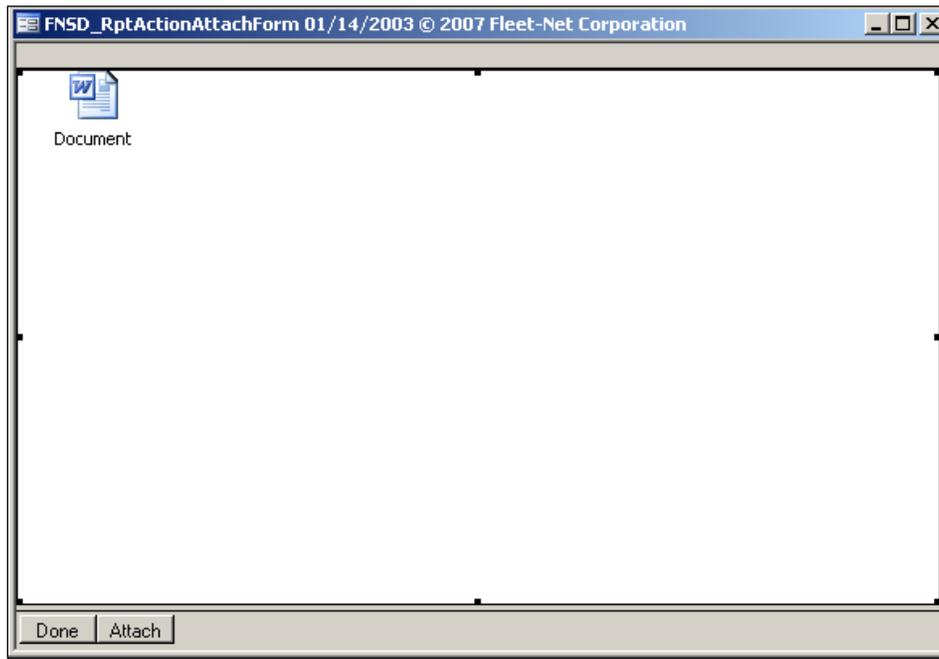
Click on the **Attach button** to choose either to create a new document or to create a document from a file
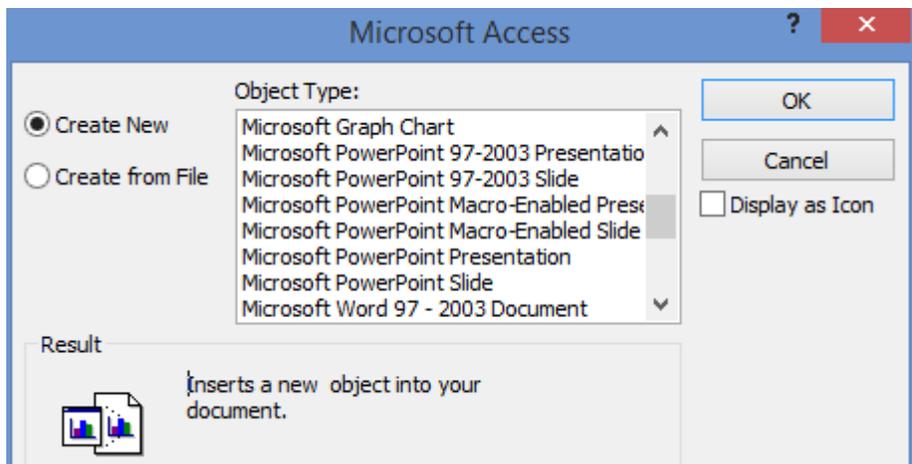
Attaching a existing document or picture

Click create new or create from file. Clicking create file will allow you to browse and select from your folder a document or picture.
Note: You can display your selection as an Icon. This will allow you to edit more easily and it will Allow adding additional information or additional pictures at one time.

