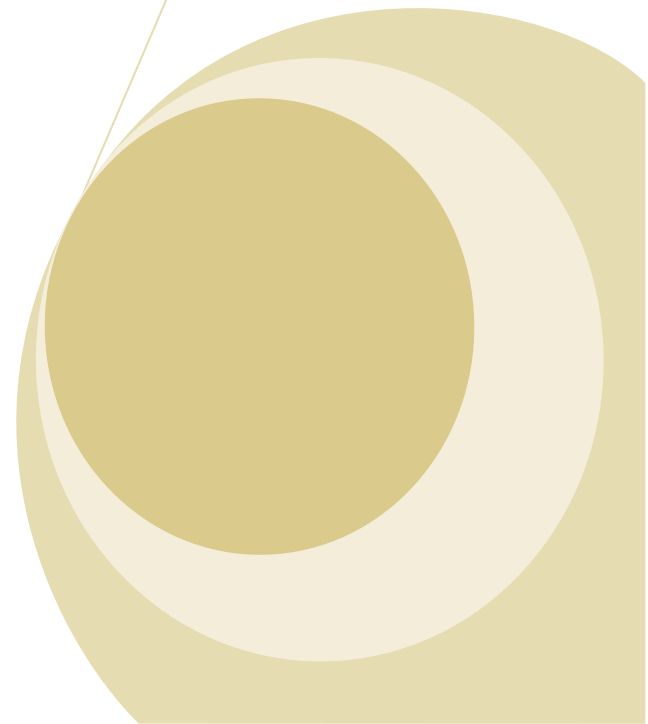


# QueWeb Customer Care Open Source Edition

Administration Guide Version 3.0



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## WELCOME TO QUEWEB CUSTOMER CARE

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Thank you for using QueWeb Customer Care, created by Queplix. The QueWeb Customer Care Open Source (OSS) Edition system is designed to help your organization efficiently manage relationships with customers and organize and maintain information which is crucial to all Customer Care aspects of your business. QueWeb software is a powerful blend of “best of breed” functionality and ability to accommodate 100% of specific business requirements, thus creating a unique and effective solution to address all your Customer Care needs.

QueWeb provides integrated management of corporate information, such as: Customer Accounts and Products management, capturing Interactions and creation of Tickets, Customer Portal and Knowledge Base. QueWeb enables various communication channels such as email, phone, CTI, and the Web. QueWeb will streamline existing workflows within your Customer Care organization, as well as allow creation of new and enhanced processes.

- The QueWeb system offers several reporting and analytical tools: built-in Ad-Hoc reporting module, Role-based dashboards and data export to Microsoft Office® programs.
- QueWeb offers seamless integration with any third party software and can connect to any corporate database. QueWeb can work with data from other systems natively, so that Users will have a 360-degree view of the customer without the need to switch to other systems.
- QueWeb offers the most robust security, scalability and high-availability in the Customer products, by utilizing the most advanced technical architecture.

Most importantly, QueWeb can effectively adapt to a set of requirements of any complexity, depending on the needs of your Customer Care organization. QueWeb can help your organization stand out from the competition by providing excellent Customer Experience and enable Customer Loyalty.

## ABOUT THIS GUIDE

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This Guide describes in detail administrative operation procedures in QueWeb Customer Care 3.0. It is designed for QueWeb System Administrators who possess a thorough knowledge of the business processes in the Customer Care Center, as well as sufficient understanding of basic system processes.

This Manual will guide you through the process of setting up QueWeb environment and enabling the system operation for the Users. It introduces step by step instructions on how to set up the system as well as how to customize and automate tasks.

Readers are not required to have any programming or software development knowledge, but should be generally familiar with the use of a personal computer and Internet browser software, such as Microsoft Internet Explorer© or Fire Fox©.

## **WHO SHOULD READ THIS GUIDE?**

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This manual's audience:

- QueWeb System Administrators (SA)

## **GETTING STARTED**

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This Guide assumes that the resources you need to access the system are available and that you are familiar with how to use them.

## **TECHNICAL REQUIREMENTS**

Before you begin using the system, ensure that you have the required software installed and configured on your system. You will require the following:

- A web browser installed on your computer.

QueWeb Customer Care 3.0 has been tested with and supports Mozilla Firefox 2.0 and Microsoft Internet Explorer version 6.0 and higher with any combination of the IE Service Packs released by Microsoft.

- Network access to a QueWeb Customer Care server.

Your system or network administrator can provide you with an Internet address (URL) from which the system can be accessed.

QueWeb is designed for a minimum 1024x768-pixel screen display resolution. Please also download and review the Minimum Hardware requirements document from the Queplix web site Download section (<http://www.queplix.com/download>).

## APPLICATION OVERVIEW

Most of the QueWeb modules are customized to the customer's specific business requirements. Most likely your system is also a custom implementation, therefore it is expected that the System Administrator will possess the knowledge about the business processes that are fulfilled by the QueWeb system. This document will describe standard Administration tasks performed in the QueWeb system.

Basic Out-Of-The-Box (OOB) QueWeb system allows agents to log tickets related to the specific problem or question. Customer could be defined as internal to the company (i.e. employee, other departments or groups of Users) or external (i.e. vendors, consultants, customers) depending on your specific business needs.

The task of the QueWeb System Administrator is to maintain the system processes, rules and data to enable and enforce the workflows within the application.

Administrators usually work in the Administration Focus of the system; however they typically have unrestricted access to all parts of the system. Other Users usually do not have access to the Administration Focus.

Depending on your tasks, you may need to set-up and maintain the following business entities in QueWeb:

- Employee Records and their Logins
- Customer Records
- Workgroups
- Field Audits
- System Settings
- Email Queue accounts and Routing rules for the incoming email
- Access permissions (Roles and Assignments)
- Notifications (Email Messages sent by the System when a record changes its status)
- Escalations (Email Messages sent but the System if a certain record remains at the same status for a set length of time)

## APPLICATION LOGIN

Before you can start working in the system you need to login – supply the credentials to identify yourself to the system. This is done with two purposes: one is the security; second purpose is to identify you to the system. There are many actions in the system that will be customized and directed specifically to you. The login screen requires supplying the login and password; QueWeb OOB will be installed OOB with a preconfigured *admin* User account with an empty password:



FIGURE 1 QUEWEB LOGIN SCREEN

## ACCESS SECURITY

Users in QueWeb system are distinguished by their Roles. Each User must be assigned at least one Role. This assignment might be indirect and be based on one or several Workgroups User belongs to. Depending on your Role within your organization or Business Process within this system you will gain access to certain areas of the system.

