

# **Agents User Guide**

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### 1.1. Welcome

This document is the Agents User Guide for the IssueCentre web application and provides instruction and information on how to use the IssueCentre application. It is targeted at agents using the system to log and update tickets, process inbound emails and report on ticket processing.

Please see the other IssueCentre documentation for further reference:

- Installation Guide
- Administrator's Guide

### 1.2. Browser Configuration

IssueCentre has been tested and approved for the following leading browser versions:

- Internet Explorer version 7.0 and above
- Firefox version 3.0 and above

In order to ensure you get the best user experience with IssueCentre the following browser settings must be configured before use.

- Enable Popups
- Enable Javascript
- Set Check for newer versions of Cached pages to: Every time I visit the webpage

### **1.3.** Typography Conventions

Formatting conventions are used through the document with the following meanings.

ItalicsButton names are formatted in italicsBoldMain menu items are formatted in bold typeHighlighted SectionUseful tips and explanations are highlighted in



### 1.4. Glossary of Terms

The following list describes the meaning of terms used throughout this document.

Term	Description
Ticket	The term used to reference an issue that is to be tracked and resolved.
Event	An action that takes place that has an effect on a ticket. Events may be caused by human intervention, e.g. an agent logging a follow-up telephone call, or by IssueCentre system monitoring e.g. the SLA for the ticket being breached.
Agent	A user that is assigned the task of creating and resolving ticket issues.
Contract	A complete segregation of tickets and configuration that apply to a separate customer contract.
Knowledgebase	A structured collection of FAQs that can be used to resolved commonly occurring ticket issues.
SLA	Service Level Agreement. IssueCentre uses SLAs to ensure tickets are processed within the required timescales.
Record Locking	A means to ensure that two agents do not work on the same ticket/email at the same time
Spam	Unwanted/unsolicited email that is of no commercial value



# 2. LOGIN

To access the IssueCentre application you must enter your login credentials on the login screen. If you do not have a login or do not know the URL required to access IssueCentre please contact your administrator.



Figure 2.1 - IssueCentre Login

Once logged in you will be presented with the main menu from which all functions can be accessed. Please note, the profile that you login as will determine the functions that you can perform and hence what is available on the main menu.

If you have forgotten your password select "Forgotten Password" and then follow the on screen instructions. An email will be sent to your registered address with instructions on how to reset the password.

#### Important

As a security precaution you will have 24 hours to reset your password after making the request.



### 2.1. Main Menu

The main menu provides the following options:

•	New – Ticket/Email/FAQ	To quickly and directly create new Tickets, Emails, and FAQs
•	Contracts	To switch to another contract
•	Tickets	To search existing tickets
•	Email	To view and process the Email inbox

- Dashboard To view the current activity of the IssueCentre
- Knowledgebase To browse and search the Knowledgebase of FAQs
- Ticket Monitoring To open a window to show the status of Tickets under SLA
- Reporting To access the extensive IssueCentre drill-down reports
- Administration
   To administer the users and configuration of IssueCentre
- Logout To exit the application

All these functions are covered in more detail in the following sections.

At the right end of the main menu there is also access to your user profile, displayed as your name. Click on your name to launch the page to edit your user details and change your password.



# **3. USING MULTIPLE CONTRACTS**

Handling tickets for different contracts in IssueCentre is simple.

If your IssueCentre is not configured for multiple contracts then this section is not applicable.

### 3.1 Contract Selection

The ticketing menus of IssueCentre are generally contract specific, meaning that any task you perform (e.g. search/create tickets) will be limited to the currently selected contract. The current contract is always visible by means of the banner across the top of the main screen and also the colours used on the title bars.



Figure 0.1 – Sample Branding

To change to another contract from the main menu select **Contracts** and then select the required contract from the drop down list that appears.

3.2 Log ticket to a different contract





# **4. TICKETS**

All agent work in IssueCentre is centred around the creation and processing of Tickets. Tickets start from a user needing to track an issue. The problem is logged as a new ticket and subsequently all files, data and activity associated with investigating and resolving the issue is stored in the ticket.

This section explains how Tickets are manually created, found and updated by agents.

### 4.1 Creating a Ticket

A new ticket can always be created for the current contract by selecting **New – Ticket** from the main menu. This will open a new browser popup window with fields to capture the information required to create a ticket.

	Add Ticket			
Company:*	Problem			
•	Problem Description	Use a problem des	scription template: Select value from list 👻	1
Contact:*	Summary*			
Product:*	Summary			_
All Products	De e e nin fi e må			
Version: Select value from list	Description*			
Platform: Select value from list				
Version: Select value from list				
Error Type:*				
Select value from list				
Priority:*SLA response is 2 hours				
P3 👻				
Status:*				
Under Investigation				
Tags: Show all tags				
	Internal Notes:		Received By:*	
		~	Please Select	~
			Ticket Owner:	_
			Admin Admin	*
			Supplier Ref:	_
			Client Ref:	
				_
Ticket Timer: 00:10 谲 <i>ฝ</i>			Cancel	

Figure 4.1.1 – Creating a new Ticket



For assistance in creating a new ticket use the following step by step guide.