Upon completing your attachment, click on the done button to return to the Manage Open Reports Screen.

| View Attachment | This button is now activated. Enter **Date Completed** and **Time Completed.** Select from the conclusion field that this is a *Valid, Invalid* or *Inconclusive* report. |

| Save Changes | Click to save the new changes and the newly added attachment. The form can now be close. |

Manage Closed Reports

Manage Closed Reports

List Reports
Purge

LIST REPORTS

Click **List Reports**
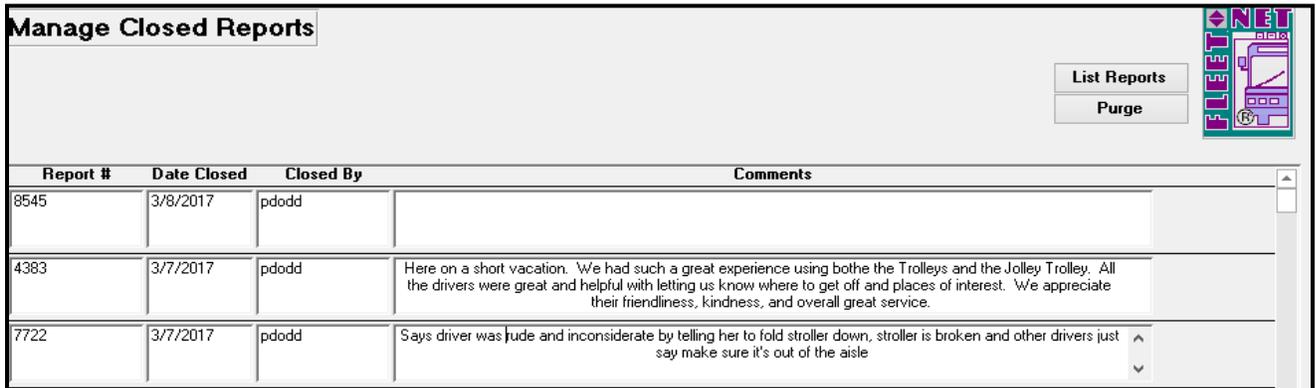
Manage Closed Reports

List Reports
Purge

Report #	Date Closed	Closed By	Comments
8545	3/8/2017	pdodd	
4383	3/7/2017	pdodd	Here on a short vacation. We had such a great experience using bothe the Trolleys and the Jolley Trolley. All the drivers were great and helpful with letting us know where to get off and places of interest. We appreciate their friendliness, kindness, and overall great service.
7722	3/7/2017	pdodd	Says driver was rude and inconsiderate by telling her to fold stroller down, stroller is broken and other drivers just say make sure it's out of the aisle

Highlight the report number and **double click to display the report**.

Reports that have been closed can be purged. By selecting the purge button, reports can be deleted based on the closing date of the report.

Note: Once the report has been purged from the system, it is no longer available for viewing.

Service Desk Reports/Inquires

View Employee Complaints

The following will display. This form shows those complaints made on a specified employee.

Select an employee number from the **Select Employee** drop-down list.

The **Last Name** and **First Name** will automatically display along with any **Service Desk Report Numbers** and the email address of the person who responded will be listed in the **Responding Email** column.

Summary Report

Enter a date range. Click **print** preview the report.

Report Number Search

This form allows you to search for a particular report by **Date**, **Last Name,** or **Bus Route**. After selecting how you want to search from the **Search By** field, selection for your criteria will be displayed.

Fleet-Net provides two ways to utilize this search feature.

Search by value to left- Enter a particular value for example 2/20/2018 and click this button.

Display All by Date-Search all records pertaining to your search criteria.

Service Desk Exception Report

This report summarizes the status of service desk reports not yet finalized, (Completed). It shows all reports not completed and all reports not forwarded to the addressee, (Respondents).