In addition, any User may have several Roles. In this case, the system will combine the permissions and create an effective set of permissions for your session. For more on User Roles and permissions please see Access Security chapter below.



### NOTE

Preconfigured admin User account will be created during the installation and will be included as member of System Administrators workgroup with System Administrators security role. That will make the Administration functions available.

## APPLICATION USER INTERFACE

Upon a successful authentication you will see the main system screen. If this is your first login, by default you will be placed in My QueWeb section of the application. From here you can navigate to any other areas of the system, available to you through your Role assignment, start a workflow execution or perform other Customer Care or Management tasks.



FIGURE 2 APPLICATION OBJECT HIERARCHY

QueWeb Customer Care is designed for various sizes Enterprises as well as many industries. As such, it relies on the common set of business objects, represented in Application Object Hierarchy. In order to better understand the hierarchy of objects used in QueWeb, please study the following diagram to the left.

Let's consider the top object: a Focus. QueWeb Application is in fact a collection of various Focuses. Each Focus represents a complete set of business processes corresponding to a unique business Role. In other words, any User can fully complete his or her most common tasks within a specific Focus. Access to Focuses is assigned by the System Administrator based on Roles.

QueWeb Customer Care Open Source edition contains the following focuses:

- My QueWeb
- Administration
- Management
- eService
- Solutions
- Log

My QueWeb is a special Focus which is used to combine all User-relevant information and is a good starting point for your daily tasks. It provides quick navigation ability to specific tasks available to your Role and displays all possible activities you can perform within all Focuses you have access to. My QueWeb also provides access to your personal account options as well as My Queue.

A Focus can contain SubFocuses, which in turn consist of multiple Tabs, Forms and field objects, controls and data elements.



## QUEWEB GRAPHICAL USER INTERFACE (GUI)

Let's look at the eService Focus, Interaction SubFocus, Interaction Tab as an example:

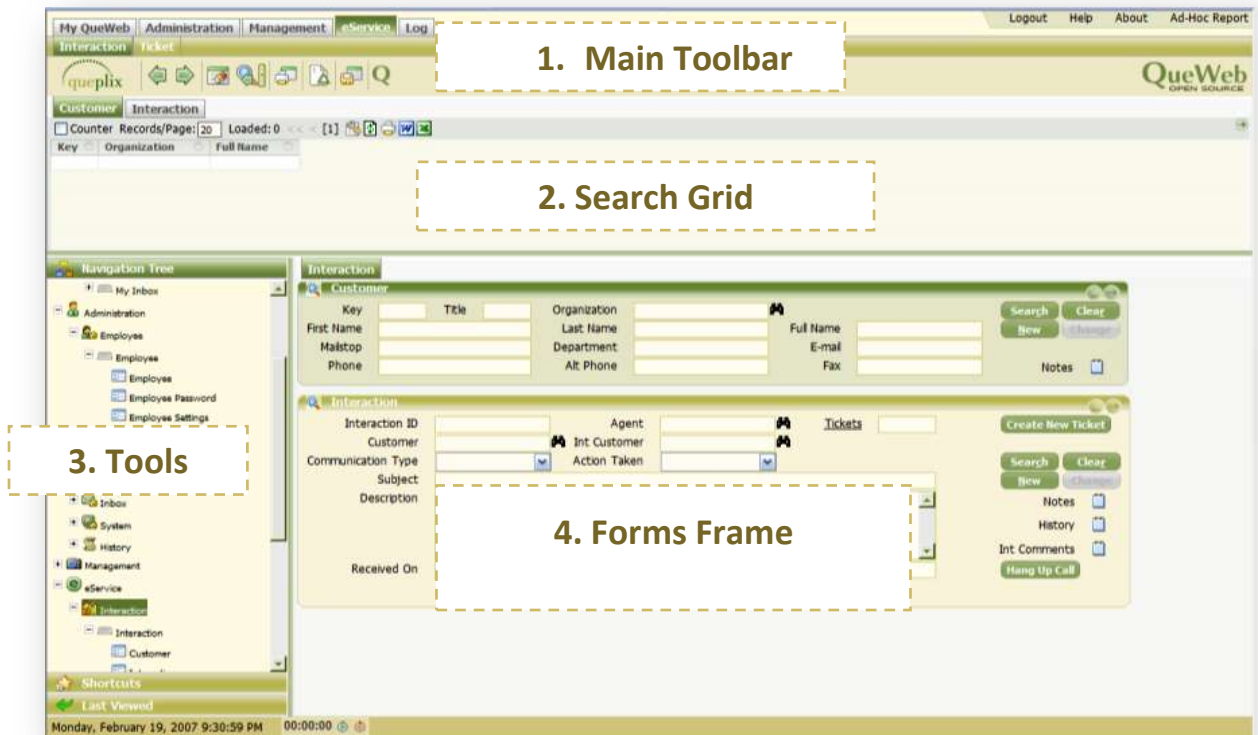


FIGURE 3 QUEWEB GUI FRAMES

QueWeb User Interface consists of four main frames:

1. Main Toolbar
2. Search Grid
3. Tools Frame
4. Forms Frame

You can resize frames by moving the splitters between them. Let's look at the four frames individually.

### MAIN TOOLBAR

Main toolbar consists of Focuses and SubFocuses navigational Menu, as well various buttons. Depending on your Role; availability of modules in your QueWeb or number of customizations you might see different Focuses and SubFocuses Menus.