- 1. Select New Ticket from the main menu
- 2. Select the Contact to which the Ticket is to be assigned. This can be achieved by multiple methods:
  - Select the Company by typing in the first characters to filter the selection to which the contact belongs. Click on the magnifying glass icon ( ) to select the company from the popup list. The popup list can be searched by typing the first characters of the company name in the search field at the top of the popup.
  - If the Company does not exist, a new company can be created by pressing the Company's Add button (C).
  - Select the Contact of the company. Click on the magnifying glass icon ( $\stackrel{\frown}{\longrightarrow}$ ) to select the contact from the company's list of contacts or all contacts, if a company has not been selected.
  - If the Contact does not exist, a new contact can be created by pressing the Contact's Add button ((C)); a company must be selected first.
- 3. Categorise the ticket using the drop down selection fields for Product, Product Version, Operating System, OS Version, Status, Priority, Error Type and Received By. All these fields are mandatory, but some will have been set to their default values to speed up entry. Setting these values will help you find and manage the ticket at a later date.

If any of these categories do not have your required value, please contact your manager to review whether the issue should be supported or whether new entries need to be added to the list of options.

- 4. Ensure that you enter dialog into the Summary dialog box (without this summary you will not be able to load/update the ticket) Enter the details of the problem description. A full explanation of the problem, including steps to reproduce the issue will assist other agents in understanding and processing the ticket at a later date.
- 5. Certain Products may be configured to prompt for specific information to be captured upon creating a ticket. If the product chosen requires additional information, answer the questions displayed onscreen.
- 6. While the ticket is being created a Stopwatch runs in the bottom left of the screen to time how long you are spending on creating the ticket. If required, you can pause the stopwatch while you deal with another issue.
- 7. Press the *Add Ticket* button to create the ticket. The calculated time will be shown but can be overridden if required.
- 8. A summary of the new ticket will be shown, including the unique Ticket No. To continue work on the ticket e.g. to upload an associated file, Press the *Edit* button.

See Section 4.4 for how the ticket can be updated once it's been created.



#### Usage Tip

An agent can work on more than one ticket at a time as each ticket is opened in a separate popup browser window.

#### **Ticket Fields Usage Notes**

The supplier reference field is provided so that if the ticket is being investigated by a 3<sup>rd</sup> party supplier (such as the product vendor) you can store their reference to the issue. The supplier reference can be added to the criteria on the search screen so that the relevant ticket(s) can be found based information provided by the supplier referencing only their reference number.

The client reference field is likewise provided so that if the ticket customer contact supplies their own reference to the ticket this can be stored and searched accordingly.

The internal notes field is provided to store additional private information about the contact or issue that is not made available to the contact through the web interface.

The full descriptions of the drop down selection entries can be obtained by selecting the value and then hovering the mouse over the combo.

#### **Ticket Owner**

IssueCentre allows a ticket to be owned by an Agent. When creating a ticket the currently logged in Agent is shown as the owner. This may be changed though by selecting another Agent from the drop down list.

### Using the Tags

Using the tags provides mechanism for review

Footnote: You will need to be granted permission by your administrator to add tags

Tags:	Show all tags

fingerprint×

Click on "show all Tags" to see what tags are available. If you need to add a new tag you can type the name into the dialog box and then you will be prompted to "create it"

In the image above a tag "fingerprint" has been typed into the dialog box and has been selected. By clicking on the "red cross" it can be removed from the ticket .



### 4.2 Searching for Tickets

Existing open or closed tickets can be retrieved from IssueCentre using the Search screen, select it by choosing **Tickets** from the main menu.

IssueCentre +44 (0) 333 900 1123		
New Tickets Email (18) Knowledgebase Ticket Monitoring	Reporting▼ Dashboard Administration▼ Logout	( <u>Admin Admin</u> - 10/06/2009)
Search Tickets		
Company:	Ticket Ref:	Status: Select value from list
Contact:	Client Ref:	Priority: Select value from list
Vendor: Select value from list	Supplier Ref:	Text:
Product: Select value from list	Company Ref:	Results per Page:
Tickets: Open tickets	Date From: 10 to 10	Result Format: Ticket 💿 Issue 🔿
Tags:	Ticket Owner: Select value from list	Search

Figure 0.1 – Ticket Search Criteria

The default criteria will return a list of all currently open tickets. Use any of the criteria fields at the top of the screen to limit the results to the tickets of interest.

The format of the results displayed can be switched between two modes; the default mode shows the primary ticket category columns, and the issue mode shows part of the issue description. Select this alternative mode by selecting the Issue Radio button on the search criteria panel.

The result lines will be coloured according to their assigned priorities, as configured by the administrator. Icons may be displayed at the end of each row to show whether the ticket has a reminder set () and/or the SLA has been breached. The colour of the icon changes from green, to orange to red as the time of the reminder nears.

N.B. If you have multiple contracts configured, the search will be limited to the currently selected contract.

Use the following step by step guide to understand the how to locate your tickets.