Service Desk Exception Report

Report Number	Incident Date	Reported By	Notes
Reports Not Completed:			
000000000243	7/15/2017	NA 702-555-1111	_____
000000000244		NA 702-555-1112	_____
000000000245	2/1/2018	John Miller	_____
3 report(s) not completed			
Reports Not Forwarded:			
000000000242	7/16/2017	Bob Allen	_____
		Current Email Address List:	
		pdodd@fleet-net.com	
1 report(s) not forwarded			

Preview / Print Service Desk Report

Selecting preview/print from the service desk menu will display the below form.

This report allows you to review or print report information based on a specific report number. From the drop down list select the report number then click OK.

Print Report Selection Form

Report #: [ ] ▼

☐ Print Re	000000000241	7/18/2017
	000000000242	7/16/2017
	000000000243	7/15/2017
☐ Print Ext	000000000244	
	000000000245	2/1/2018

[Print]

Print Report Selection Form

Report #: 000000000245 ▼

☑ Print Reported By

☑ Print Extra Detail Lines

[Print]

Service Desk Report

Report Number:	000000000245	**Reported By:**
Report Taken By:	UNKNOWN – dfigenbaum	Mr. John Miller
Report Taken On:	2/20/2018	1234 Flamingo Rd
At:	6:36:58 PM	
Incident Date:	2/1/2018	LAS VEGAS, NV 89117-
Incident Time:	6:40:00 PM	(702) 123-4567

Comments:

Customer wanted to buy the next passengers pass and the driver wouldn't let him do that. Then while we were in route the driver drove pass a customer waiting for the bus.

Employee Desc:

Location Code: AS	**Notification First Sent:** 2/21/2018	**Conclusion:** V
Route: 1 N	**Bus Number:** 0101	**Bus Direction:** N
Report Method: E	**Response Requested:** E	**Report Type:** 1

Location:

Report Codes	Description
SAMP	Newreport code

Data Description **Other Field Data**

Current Email Address List

Miscellaneous Reports

You may define your own reporting parameters by using the drop-downs and check boxes .To further refine your report parameters, use the calendar icons to provide a date range.

Note: A sort selection must be clicked before previewing the report. Select from the Sort Order drop down.

Click **Print** to preview the report based on the selected criteria. This report can then be printed or save to a file.

Generate a Response Letter

The generate response letter allows for mail merging and mailing of replies to complainants by using Microsoft Office Word mail-merge templates interfaced with the Service Desk Response Letter generator. Templates for these letters should already been written and saved out in a folder.

If this is the first time using the response, Letter Codes will have to be setup. Select the Setup Letter Codes button and the following form will display.

Field	Description
Response Letter Code	Enter an alphanumeric code up to 5 characters to use as a response code.
Response Letter Description	Enter an description up to 50 characters to give a description of the response letter
Path To Executable	Enter the path to your executable file for Microsoft Word. *Note: if using Windows 7 64-bit Path will be similar to: C:\Program Files(x86)\Microsoft Office\Office14*
Name Of Executable	Enter the name of the Microsoft Word executable file [winword.exe]
Path To Document	Enter the path to the location of the stored Template
Name Of Document	Enter the name of the stored Template (**Note:** a template will have to be created before the name of the document can be entered) If you do not have a template contact Fleet-Net and they can provide a standard template.

Once letter codes and templates have been setup, select the Response Letter, Report Type, From/Thru Report Dates and, if applicable, Report Number from drop down.

Response Letter	Select a response letter code. This is required for the program to select the correct letter template.
Report Type	Select a report type to generate letters
From Report Date Thru Report Date	Enter a date range or the same date and be entered into both fields.
Report Number	Select a specific report number or select the All Reports checkbox.

Click on the Build Complainants button. Click **Yes** to continue or **No** to cancel.

The complainants who will receive the selected response letter are displayed.

If you want to send the same letter to multiple applicants, you must select them from this screen. To do so, click on the arrow [▶] on the left hand side of the screen (in the example below, it is pointing at application # 00000241). Hold the shift key and click on arrow to the left of the application number box for each of the applicants that will need the letter. Notice below how the box to the left of the application number box is black. That indicates that both applicants have been selected to receive the same letter.