Out of the box QueWeb Main toolbar:



FIGURE 4 MAIN TOOLBAR

Let's zoom in on the left side:

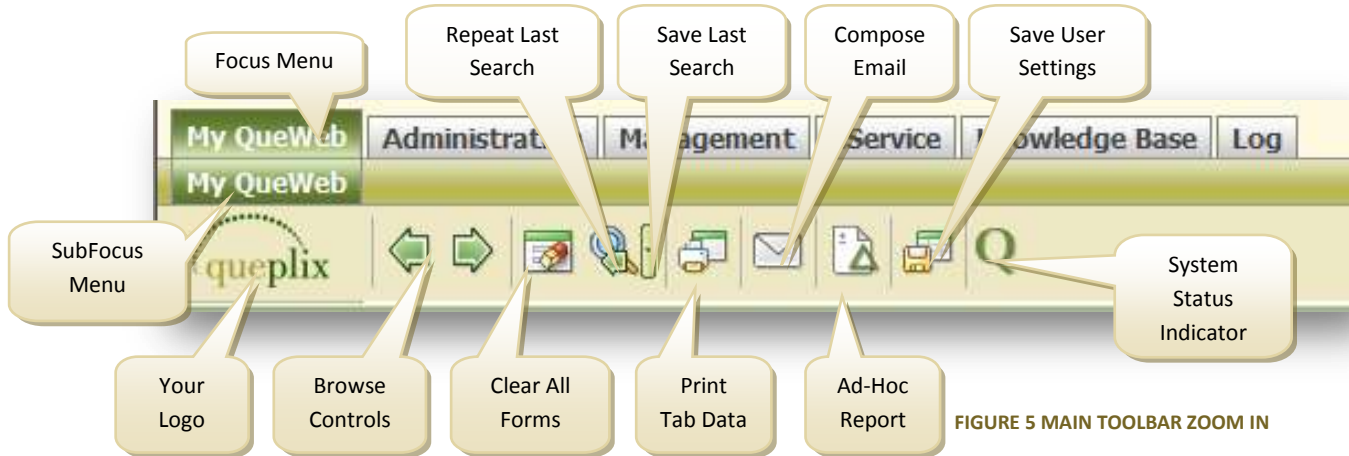





FIGURE 5 MAIN TOOLBAR ZOOM IN

System memorizes all objects you navigate to; by clicking on Browse Controls' Back and Forward buttons you can retrace your steps back and forward within the workflow. This is sometimes known as navigating the "bread crumbs trail". **Clear All** button used to quickly reset all information entered in all objects in the application. Clicking on the Last **Search** button you can recreate the last search performed by you, along with all search criteria. Furthermore, you can click the **Arrow** icon next to this button and have your last search saved or recall previously saved search. This is useful when you perform a repetitive search and using this function you can create a search template designated by a name you can remember. **Print Tab** will print the contents of the Form. **Compose Email** button will open a window in which you can create and send emails (you don't need to configure your email client or even have one installed in order to use email capabilities in QueWeb). **Ad Hoc Report** button will switch the system to the **reporting mode** allowing you to create and save Ad-Hoc reports and execute them. **Save Settings** will memorize all personal configuration changes in your current session and will load them next time you login (position and sizes of the notepad windows, number of records displayed in each Grid, etc). **System Status** Indicator will change to reflect current state of the system:

<b>Ready (System idle)</b>	
<b>Reading Data from Server</b>	
<b>Busy (No User Operations Possible)</b>	

Now let's zoom in on the right side:

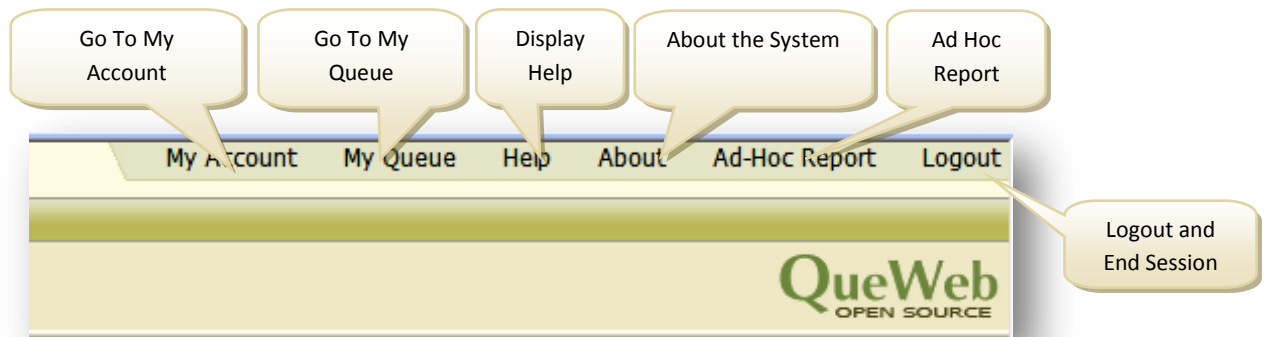


FIGURE 6 MAIN TOOLBAR ZOOM IN

## SEARCH GRID

Search Grid is used to display the results from searches performed in the Forms area. Every Form in QueWeb is represented by its own Search grid, which is a collection of columns:



FIGURE 7 SEARCH GRID

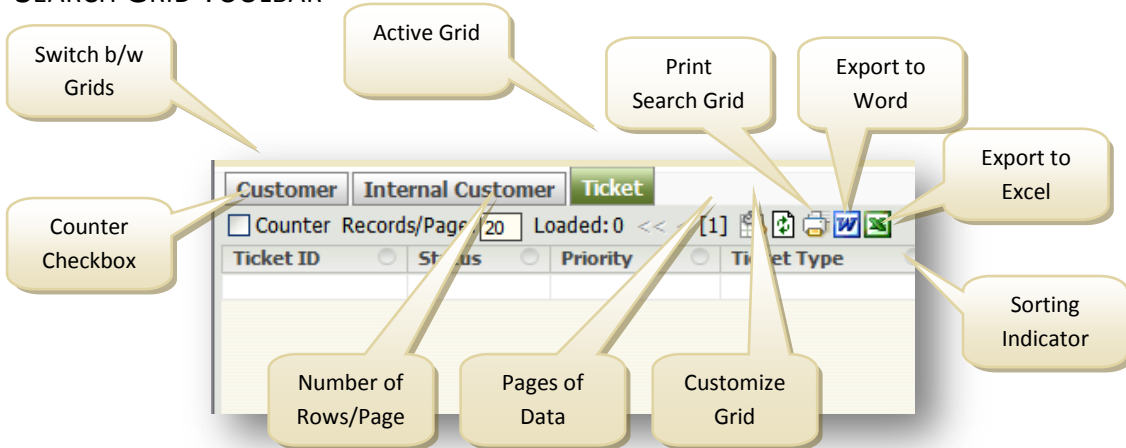
Any search within the given Form will always bring the results into the dedicated Search Grid. Because a Tab can contain several Forms, there are as many Grids on the screen as there are Forms. You can switch between Grids by clicking on their labels. The Grid will become active and visible automatically when the search is performed from its associated Form.