- 1. Select **Tickets** from the main menu.
- 2. Enter the required search criteria in the fields
- 3. Select the output format using the Issue and Ticket radio buttons
- 4. Press the Search button to obtain a list of results that match the criteria
- 5. The results can be viewed/edited in the following ways:
  - Use the paging buttons (IC C 26-50 of 395 (S) (S)) at the bottom of the list to navigate between result pages



- If the ticket is currently being edited by another agent the ticket cannot be edited and will show a Padlock icon instead of the Edit icon. Hovering the mouse over the Padlock icon will show the name of the agent that currently has the ticket locked.
- Clicking on the Padlock icon allows the lock to be forcibly removed. A reason for forcing the lock removal must be provided.
- Click on the list headings to change the order of the results
- Click on the unique Ticket number hyperlink to view the Ticket in read only mode
- Click on the Edit icon (icon) next to the ticket reference to edit the ticket

### 4.3 View Ticket

To view a ticket <u>without</u> locking it for update, click on the ticket number in the search results. This will display all of the ticket details in a new popup browser window. Any number of tickets can be opened in this manner as required without affecting other Agents use of the system.

				Ticket No: 105741		
Ticket Raised By			Classification		Supplementary Info	
-	P11 McTulle		Product: Priority: Error Type: Status: Owner: Internal Notes:	MaiL P5 Bug Found <i>Under Investigation</i> Mike Edwards	Supplier Ref: Client Ref: Last Updated: <u>06/06/2009 22:17</u>	
Summary: low prio	rity issue					
Date	Event Type	User	Des	cription		
06/06/2009 22:17	Ticket Created	MRE	low	priority issue		
06/06/2009 22:17	Ticket Updated	MRE	Con Con Prov Ope Ope Rec Prio Prio	rmation updated: npany: Cranes High tact: Lorrie McTulle duct: Mail duct Version: 10.5.7 erating System: Mac OS X erating System Version: Leopard eived By: Email or Type: Bug Found rity: P5 tus: Under Investigation		
Ticket His Viewed on 10 June 2						

Figure 4.3.1 – View Ticket (read only)

The window displays all the summary information at the top and then the history of the events activity that agents and the customer have performed on the ticket in chronological order. This will display all work performed on the ticket, including files uploaded, emails sent, information added etc.

Below the ticket Events list the history list shows the history of changes to the key tickets fields, such as Product, Status, Platform etc. This allows you to see in particular how the status of the ticket has changed over the lifetime of the ticket.

Pressing the *Print* button will produce a printout of the full ticket details. Clicking on the Edit icon (|P|) at the top of the screen will change the window to the Edit Ticket screen as described in the next section.



### 4.4 Updating Tickets

Selecting to edit a ticket will lock the ticket to the currently logged in agent, preventing other agents from working on the same ticket for the duration the agent is viewing and making changes to the ticket.

			Ticke	et: 105741				
Company:*	Problem	Events F	iles Reminder	Knowledge Base	Notifications			
Cranes High 🛛 🖓 😯		n Descri						
Contact:*	Froblen	n Desch	puon					
Lorrie McTulle	Summary*							
SAMP11	low priority i							
© 000 457457547	Description	ı*						
000 3562365365	low priorit	ty issue						
Iorrie@craneshigh								
Product:*								
Mail 💌								
Version: 10.5.7								
Version: Leopard								
Error Type:*								
Bug Found								
Priority:*SLA response is 10 hours								
P5								
Status:*								
Under Investigation								
Tags: Show all tags								
	Internal Not	tes:					Received By:*	
					<u>_</u>		Email Ticket Owner:	*
							Mike Edwards	~
							Supplier Ref:	
					~		Client Ref:	
Ticket Timer: 00:36 🍓 🥔						🖌 Update	🍃 Print 🛛 Email	🔀 Cancel
Ticket Timer: UU.30 🐚 💋						opuate	gernine Esternion	w concer

Figure 4.4.1 Edit Ticket

In order to free the lock and allow other Agents to update the ticket, the Agent must remember to press the *Update Ticket* button and choose to close the window or press the *Cancel* button to close the ticket.

Editing a ticket shows the full details of the ticket in a popup browser window. In addition to the initial problem details entered, further information can be viewed and entered using the multiple tabs displayed across the top of the screen. Each of these tabs is described in detail in the following sections.

#### Important

If the ticket window is closed directly using the Window's system close button, the ticket will remain locked.



When the agent next selects **Tickets** from the main menu the agent's currently locked tickets will be listed and given the opportunity to release the lock.

In order to ensure tickets aren't locked longer than necessary it is highly recommended that the *Cancel* button is used to close the ticket if changes are not to be stored.

### **Events Tab**

			Ticke	t: 105741			
Company:*		Problem Events	Files Reminder	Knowledge Base Notif	ications		
Cranes High	20	Events					
Contact:*							
Lorrie McTulle	20	The history of events t Date/Time	hat have applied to this User	s ticket Type	Time Spent (mm		
SAMP11		06/06/2009 22:17	MRE	Ticket Created	0:42	:88)	
000 457457547				Total Event Time	0:42		
000 3562365365							
Iorrie@craneshigh							
Product:*							
Mail	~						
Version: 10.5.7	~						
Platform: Mac OS X	~						
Version: Leopard	~						
Error Type:*		Event Type: Select	value from list	~			
Bug Found	~						Save
Priority: SLA response is 10 hours							No Save
P5	~						
Status:*							
Under Investigation	~						
Tags: Show	all tags						
		L					
Ticket Timer: 00:26 🆓 🌌	3				🖋 Update	😂 Print 🛛 🖂 En	nail 🔀 Cancel
Ticket Timer: UU.20 💷 能							

The events tab shows the list of manual agent generated events that have been recorded for the ticket. The events are listed in chronological order so that the agent can view the full history of the ticket from when it was first created.