Click on the **letter button** (second one down), and your letter should open**.**

Click on **Mailings**, then **Start Mail Merge**, choose letters from the dropdown.

Click **Select Recipients**; choose Use Existing List… from the dropdown.
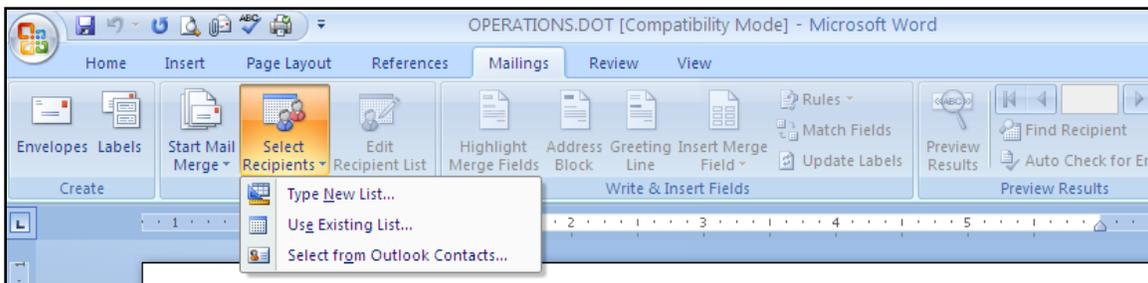
The following window will display then select the data source that will look similar to the data source highlighted in yellow (it will reference the ResponseLetterMailMergeTable). Click Open.
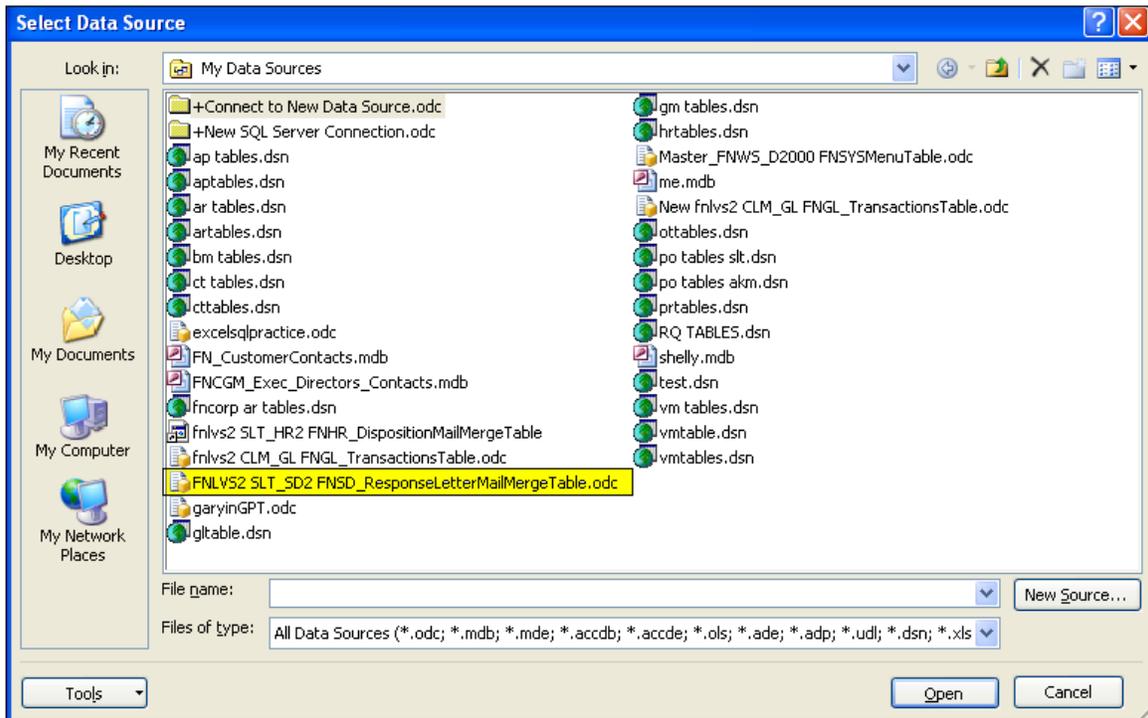
If the Data Sources do not come up as shown above, do the following.
Click the drop down and go to the **C: drive**.
Click **Users** and find your name
Open My Documents, then My Data Sources. The Data Source you need will be in there.