By positioning the mouse over the columns divider you can resize them, as well as double-clicking the dividers will auto-resize the column to the left based on the width of the widest cell. It is possible to sort the data displayed in the Grid by clicking on the column header. First click

will resize the data in the ascending order; second click in descending and third click will un-sort the column.

You can control how many records you can view inside the Grid for each Form at a time. If you would like to find out the total number of records in the Table on which the Form is based – click the Counter check box. QueWeb Grid is also equipped with the Records per Page control, which allows browsing the search results page by page or jumping to first or last pages. This is useful when the search results contain a large number of rows.

## SEARCH GRID TOOLBAR

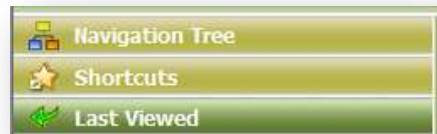


You can select rows in the Grid in order to perform certain functions on them by using the CTRL and SHIFT keys combinations with mouse or use a Record Select Control on the right of the Grid Toolbar to select all records or invert your current selection.

## TOOLS FRAME

Tools Frame consists of three tools:

- Navigation Tree
- Shortcuts
- Last Viewed Objects



You can switch between tools by clicking on the appropriate labels. **Navigation Tree** tool displays the hierarchical list of all objects you have access to within the system. It is similar to My QueWeb navigational frame, but it is always available in any screen. The Navigational tree will refresh when you navigate the system using any method: navigational tree, tabs on top or My QueWeb. **Shortcuts** tool displays additional menu items for the currently selected Form. Typical shortcuts could be: Delete, Local Search (perform a search without any external constraints), or for example in the Ticket Form: My

Queue, Open Tickets, etc. **Last Viewed** pane will keep track of all objects you select in the Search Grid.

## FORMS FRAME

Each Tab may consist of one or more Forms. Each Form represents one business Entity, for example: Ticket Form, Defect Form, and Product Form. Tabs sometimes can have the same names as Forms they contain. Form represents a table in QueWeb database. Each Form has a name, displayed as label in Form's upper left corner.





Form Example:



FIGURE 8 INTERACTION FORM

The business process and the sequence of objects for which the information is stored and retrieved define the layout of a Tab and Forms within it. Usual workflow in QueWeb assumes filling of the information from top to bottom; by positioning some Forms above the others, QueWeb system designers insure the correct and intuitive flow of information within each Tab.

Each Form has a title bar, which contains its label, Mode Indicator and Form controls. Form Mode Indicator represents one of the Form's current operating modes:

- Search (Clear) 
- Display (Filled) 
- New (Create a new Record) 
- Change (Changing existing Record) 

Form's controls allow User to minimize it or display Form's additional Menu (Shortcuts).

## STANDARD OPERATIONS IN FORMS

There are four Basic operations which Agents can perform in Forms:

- Search
- Clear Form
- New Record
- Change / Save

Each operation is represented by the corresponding Button. Note, that depending on the state of the form (see above) some standard buttons will behave differently (active/disabled).

Additionally, depending on your permissions, you can use Delete command. Deleting records can be accomplished by first performing a Search operation in the Form, highlighting the record or multiple records in the Grid and pressing DELETE on your keyboard or selecting Delete command in the Shortcuts panel.



## WORKING WITH EMPLOYEES

---

Employee SubFocus on the Administration focus is designed for System Administrators to create new Employee Users, edit various Employee User information and settings, and organize Employees into the Workgroups.

Every Employee record you create/modify on this SubFocus is also QueWeb application User; meaning provided appropriate permissions are set up every Employee can access the system.

The Employee SubFocus consists of 2 tabs: Employee and Workgroup.

### CREATE NEW OR MODIFY EXISTING EMPLOYEE USER

The Employee tab lets you enter and maintain employee records. You need to create an employee record for every employee in your organization so they can be assigned to workgroups and properly associated with such records as interactions, tickets and solutions.

The screenshot displays four stacked forms in a web application interface:

- Employee Form:** Contains fields for Key, User ID, Employee ID, First Name, Last Name, Full Name, Title, Department, E-mail, Location, Site, Building, Phone, Alt Phone, Fax, Webpage, Pager, Mailstop, Reach By (dropdown), and Organization. It also has a Manager field with a person icon and buttons for Search, Clear, New, Change, Notes, and Audit.
- Employee Password Form:** Contains fields for Full Name, User ID, New Password, and Confirm Password. It has Search, Clear, and Change buttons.
- Employee Settings Form:** Contains fields for Employee, Timezone, Date Pattern, Time Pattern, Language, and Date Position. It has Search, Clear, New, and Change buttons.
- Employee Address Form:** Contains fields for Address Type, Address, State, Phone, Employee, Address2, Zip, Fax, City, Country, and Other. It has Search, Clear, New, Change, and Notes buttons.

To create a new Employee User you need to click **New** button on the Employee form and fill in all relevant information:

- **User ID** field is the login name User will use to access the application
- **Employee ID** field is Employee identifier used in the Customer Care Center.
- **Organization** reference field can be used to link specific Employee record to Organization information.
- **Notes** field can be used to store any information about Employee that doesn't have corresponding field on the form

Use Employee Password form to change password for any existing Employee User. For that you will need to find Employee record you need using either full name or User id and then update the record by typing the same password twice in the **New Password** and **Confirm Password** fields.



**NOTE**

You can configure Organization records on the Management focus -> Customer SubFocus -> Organization tab.



**NOTE**

Newly created Employee User will have a blank password. So it is advised to reset User password right after User is created.