Clicking on an event from the list displays the full text of the event in the field below.

To add a new event to the ticket, press the Create a New Event button.

To calculate the amount of time spent resolving the ticket issue, against each ticket the user must set the amount of time spent on the event

#### **Files Tab**

Any type of file can be uploaded and associated with a ticket. This allows you to store screenshots, configuration files, error logs and any other file information that has been collected to help diagnose the issue. Please note that customers that have been given access to IssueCentre can also upload and view files on a ticket.

						Ticke	t: 105741			
Company:* Cranes High			Problem	1 Events	Files	Reminder	Knowledge Base	Notifications		
Contacti* Lorrie McTulle		<b>PO</b>	The list o	f files that ha	e been	associated w	th this ticket	File Name		File Siz
SAMP11 © 000 457457547 © 000 3562365365 © brrie@craneshigt	,		10/06/20	009 11:47		Agents		Banner Ip		13 H
Product."										
Mail		~								
Version:	10.5.7	~								
Platform:	Mac OS X	~								
Version:	Leopard	~								
Error Type:*										
Bug Found		~								
Priority: SLA response P5	e is 10 hours	~								
Status:"										
Under Investigation		~								
Tags:	2	how all tags	File:						Browne	
Ticket Timer: 03	:37 🚳	<i>i</i>							🛹 Update 🛛 🖓 Print 🔛 Email 🗧	Cancel

To upload a file, press the *Browse* button, select the file from the file system and then press the *Upload File* button.

To view a previously uploaded file just click on the filename hyperlink in the list.



	Ticket: 105741
Company:* Cranes High	Problem Events Files Reminder Knowledge Base Notifications Reminder
Contact" Contact" Contact" Contact" Contact" Contact" Contact" Contact	Reason         June 2009         Add Reminder           1         2         3         4         5         6           7         6         9         10         12         23         4         5           8         Mo Tu We Th Fr Sa         1         1         2         3         4         5         6           1         1         2         3         4         5         6         7         6         9         10         12         13         14         2         13         14         2         13         14         2         13         14         15         10<
Ticket Timer: 02:29 🍓 🌌	🖋 Update 🛛 🖗 Print 🔤 Email 🔀 Cancel

### Reminder Tab

This tab provides a means to set a reminder to perform an action to a ticket at a future date and time. Tickets with Reminders set will show up with coloured icons in the Ticket search results. In addition email notifications can be configured to be sent to the agent when the reminder time is reached.

#### **Knowledgebase Tab**

This tab provides access to the knowledgebase to allow the agent to search for an FAQ that matches the ticket issue. The knowledgebase automatically navigates to the category associated with the product that the ticket relates to.

The use of the knowledgebase is described in more detail in section 6.0.





				Ticke	: 105741					
Company:" Cranes High		20	Problem Events Notifications	Files Reminder	Knowledge Base	Notifications				
Contact:" Lorrie McTulle		70	Notifications are not c	onfigured to be sent to	the customer for thi	s ticket.				
SAMP11			This list shows the hist	ory of notifications rais	ed by this ticket.					
000 457457547 000 3562365365 lorrie@craneshigt			Date/Time 08/06/2009 09:18	To Mike Edwar	Rea ds New	son Ticket Creation (Age	nt)		Method Email	Status Sent
g onegcialesing	1									
Product:*		_								
Mai .		*								
Version:	10.5.7	*								
Fidulotine	Mac OS X	*								
Consistent.	Leopard	*								
rror Type:* Bug Found		¥								
riority:*SLA response	e is 10 hours									
P5		¥								
Status:"										
Under Investigation		w al tags								
fags:	50	ow al tags								
licket Timer: 00		da.					🖉 Update	🐣 Print	🖂 Email	🔀 Cancel
iicket Timer: UU	.23 🐚	1					• opdute	3 vinit		w concer

### Notifications Tab

This tab provides the details of all the email notifications that have been sent during the lifetime of this ticket.

Notifications may optionally be switched off from this screen; this is dependent on the agents permissions.

Pressing the *Email* button from within a Ticket the user can send an email to the customer or another contact that will be recorded directly to the ticket event

history. The email will default to ser

The email will default to sending to the ticket contact and will have a signature added to the email body of the current logged in user.

The recipient, CC and BCC fields can all be set to other addresses as required. Multiple email addresses can be supplied by separating each address with a semi colon (;). File attachments can also be added to the email by pressing the *Browse* button to select the file and then pressing the *Add Attachment* button.