If this is the first time using this feature, the user will need to create a data source name so that Microsoft Word knows where to go to get the names and addresses to put on the letters. This is a setup item and should only have to be done once per user.

Click **New Sources** at the bottom of the screen shown above.

The Data Connection Wizard window will appear. Select Microsoft SQL Server then click **next**.
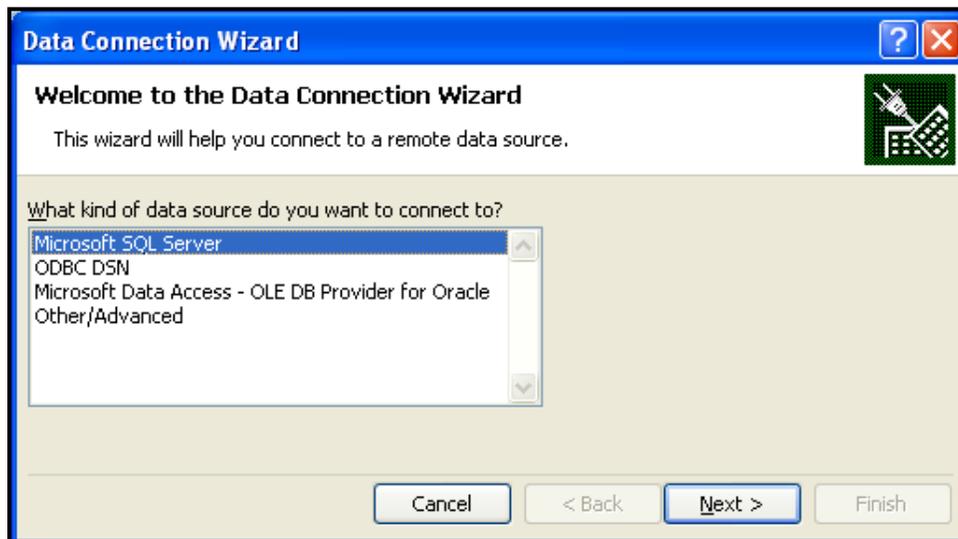
Type in your Server name where the FNW databases are stored and select 'Use Windows Authentication' then click **next**.