In the Employee Settings Form you can specify User-specific locale settings, i.e.:

- Date and time patterns User will see/use throughout the whole application
- Language
- User's location time zone so that system could display all date and time information in the correct time zone

The following table describes the date patterns can be set up for User account:

Format	Examples	Format	Examples
<b>d MMM yy</b>	4 Jan 96 24 Jan 96	<b>M/d/yyyy</b>	1/4/1996 12/24/1996
<b>d MMM yyyy</b>	4 Jan 1996 24 Jan 1996	<b>MM/dd/yy</b>	01/04/96 12/24/96
<b>dd MMM yy</b>	04 Jan 96 24 Jan 96	<b>MM/dd/yyyy</b>	01/04/1996 12/24/1996
<b>dd MMM yyyy</b>	04 Jan 1996 24 Jan 1996	<b>MMddyy</b>	010496 122496
<b>dd/MM/yy</b>	01/04/96 21/24/96	<b>MMddyyyy</b>	01041996 12241996
<b>ddMMMyy</b>	04Jan96 24Jan96	<b>MMM d, yyyy</b>	Jan 1, 1996 Jan 24, 1996
<b>ddMMMyyyy</b>	04Jan1996 24Jan1996	<b>MMMM d yy</b>	January 1 96 January 24 96
<b>dMMMyy</b>	4Jan96 24Jan96	<b>MMMM d yyyy</b>	January 4 1996 January 24 1996
<b>M/d/yy</b>	1/4/96 12/24/96	<b>MMMM dd yy</b>	January 04 96 January 24 96
		<b>MMMM dd yyyy</b>	January 04 1996 January 24 1996

Finally, using Employee Address form you can define address information for Employees. You can link as many address records for any Employee as needed.

## ORGANIZE EMPLOYEES INTO THE WORKGROUPS

You can recreate your Customer Care Center organizational structure on the Workgroup tab of the Employee SubFocus.



The screenshot shows two forms in a web application. The top form is titled 'Workgroup' and has fields for 'Key', 'Name', 'Description', 'Notify Method' (a dropdown menu), and 'Notify Address'. It includes 'Search', 'Clear', 'New', and 'Change' buttons. The bottom form is titled 'Workgroup Member' and has fields for 'Employee', 'Workgroup', 'Tier', and 'Notify Method' (a dropdown menu). It also includes 'Search', 'Clear', 'New', and 'Change' buttons. Both forms have a magnifying glass icon in the top left corner.

Here, you can link Employee records to any Workgroup. An Employee can be a member of several Workgroups at the same time. Besides reflecting corporate organizational structure Workgroups can also be used to define application security, participate in routing and notification rules and can be assigned to application objects like Tickets to indicate the responsible Workgroup.

In order to create a new Workgroup you need to create a new record in the Workgroup form by defining its **Name** and optionally a **Description**. Use **Notify Method** field to indicate the preferred transport for delivering application notifications. Choices are;

- **Alert** – the notifications will be sent as QueWeb Application web message. Individual Users will find them in the My Queue screen. Only one notification will be sent to the Workgroup, all members of Workgroup will see the same information on the
- **Email** – the notification will be sent as Internet E-Mail messages to the address specified in the Notify Address field on the Workgroup.
- **Owners** – notifications will be sent separately to individual members of the Workgroup. The transport will be determined by the Notify Method field value of the corresponding Workgroup Member record.

To link Employee and Workgroup records you need to use Workgroup Member form. To do this you need to select relevant Employee and Workgroup records in the corresponding reference fields. Use **Tier** field to indicate the position of Employee in the Workgroup (e.g. All managers can be included into the Workgroup as tier 1 and all other agents as tier 0). **Notify Method** specifies how notifications will be delivered to Employee once notification is sent to corresponding Workgroup which is configured with *Owners* value in the **Notify Method** field.



**HINT**

If list of Employees or Workgroups is too big to find the target record with the reference control then you can search on the corresponding forms of the SubFocus. Once record is selected into the form the corresponding fields on the Workgroup Member form will be auto populated with selected values.

## SECURITY ARCHITECTURE DEFINITION

The following terms form a security model in QueWeb 3.0

1. Permissions – define QueWeb objects’ access rights and other privileges.

There are two types of Permissions: Object Access Right permissions and Application Specific functional permissions.

2. Object Access Right permissions can be applied to the following QueWeb objects:

- Focuses
- Sub-Focuses
- Tabs
- Forms

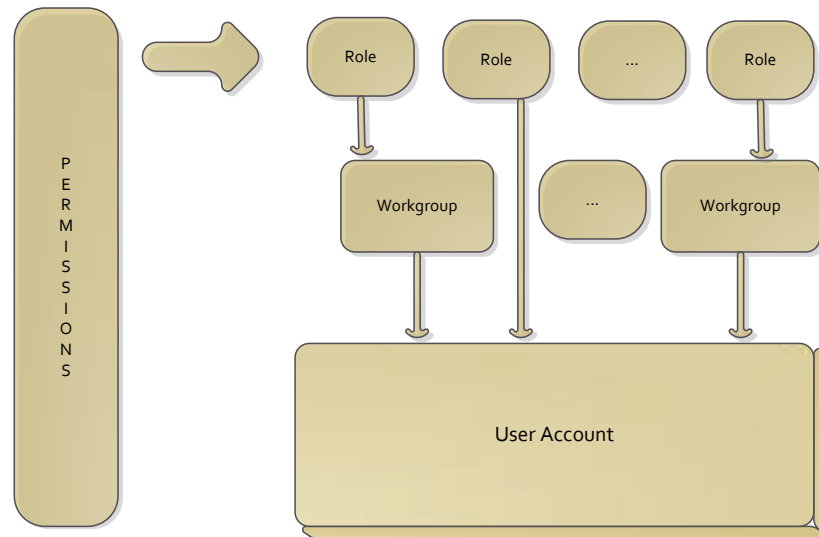
3. The following objects can be granted Permissions:

- Security Role – specifies the business domain of the Users. Examples are: Call Takers, Email Handlers, Email Administrators, QueWeb System Administrators. Basically, Security Role is defined as a set or collection of Permissions which combines Access Rights and GUI elements on a set that can be assigned to Workgroups or individuals.

Security Roles can be further assigned to:

- User accounts – individual Users’ accounts that can access QueWeb. All employee and customer Users should have a QueWeb account in order to access the system.
- Workgroups – used for grouping individual Users.