Email from issuecentretest@fosolutions.co.uk		
	01:10 🎕 🥔	🔀 Back
To: lorrie@craneshigh.		
Send CC:		
BCC:		
Subject:"Message from IssueCentre (REF#105741)	Please Select a T	emplate 💌
Event: Select value from list		
Fort Name and Size     Fort Style     End Style     End Style     Interstrain Style     Inter	Links	
File: Browse	🛒 Add atta	chment

### **Email from Ticket**

IssueCentre provides full email integration with email sending from within tickets and inbound emails managed for all contracts through the central Email inbox.

Sending emails from within IssueCentre ensures that all emails are audited and that the From and Reply-To addresses are correctly configured for the contract brand. We therefore recommend that all email activity is performed within IssueCentre and not from any external email clients.



### 4.5 Sending an Email

Emails can be sent from one of three places within IssueCentre:

- Email from within a ticket
- Send a general email
- Reply/Forward a received email

Emails relating to a ticket issue should always be sent from the Edit/Update Ticket screen so that the email is audited within the ticket history and hence other agents can be aware of all communication with the ticket customer.

### To send an Email from a Ticket

From the Update Ticket popup window, press the Email button. The ticket screen changes to an email screen, as shown below, and allows an email to be created. The email To field is defaulted to the email address of the ticket contact, but can be overridden and added to as required.

			Email from issuecentretest@fosolutions.co.uk		
				01:10 🍇 🥔	🔀 Back
	Send	To:* CC: BCC:	lorrie@craneshigh;		
		Subject: Event:	Message from IssueCentre [REF#105741] Select value from list	Please Select a	Template 💌
	ont Name a Arial		Font Style     Paragraph Style     Indenting and Lists       13     Image: Comparison of the style     Indenting and Lists       13     Image: Comparison of the style     Indenting and Lists	Links	
L					
	File:		Browse	🛒 Add att	achment

As the email is added as an event, an Event Type and time spent on the event must also be specified.

You may select to attach any of the files already associated with the ticket or upload a new file to be sent with the email. Email's sent from this screen will be associated with the ticket and recorded in the Events list.

Figure 4.5.1 – Email from a Ticket

You may choose to return to the ticket without sending the email at any time by pressing the *Ticket* button at the bottom of the screen.

### Send a General Email

This option should only be used to send emails that do not relate directly to a ticket issue e.g. a general announcement. Using this method to send the email ensures the From and Reply-To address of the email is set to the correct address for the currently selected contract.

To send a general email, select **New – Email**, from the main menu. A popup browser window is displayed allow the user to complete the normal email fields for the To, CC, BCC, Subject and Content. Attachments can be added to the email by selecting and uploading the files to the list below the message edit field.



Email from issuecentretest@fosolutions.co.uk	
To:*       Send       BCC:       Subject:*	Please Select a Template V
Font Name and Size     Font Style     Alignment     Paragraph Style     Indenting and Lists       Arial     I	Links
File: Browse.	Add attachment

Figure 4.5 4.5.2 – Send a General Email

Press the Send Email button to send the email to all the recipients.

#### **Reply/Forward to a Received Email**

An email received in the Email Inbox can be forwarded or replied to directly from the Inbox. As before, an email sent in this manner will not be associated with any ticket and therefore this is only recommended for emails that do not relate to ticket issues. The functionality to send to multiple addresses, CCs, BCCs and adding attachments is all standard.

Replying and forwarding an email will include the forwarded email body in the new email body text to be sent out.



### 4.6 Email Inboxes

	-	Tickets Email (18)	) Knowledgebase Ticket Monitoring Reporting▼ Dashboard Administration▼ Logout		( <u>Admin Admin</u> - 10/06/200
less	ag	es		R	nboxes 💦
firs	t < p	prev <b>1</b> next > last >>			E Diboxes (18)
	_	From	Subject	Received	Unassigned Emails (3)
	Ô	Mike Edwards	FW: [BULK] 5 Strategies for Providing Superior Tech Support While Cutting Costs	09/06/2009 13:51	IssueCentre (15)
	Â	Mike Edwards	FW: [BULK] Manager's Guide to Oracle Cost Containment and more	09/06/2009 09:37	Processed Emails
	â	Mike Edwards	FW: [Upcoming Webcasts] Subversion Best Practices: Maximizing Productivity	08/06/2009 14:16	Unassigned Emails     Definition Sector (5)
9	ê	Mike Edwards	Demo at 10:00 today	08/06/2009 09:31	È · · · · · · · · · · · · · · · · · · ·
	Ô	Mike Edwards	Fw: Paragon Software Group recommends Ashampoo's Core Tuner	06/06/2009 22:15	Jun (5)
	à	Mike Edwards	Fw: Get a Valuable Gift Card for Anywhere Anytime Sun Training	06/06/2009 21:35	□ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □
	Ô	Mike Edwards	Fw: 15.4" Laptop from £332.35 inc vat @ Novatech!	06/06/2009 21:05	
	Ô	Mike Edwards	Fw: DZone Refcardz #54: Using Agile Practices to Reduce Costs	06/06/2009 21:05	
	ĝ	Mike Edwards	Fw: DZone Refcardz Update #53 - Your Fast Track To Expert Knowledge	06/06/2009 21:02	
	Â	Mike Edwards	[Fwd: New Ticket Created]	05/06/2009 17:00	
	à	Mike Edwards	[Fwd: Message from IssueCentre [REF#105733]]	05/06/2009 12:48	
	Ø	Mike Edwards	Re: Message from IssueCentre [REF#105734]	04/06/2009 18:06	
1	~	·		× ×	
	_				
3	Ma	rk Spam 🔊 Mark Pro	ocessed 🗔 Add to Ticket Ӱ Create Ticket 🍙 Reply 🖂 Forward 🍓 Lock	Assign to:Select folder 💙	
rom ont om o: is	act: pan; sue 08/0	ke Edwards <me@firstop Glenn Mitchell y: Williams and Son centretest ≺issuecentret 06/2009 14:16</me@firstop 	•	Ē	
rom: ent:	Agi 05 J ike E	ial Message le Journal [mailto:enews( June 2009 20:06 :dwards Upcoming Webcasts] Sul	@agilejournal.com] Ibversion Best Practices: Maximizing Productivity		
			M Crossroads		