Click on the drop down menu and select the **FNSD database**. Then click on the table **FNSD_ResponseLetterMailMergeTable**. Note: make sure the checkbox for Connect to a specific table checked. Click Next.
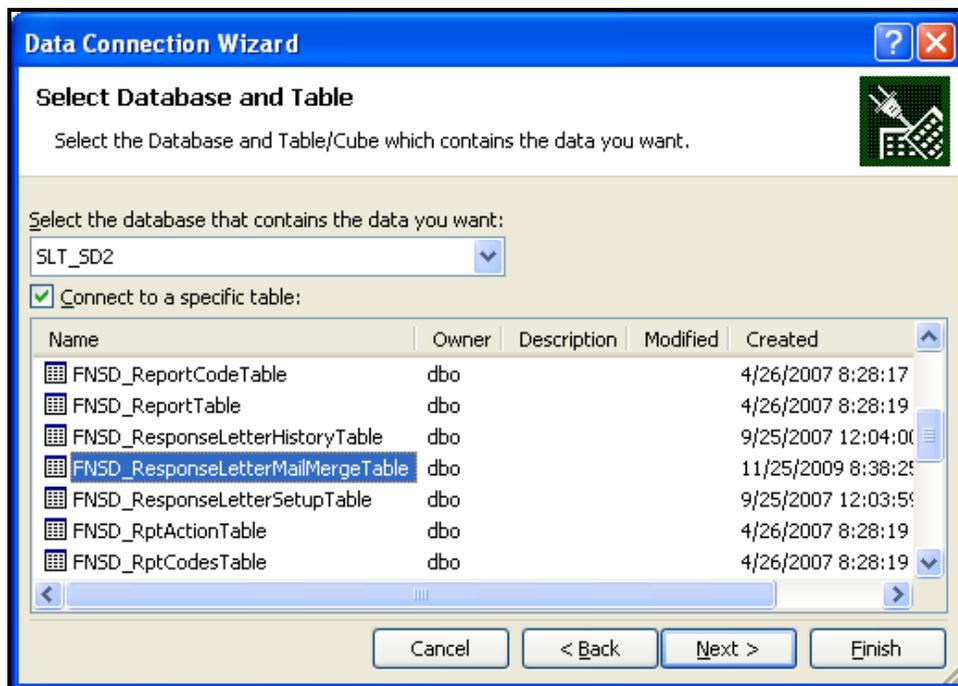
The data connection wizard will now display the name of the data source. The Browse button can be clicked to save the data source to a specific location. Under 'Friendly Name', the data source name can be changed to a shorter and/or different name. Click **Finish**.
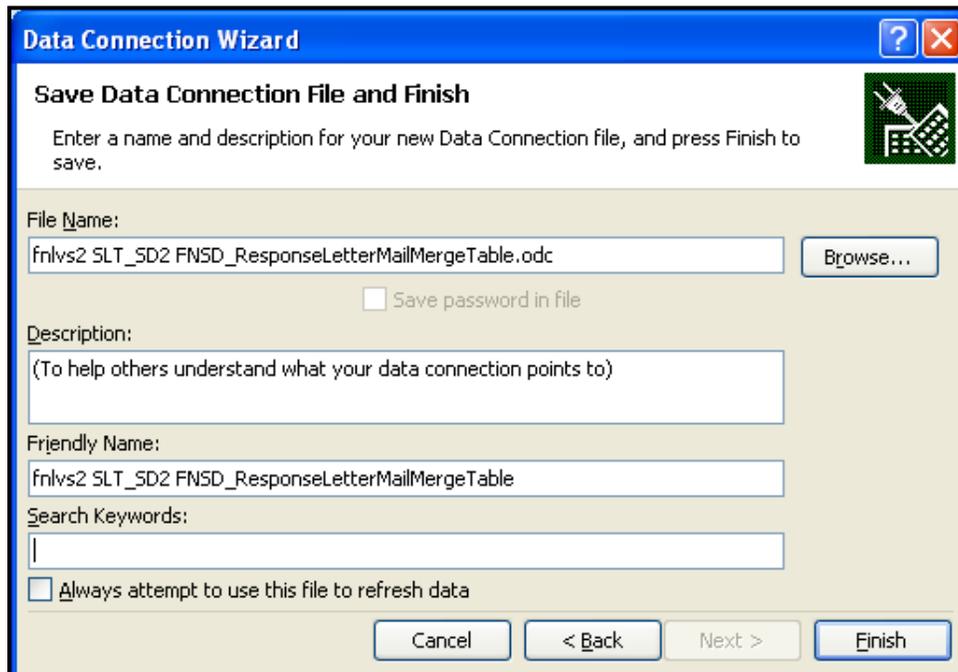
Now you should be able to click on **Select Recipients**: Choose Existing List and see that data source. If you do not see it, do the following.

Click on **My Computer** on the left of the screen and go to your **C: drive**.

Click the **folder Users**. Find your name.

Open Documents or My Documents and then My Data Sources.
There you will find the FNSD_ResponseLetterMailMergeTable that you need. Now you can continue on to the next step.