The following diagram shows relationships between all objects in the QueWeb's security architecture:



Permissions are assigned to Roles. Roles can be assigned to Workgroups (recommended) or to individual User accounts (in rare cases). Individual User accounts can be organized into Workgroups.

If a User belongs to several Workgroups or has several Roles assigned to his/her individual User account, the system will combine the effective permissions from all Roles, Workgroups and individual account permissions into a single set of Permissions. In this set the “allow” will take prevalence over “deny”. This effective set of permissions will be used ONLY for the current session; at each login the set of permissions will be created for the duration of each session. If User's permissions change at any level (Role, WG or Account) the User will have to logout and log back in to allow the system to generate a new set of active Permissions.

In order to determine User's Rights during the login process the QueWeb System creates a set of active permissions for the session. In order to create this set it first combines all Permissions for each Object level (Roles and Workgroup levels) that are linked to an individual account and after that will narrow down Permissions from Roles level to the Account level so that Permissions on the level closer to Account will override those above.

In order to make complex security architecture easily manageable in QueWeb there is no option to explicitly deny permissions for the objects. If the Permission is not defined for security object (Role, WG or Account) – a default state – it means that the corresponding permission is denied. So if, for example, an individual User must be denied access to a Form while other Users in his/her Workgroup must have access – in order to accomplish this you must remove the User from a current Workgroup, create a new Role and explicitly assign the User to this Role.

The best practices procedure is to create security Access Rights in terms of Roles and defining them on a per-User activity basis. E.g. Call Takers Role, Email Handlers, Email Administrators.

The goal for Security Administrator should be creating Roles for a specific set of User activities and avoiding overlaps between such activities as much as possible.

Several Roles can be assigned to workgroups or individual accounts and this will allow even more flexible management of access to different modules of the application. Such approach allows building solid and comprehensive access control list where Users are assigned to Permissions through Roles and such Roles are created based on business needs and typical User responsibilities.

All available Permissions can be divided into two categories:

1. Access Rights – define access permissions for QueWeb UI objects: Focuses, Sub-focuses, Tabs and Forms.
2. Functional Permissions – define what actions in the application Users are allowed to do. E.g. assign cases, become owners of the cases, approve change requests, etc.

## ACCESS RIGHTS PERMISSIONS

Access Rights can be applied to Focuses, Sub-focuses, Tabs and Forms.

If case when the higher level object is being assigned to the entity (Role, WG or Employee) all its underlying objects (SubFocuses, Tabs and Forms) will be automatically added by the system with the same Access Rights as the Focus. For example, if an Administration Focus is assigned to the Administrator Role in Read-Only capacity, then all Admin Focus' SubFocuses, Tabs and Forms will be assigned automatically with the Read-Only Rights also. However, explicitly creating a set of Access Rights for of the underlying objects will overwrite the higher object permissions for the underlying Object. For example, Admin Focus Full Control Access Right is given to the User Role System Admin Tier 2. At this point, all Users in this Role will have Full Control rights to ALL objects in Admin focus. Then the Access Right is added for the History Tab with access of READ ONLY. In this case, the Admin Tier 2 Users will have only READ access to the History Tab. If such rights contradict each other due to a mistake made in the Rights assignment or through conflicting assignments from several Roles – the higher access Right will prevail, meaning that READ ONLY will prevail over NONE. Higher Access Right means the less restricted Right.

The following Access Rights for QueWeb UI objects are available out of the box:

- *Not Specified* – if permission for some underlying form is not specified then the form will not be visible (no access is granted).
- *Read* – underlying form is visible for the User and User can search/view records via this form (Using Search and Clear buttons but not the NEW and Update). NOTE: This does not propagate to the non-standard buttons that you might create. Please consult with the QueWeb Development Guide to make sure your custom buttons are in synch with User Rights and are included in the Security procedure; meaning that the custom

buttons are disabled or enabled corresponding with the User's effective set of Access Rights.

- *Write* – underlying form is visible and a User can create new or modify existing records via this form; delete is not permitted.
- *Owner* – underlying form is visible and User can create new or modify existing records. User can delete only records created by him/her.
- *Full Control* – underlying form is visible and User can do any operations with the records via the form, including delete operation. NOTE: In some cases the system will prevent Users from deleting certain records, for example if the record being deleted has a linked child records.

An effective list of access rights is dynamic and managed by the System Administrator. The list can be changed at any time either by changing effective Rights Assignments or creating new objects and setting their Permissions.

## FUNCTIONAL PERMISSIONS

This category of permissions describes what Users are allowed to do in the application. This is a predefined set of permissions and specific business logic checks for such permissions before performing functional actions. An example can be "Ticket Resolvers" Permission: only Users with this Permission can become Owners of the Ticket.

Since custom business logic will usually utilize such permissions, out of the box application doesn't have any functional permission defined.

## MANAGING SECURITY

You can manage Security Assignments using the Security SubFocus of the Administration Focus. It consists of two tabs: Accounts and Permissions.

On the Accounts tab you can link Security Roles to individual Employees or Workgroups.

The screenshot shows the 'Accounts' tab with the 'Permissions' sub-tab selected. It contains four search forms:

- User:** Fields for Key, Full Name, User Id, and E-Mail. Buttons for Search and Clear.
- User Roles:** Fields for User and Role. Buttons for Search, Clear, New, and Change.
- Workgroup:** Fields for Key, Name, and Description. Buttons for Search and Clear.
- Workgroup Roles:** Fields for Workgroup and Role. Buttons for Search, Clear, New, and Change.

You can utilize either a User or Workgroup Forms to search for the individual User or workgroup you want to assign Security Role to. Create a new record in the User Roles or Workgroup Roles, and then link this Role to a User or Workgroup to create an Assignment. It is recommended to use the Workgroup Roles and assign Employees into Workgroups; this will allow for better visibility and improve manageability of Security Assignments. Use Employee to Role Assignments only if there is only a single Employee who needs to be granted a certain Role and using Workgroup Assignments appears not feasible.