The email inboxes provides the location to view and process emails received for all of the IssueCentre contracts. The Inbox provides the means for agents to create new tickets from emails, assign emails to existing tickets and process non-ticket related emails.Ticket based emails sent from IssueCentre will include the ticket reference within the email subject (in the format [#REFTicketNum] such that if the customer replies to the email and leaves the subject as is, it will allow IssueCentre to assist in matching the reply to the original ticket.

The email inbox is laid out as most familiar email clients with a collapsible folder panel on the right of the screen, a list of messages for the selected folder to the left and the currently selected message in a panel below. Each paneled area can be resized using the splitter bar. In addition the Inboxes panel can be hidden from view by

collapsing it using the arrow button () at the top of the panel.



The list of inbox emails is refreshed every 30 seconds so that new inbound emails are added and emails processed by other agents are shown as locked or removed.

Inboxes	>
inboxes (20)	
Dnassigned Emails (3)	
issueCentre (17)	
Processed Emails	
🗄 🛅 Spam	

Figure 4.64.5.1 Email folders

Two high level folders are always displayed, Inboxes and Processed Emails. Within each of these folders a folder is provided for each IssueCentre contract. The numbers next to each folder show the number of emails that currently reside within the folder. The number next to Unprocessed Emails shows the total number of emails that are yet to be processed across all of the folders below.

The unassigned emails folder is used to store emails that have been received into the inbox but that do not match any of the contract email addresses.

Selecting a folder from the list will update the messages list to show the contents of the folder and all folders below it. It will also set the screen branding to the corresponding contract to which the folder and its content relates.

### **Emails List**

Selecting an email within the Unprocessed folder will set the screen branding to the corresponding contract to which the individual email relates.

LssueCentre +44 (0) 333 900 1123								
N	ew▼⊺	Tickets Email (18) k	( <u>Admin Admin</u> - 10/06/2009)					
Me	ssage	es		æ	Inboxes >			
< 1	irst < p	rev 1 next> last>>	🗄 🇁 Inboxes (18)					
		From	Subject Received		Drassigned Emails (3)			
	Â	Mike Edwards	Error with Websphere 0	4/06/2009 12:41	issueCentre (15)			
	Â	Mike Edwards	IssueCentre demo at 14:00 0	4/06/2009 09:02	Processed Emails			
	Â	Mike Edwards	[Fwd: AdWords Report Request   Placement / Keyword Report] 0	1/06/2009 20:43	⊞- 🚞 Spam			

Figure 4.6.2 – Emails List

Emails in the Unassigned emails folder message list can be dragged and dropped into the correct folder using the folder list.



### 4.7 Processing an Email

This section explains how agents process the emails in the inbox. The processing is performed using the toolbar buttons displayed at the top of the email.

🔅 🥶 Mark Spam 😰 Mark Processed 🎯 Reply 🗟 Forward 👪 Lock

Assign to: --Select folder-- 🗸

Figure 4.7.1 – Email Toolbar

#### Lock Email

If an agent wishes to prevent any other agents from working on an email but does not wish to process it themselves yet they can lock the email. To lock an email, select the email from the list and press the *Lock* button from the email toolbar. You must provide a reason for locking the email so that other agents understand whether the email has been locked on purpose.

#### **Unlock Email**

A locked email can be forcibly unlocked by clicking on the email's padlock icon in the email list. Before unlocking an email the agent should check whether the email has only recently been locked or whether the email has been locked for a reason – both of which are shown when hovering over the padlock icon. To forcibly unlock an email you must provide a reason.

### **Processing Spam**

If an email is received that is spam and has no relevance to the data stored in IssueCentre then the email can be marked as Spam and hence removed from the Inbox and disregarded. Spam emails remain in the database but are no longer accessible from the application.

To mark an email as Spam select it in the Inbox and press the Mark Spam button at the top of the email.

#### **Processing Non-Ticket Emails**

If an email is received into the Inbox that is relevant to the agents but is not directly linked to a ticket (such as a department notification), nor is it spam, it can be marked as "*processed*". Marking an email as processed moves it to the contract's corresponding Processed folder.