Click on **Edit Recipients** to see and/or modify the recipient list.
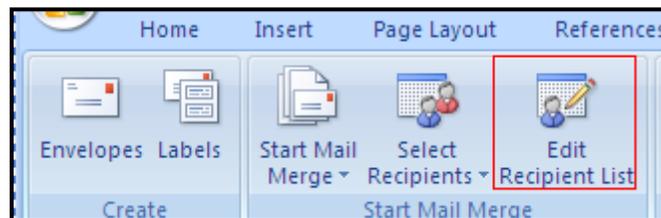
The recipients of the letter are pre-selected based on the selection in Fleet-Net (note the check mark in the box to the left the ReportNumber). If you do not want a letter sent to one or more of the recipients, (perhaps the person did not leave a complete mailing address), click the check box to remove the check mark. Once you have all the recipients selected, click *OK* in the bottom right corner of the screen.
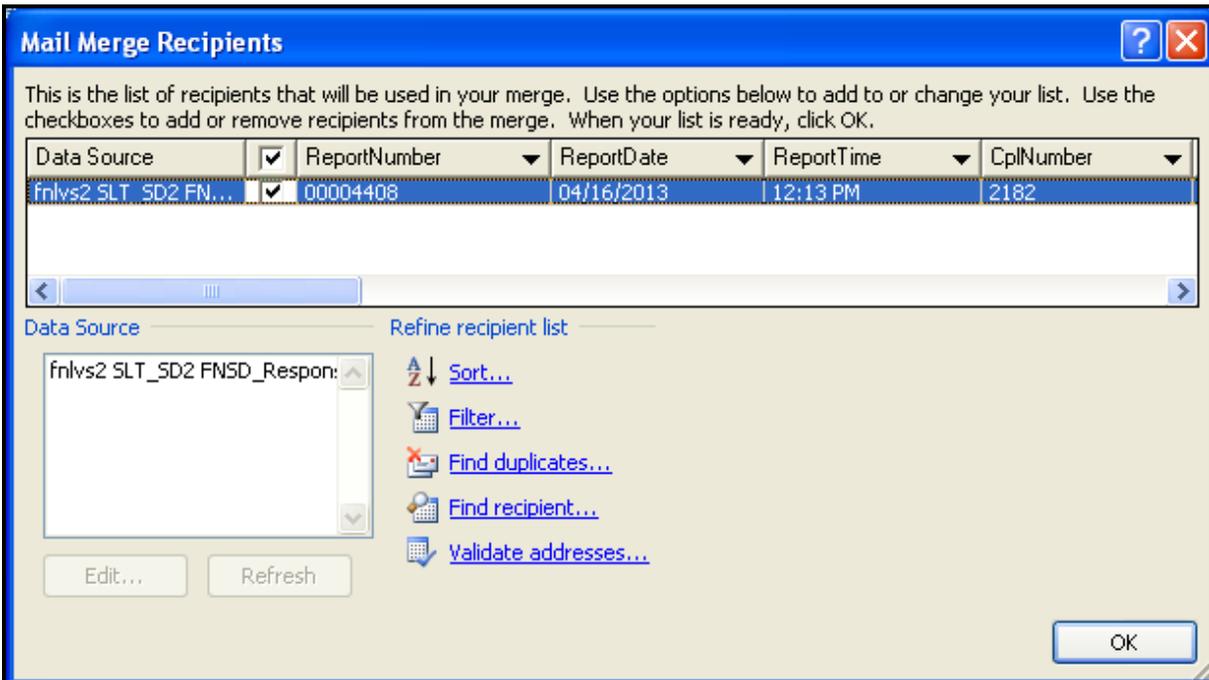
Click **Finish & Merge**. Choose Edit Individual Documents so each letter can be checked for a complete address. This will replace the Merge fields with the names and addresses from the table. Once all the letters have been verified, they can be printed.