Use Permissions tab to create new and manage existing Security Roles:

The screenshot shows the 'Accounts' tab with the 'Permissions' sub-tab selected. It contains two search forms:

- Security Roles:** Fields for Key, Role Name, and Description. A 'Default Focus' dropdown menu. Buttons for Search, Clear, New, and Change.
- Access Rights:** Fields for Object Type, Object Name, Access Level, and Role. Buttons for Search, Clear, New, and Change.

Another attribute of Security Role object is the **Default Focus**. Use this drop down field to specify the focus name to be displayed when User logs in. If **Default Focus** is not specified then My QueWeb screen will be displayed to the User by default when he or she logs into the

application. If a User has several Security Roles assigned and thus several default Focuses, then **Default Focus** attribute of the Security Role with the smallest **Key** will take prevalence.

In order to define Security Role and assign Access Rights to it, you will need to use Access Rights Form. While creating a new record, select the **Object Type** you want to assign Access Rights to. Having a value in the **Object Type** field will constraint the list of possible values in the **Object Name** field. Select the appropriate value in the **Object Name** reference field. Proceed to selecting the desired **Access Level** value from the dropdown. And make sure that **Role** reference field points to Security Role object you defined or selected in the previous step.

## EMAIL QUEUE ADMINISTRATION

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In the Email Queue SubFocus of the Administration focus you can manage various properties of the QueWeb E-Mail subsystem. Here you can configure e-mail accounts on the external mail servers, specify anti-spam filters and e-mail routing rules.

### ADMINISTERING EMAIL SERVER ACCOUNTS

On the Account tab you can create and modify e-mail server accounts.



Based on the predefined schedule (see QTask chapter in this Guide for more details) QueWeb will be checking these e-mail Accounts and downloading new e-mail messages delivered to these Accounts. Based on preconfigured Routing Rules the e-mail messages will be routed to a specific Workgroup or Employees and new Interactions and Tickets will be created.

QueWeb supports two types of e-mail servers: POP3 and IMAP4. You can specify the one you need for a given Account in the **Protocol** field of the form. Based on selected **Protocol**, you will also need to specify **Port**. For POP3 default is 110, for IMAP4 it is 143. Other properties available are:

- **Server** – DNS name or IP Address of the e-mail server. Make sure that the name is accessible via TCP/IP transport from the QueWeb server. You can [check](#) the Account validity after it is created.
- **Folder** – this field is required for IMAP4 accounts. It specifies the IMAP4 folder name where new messages will be looked for. Typically it is defined as *Inbox*.
- **Login Name and Password** – specify the login credentials to connect to the server.
- **Max Email Size** – E-mail size in KB limit. Messages bigger than value in this field will be ignored by Email Queue processing.
- **Date Received** – read only field, auto refreshed by the system when the Account's email is read. The system keeps the timestamp information of the last processed message. This timestamp is used in the next Account reading cycle in order to avoid downloading duplicate emails.
- **Valid** – the checkbox becomes enabled when the Account settings are valid, e.g. if the Email Queue process can successfully login into the server with specified credentials. Read-only field, it is updated when Check Account button is clicked.
- **Active** – use this field to quickly remove or add account to the e-mail processing cycle. Non active accounts are not monitored.
- **Next Check Date** – displays timestamp information of the start of the next reading cycle for the Account.
- **Keep Incoming Email as Unread** – applies to IMAP4 servers only. If checkbox is *enabled* then all processed e-mail messages will show as *unread* on the e-mail server. By default they will be displayed as *read*.
- **Keep Outgoing Email as Unread** - works for IMAP4 servers only. If this checkbox is *enabled* then all sent e-mail messages will be displayed as *unread* on the e-mail server. By default they will be displayed as *read*.
- **Delay** – specifies how often the Account needs to be polled for the new email.
- **Delete Email** – enable this checkbox if you want to remove e-mail messages from the server once they were processed. Note: if this option is enabled you will not be able to receive emails in other mail clients such as Outlook.
- **Effective Junk Filters** – keeps list of Junk Filters that are applied to messages downloaded from this e-mail Account.
- **Effective Routing Rules** – keeps list of all Routing Rules that are applied to messages downloaded from this e-mail Account.



- **Default Routing Owner** – specifies the User account who will receive notification in the My Queue screen when none of the **Effective Routing Rules** evaluate to true.
- **Default Routing Workgroup** – specifies the Workgroup that will receive notifications when none of the **Effective Routing Rules** evaluate to true.

## CONFIGURING JUNK FILTERS

Junk Filters are created in order to filter unwanted email based on the keywords and delete them. You can create and configure Junk Filters on the Filters tab of the Email Queue administration screen.

The screenshot shows the 'Filters' configuration window. At the top, there are three tabs: 'Account', 'Filters', and 'Routing Rules'. The 'Filters' tab is selected. Below the tabs, there is a search bar with 'Key' and 'Name' labels and input fields. To the right of the search bar are buttons for 'Search', 'Clear', 'New', and 'Change'. Below the search bar is a 'Filter on Keyword' input field. Underneath is the 'Apply Filter to' section, which includes checkboxes for 'From Address', 'Subject', 'To Address', and 'Body'. At the bottom, there are fields for 'Created By' and 'Created Date'.

After you configure the Filter you need to link it to a specific E-Mail Account via **Effective Junk Filters** field. After that the application will apply Filter to every new message and if successful will discard the email.

You can configure a Filter in terms of an object and a keyword. Application will evaluate filter to **true** if the keyword is found in the E-Mail message attribute. E.g. if the filter is:

*Apply Filter to To: Address and keyword is [noreply@queplix.com](mailto:noreply@queplix.com)*

and the e-mail message being processed has [noreply@queplix.com](mailto:noreply@queplix.com) address in the list of recipients - the message will be discarded. The Filters are applied before the Routing Rules being processed.

## CONFIGURING E-MAIL ROUTING RULES

E-Mail Routing Rules are used to identify the agent and/or workgroup that will be responsible for handling the new Customer enquiry. You can manage the E-Mail Routing Rules on the Routing Rules tab of the E-Mail Queue administration window.

**Owner** and **Workgroup** reference fields indicate which Agent or Workgroup will be responsible for handling the Customer enquiry. Use **Route on Keyword** field to specify the keyword that application will be looking for while applying the rule. **Apply Filter to** section identifies where the system is checking incoming e-mail message for the Filter **Keyword(s)**. You can define the multiple Keywords and check several email properties to check for its presence.