#### **Reply to Email / Forward Email**

If an email is received into the Inbox that is relevant to the agents but is not directly linked to a ticket (such as a department notification), it can be replied to or forwarded directly using the *Reply* and *Forward* buttons on the email toolbar.

#### Important

This function should not be used if the email relates to a ticket. If the email relates to a ticket it should be added to an existing ticket or a new ticket created and then the reply performed from within the ticket. In this way it ensures that the history of the ticket is maintained and the work can be properly reported on.

#### **Create Ticket**

To convert an email into a ticket, from the email press the *Create Ticket* button. This will open the Create Ticket screen in a popup browser window and set the ticket details from the email content. If possible the ticket will be initialized by with the Company, Contact and Problem description. The company and contact will be set by looking up the Email From Address in the contacts list. The ticket problem will be set to be the email body content.



### Add to Ticket

If an email relates to an existing ticket and is a reply to an email sent from IssueCentre then the email subject should include the ticket reference number. If this is the case pressing the *Add to Ticket* button will automatically match the email to the correct ticket and show them on top of each other. The agent should confirm that the match is correct and then press the *Add to Ticket* button.

Alternatively, if the ticket has not been matched the agent can search the IssueCentre by the ticket reference, supplier reference or the client reference.

			Add to Existing Ticket		
105747	Supplier Ref:	Client Ref:	Search		
🗔 Add to Ticket					
i wish to report a pro From: Mike Edwards To: issuecentretest Date: 04/06/2009 16:51	oblem				
I recently installed					
1 of 1 Matching Tic Ticket Raised By	kets	Classification	Ticket No: 10	55747 Supplementary Info	3
Company: First Optic Ref: Contact: Mike Edwar © 000 234535- © 000 265677i @ me@fosolut	ds 4354 87756	Product: Priority: Error Type: Status: Owner: Internal Notes:	Computer-1 P2 Configuration <i>Under Investigation</i> Mike Edwards	Supplementary mo Suppler Ref: Client Ref: Last Updated: 08/06/2009 10:18 © 10/06/2009 12:00	
Summary: issue reporte	d				
Viewed on 09 June 2009 a	at 14:47				

Figure 4.7.2 – Add to Ticket

If the email relates to multiple tickets, for example because it's an outage notification from a supplier, the email can match and be applied individually to each of the relevant tickets.



## **5** USING THE DASHBOARD

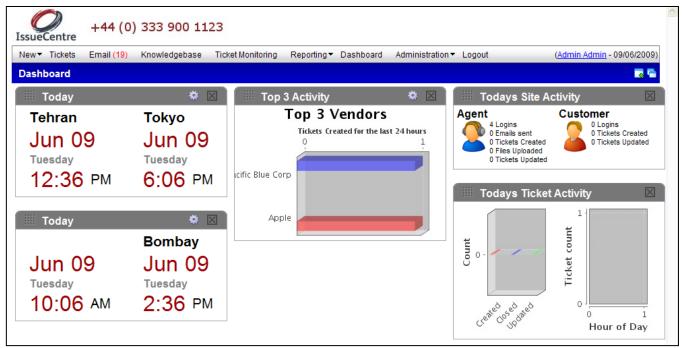


Figure 5.1-The Dashboard

The dashboard is a tool to allow visual impact of events taking place within IssueCentre. It can be configured to show any number of panels to meet your need



	( <u>Admin Admin</u> - 11/06/2009)
Add a Panel	$\bowtie$
Notices Open Ticket (Active contract) Today's Ticket Activity Today's Site Activity Total Ticket Activity	
Today Shortcuts	
Top 3 Statistics Open Tickets (All contract) Agent Activity	
Todays Email Activity	

Using the buttons in the top right of the screen you can click the button on the left and a new window will show the Add a Panel. Using your cursor hover over and then left click the line "Notices". A new panel will appear showing the latest notices published.

		( <u>Admin Admin</u>	- 11/06/2009)
			<b>.</b>
Not	ices		$\mathbf{X}$
Last Week	04/06	IssueCentre Demonstration Monday	
Last Week	04/06	IssueCentre Demonstration	

Figure 5.1.2 – Adding a Panel

Footnote: You can click the "window icon" to display the panels in a separate window.

Today	* 🛛	You ca
	Bombay	"cog"
Jun 11	Jun 11	$\overline{}$
Thursday	Thursday	
2:18 PM	6:48 PM	

You can move the panels around by allowing your mouse cursor to "hover" over the title of the panel; pressing the left button of your mouse hold and move to the desired place on your screen.

When you are done with a panel you can click on the black square icon to close the panel.

You can also configure the panel as required by clicking on the "cog" icon; when done simply click "save".

	Settings for panel: Today	>
Format:*	12 Hour	
Format.	© 24 Hour	
Clock 1:*		
	(GMT +1:00 hour) Brussels, Copenhagen, Madrid, Paris	
Clock 1 Label		
Clock 2:*	(GMT +5:30) Bombay, Calcutta, Madras, New Delhi	~
Clock 2 Label	Bombay	
	✓ Save	

Figure 5.1.3 – Configure the Panel



### **Knowledge Base**

The knowledge base provides a central repository for common solutions to user issues. It allows your agents to share their knowledge and quickly and easily access solutions to previously solved problems.