NOTE: If the template letter has not formatted, simply click on Insert Merge Fields to add Name, Address, City, State, and Zip fields in the correct locations. Click on Greeting Line to set this field as well. Save the template with this formatting so it only needs to be done once.
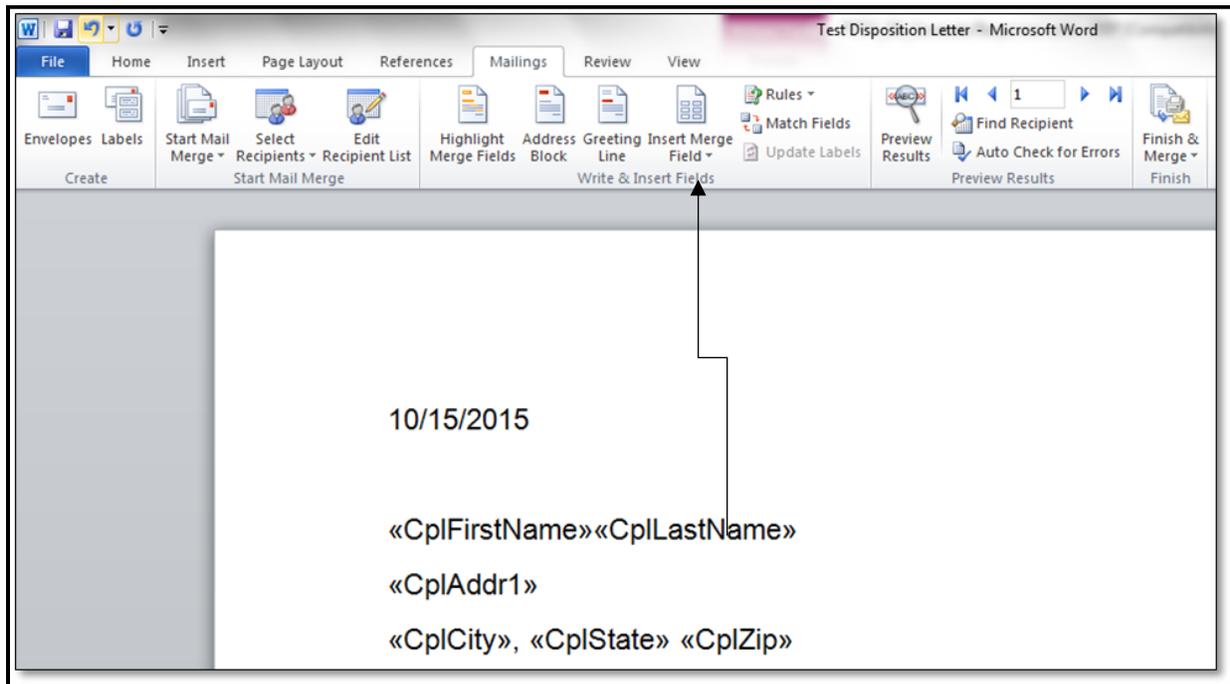
When the letters have been printed and/or saved, close the template and say No to saving the changes.

Return to the Response Letter form in FNW and click on the **Update History** button. The following prompt will appear.
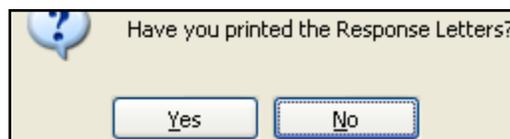
Say Yes to *update* and No to *abort*.

You will receive the following message if Yes is selected:

The database table FNSD_ ResponseLetterHistoryTable will be updated with the date a letter was generated for a report number.

Management Only Report Editing

There are three Service Desk Edit forms. These allow the user to edit either the initial report, the departmental responses, or action taken/report resolution.

Edit Report (Mgmt Only)

Allows editing of all fields on the initial report even after it is closed.

Edit Report and Responses (Mgmt Only)

Allows editing of all fields on the initial report and the departmental responses.

Edit Report/ Responses and Action Taken (Mgmt Only)

Allows editing of all fields pertaining to this report including the departmental responses and the actions taken.

NOTE: Caution should be taken when assigning access to these menu items. It is not advisable that the original complainant's comments, departmental responses and action taken data be modified.