The knowledge base is tightly integrated into IssueCentre making it easy for agents to find and use the FAQ information.

### 6.0 Finding FAQs

To browse and search the knowledge base select Knowledge base from the main menu. FAQs are grouped into a hierarchy of categories which can be browsed by clicking on the name of a subcategory. Navigating to a

subcategory will show the list of FAQs in the category and potentially further subcategories.

Alternatively, you can directly search for FAQs within the categories you are viewing using the Search panel on the right side of the screen. Enter a search term that you wish to find, which fields to look for the term in and press the *Search* button. The Search results appear in a list below the categories.

Note, that the search performs within the currently selected category. Therefore to search the entire knowledgebase you need to navigate to the top level category (called Home).

Would you like t	
🔒 🛛 Add a new	/ FAQ
Approve F.	AQs
💋 Category I	Maintenance
Text Search Search for:	
search for:	
FAQ Titles	
FAQ Descrip	tion
FAQ Content	t
FAQ Attachn	nents
🔍 Search	🔀 Clear

Figure 6.0.1. – Search for a FAQ

Se	earch Results
	B00002: Page Numbers
	How do I insert page numbers on all pages of a document except the first page?
	Last modified: 3 Jun 2009

Figure 6.0.2 – List of Results

### View an FAQ

To view an FAQ simply click on the title and the full information and its attachments will be displayed.

From the right hand panel the FAQ can be printed or emailed onward. If you have been granted the appropriate privilege you may also select to update the content of the FAQ.



### Creating a new FAQ

To create a new FAQ click on the Add a New FAQ hyperlink from the actions panel on the right side of the screen or choose **New – FAQ** the Main menu.

LissueCentre +44 (0) 333 900 1123	
New Tickets Email (18) Knowledgebase Ticket Monitoring Reporting Dashboard Administration Logout	( <u>Admin Admin</u> - 10/06/2009)
New FAQ	
Title:" Description:" Content: " Alignment: Paragraph Syle Indending and Liss Links And B Z D Ax A* D C E E E E E S Iormal E E E E S Iormal Syle E E E E S Iormal Syle E E E E S Iormal Syle E E E E E E S Iormal Syle E E E E E E E E E E E E E E E E E E E	FAQ Summary Make available to: All users Rating: Unrated Created by: Admin Admin on 10 Jun 2009 Save Cancel
Categories Attached Files Related FAQs	
i⊕issueCentre	

Figure 0 – New FAQ Screen

The full process for creating a new FAQ is as follows.

- 1. Enter a title and description for the FAQ
- 2. Enter the main content of the FAQ providing a full description of the steps to be taken to resolve the issue.
- 3. Select the Attached Files tab to upload any helpful files that are referred to in the FAQ and that can provide additional information.
- 4. Select the categories into which the FAQ is to be located. The FAQ can be placed in multiple categories, and therefore should be placed in all those where it is applicable.
- 5. If there are other FAQs that may also be of relevance to this FAQ, select the Related FAQs tab and search for similar FAQs that can be associated with this new FAQ.
- 6. Use the FAQ Summary panel to select whether the FAQ is to be made available to agents only or to all users.
- 7. Select a rating to apply to the FAQ to assist users in understanding the quality of the FAQ.
- 8. Press the Save button to create the FAQ. The FAQ must be approved by a manager before it becomes visible and searchable within the knowledgebase.



### 6.1 Managing the Knowledgebase

#### Create a new FAQ Category

The FAQs are stored in categories organized as a hierarchical tree. The category tree is maintained by selecting Add a New Category from the Knowledgebase action panel menu.

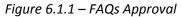
To create a new category, navigate the category hierarchy and select the desired parent category in the list. Enter the name and description of the new category and press the *Save* button.

#### **Approve FAQs**

New FAQs must be approved by a user with the FAQ Approval privilege. To approve newly submitted FAQs the user must select Approve FAQs from the Knowledgebase action panel menu.

The screen displays a list of the FAQs awaiting approval and the user may select to view and update the FAQs as desired. Once complete the user can mark those to approve and upon selecting the Approve Selected FAQs button the FAQs will become available to the Agents and Customer Users according to the FAQ profile.

FAQ Title	Created/last updated by	Need approval on	Last modified	Approve
How to unlock a account	Ryan Brown (RYANB)	Updated	2008-12-01 00:17:18.7 <mark>4</mark> 1	
How to register a new user	Adrian Ashworth (ADRIAN)	Updated	2008-11-03 10:45:20.638137	
How to recover from a lost password	Adrian Ashworth (ADRIAN)	Updated	2008-11-03 14:44:39.435265	
How to perform a brand new installation	Ryan Brown (RYANB)	Updated	2008-11-09 18:04:18.978174	
How to create a new user	Adrian Ashworth (ADRIAN)	Updated	2008-10-30 12:22:57.358	



#### **Update/Delete an FAQ**

To update/delete an FAQ, navigate to the FAQ as described earlier and from the View FAQ page click the Edit this Page hyperlink within the action panel menu on the right side of the screen.

This displays the FAQ update screen from which the FAQ may be changed and Updated or Deleted from the action panel.