An example of a Routing Rule:

*Route incoming e-mail to 'Ticket Resolvers' workgroup if 'support@' keyword is found in the To Address.*

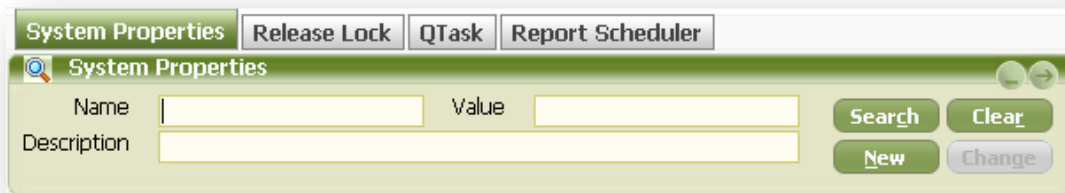
After you set up the Routing Rule you need to add it to the list of **Effective Routing Rules** of the E-Mail Account. After that application will evaluate all effective Routing Rules one by one for each incoming e-mail message received from the mail server. If a Routing Rule evaluates to **TRUE** then a new Queue record will appear in all Workgroup members of Workgroup the message was routed to. In case **Workgroup** was not specified for the Routing Rule but the **Owner** was - then only the target **Agent** will receive the message on the My Queue screen.

For each incoming e-mail that was routed to an Agent or Workgroup, the system will generate an incoming Interaction and Ticket with corresponding Owner, Agent and Workgroup values as defined in the Routing Rule. In case none of the effective routing rules were successfully applied for the incoming message then **Default Routing Owner** and **Default Routing Workgroup** fields of the Account object will be used. In this case only Interaction object will be created by the application without corresponding Ticket object. After that, a designated person (either specified in the **Default Routing Owner** or a member of Workgroup specified in the **Default Routing Workgroup** field) can review Queue messages and/or Interactions and create Ticket manually if necessary.

In case no routing rule was applied and default routing owner and workgroup are empty for e-mail account then application will check IN\_EMAIL\_DEFAULT\_CUSTOMER\_ID System Property value and will try to link new Interaction to the corresponding Customer contact. If either System Property is not set or Customer contact doesn't exist then incoming e-mail message will be discarded. For that reason it is recommended to always specify default routing values.

## SYSTEM PROPERTIES

You can fine-tune the application and control various application functional behavior features using the System Properties tab of the System SubFocus on the Administration screen.



The list of all standard System Properties and their meanings are explained in the following table:

System Property Name	Default Value	Description
AdminId	0	ID field value of the System Administrator User. When application needs to do some processing on behalf of Administrator it will look for User with ID specified in the property
DB_APP_VERSION	n/a	Stores version of the QueWeb OSS database. Should never be modified by User.
DB_CORE_VERSION	n/a	Stores version of the QueWeb Core database. Should never be modified by User.
DEFAULT_EMAIL_FOLDER	Inbox	Used in the E-Mail module. Default value for the Account Inbox field; used with IMAP4 servers only.
DEFAULT_EMAIL_PORT	110	Used in the E-Mail module. Default port number when new e-mail Account record is created.
DEFAULT_EMAIL_PROVIDER	IMAP	Used in the E-Mail module. Default email service provider when new e-mail Account record is created.
DEFAULT_EMAIL_SERVER	n/a	Used in the E-Mail module. Default e-mail server value when new e-mail Account record is created.
DEFAULT_MAILER	Queplox	Default mailer(X-Mailer) e-mail message header value

System Property Name	Default Value	Description
DEFAULT_SENDER	default@ sender.com	Used in the E-Mail module. When a User replies to the e-mail using REPLY button or compose email button and User's e-mail cannot be determined by the system then the value specified in this Property will be used as a return address.
IN_EMAIL_DEFAULT_CUSTOMER_ID	-1000	Used in the E-Mail module. If incoming e-mail processing module for any reason could not find an existing customer or create a new one then Interaction and/or Ticket objects will be linked to a default Customer record specified in this property. A default Customer record with -1000 ID (negative number) is created when the Application is installed with QueWeb Installer.
IN_EMAIL_DEFAULT_CUSTOMER_NAME		Used in the E-Mail module.  Used while creating a new Customer when Customer name cannot be retrieved from the e-mail message.
IN_EMAIL_INTER_DEFAULT_AGENT	-1000	Used in the E-Mail module. Agent field of the Interaction object will point to Employee ID record identified by this System Property. A default Agent record with -1000 ID (negative number) is created when the Application is installed with QueWeb Installer.
IN_EMAIL_INTER_SOURCE	3	Used in the E-Mail module. Stores id of the Communication Type drop down value for Interaction created from the incoming emails. Default value 3 corresponds to Incoming Email.
IN_EMAIL_TICKET_AGENT	0	Used in the E-Mail module. Agent field of the Ticket object will point to Employee record identified by this System Property.

System Property Name	Default Value	Description
IN_EMAIL_TICKET_RVERSION	-1000	Used in the E-Mail module. Stores ID of the Reported In Build reference field value of the Ticket object. Used when new Ticket is created from the incoming e-mail. A default Reported in Build record with -1000 (negative number) ID is created when the Application is installed with QueWeb Installer.
IN_EMAIL_TICKET_IMPACT	1	Used in the E-Mail module. Stores ID of the Impact drop down field value of the Ticket object. Used when new Ticket is created from the incoming e-mail. Default value 1 corresponds to System Down value.
IN_EMAIL_TICKET_OWNER	1	Used in the E-Mail module. If no Routing Rule was applicable for the incoming e-mail and Account object doesn't have default routing Owner or Workgroup then the Ticket will be routed to Employee User ID specified in this System Property.
IN_EMAIL_TICKET_PRIORITY	1	Used in the E-Mail module. Stores ID of the Priority drop down field value of the Ticket object. Used when new Ticket is created from the incoming e-mail. Default value 1 corresponds to Serious value.
IN_EMAIL_TICKET_PRODUCT	-1000	Used in the E-Mail module. Stores ID of the Product reference field value of the Ticket object. Used when new Ticket is created from the incoming e-mail. A default Product record with ID -1000 (negative number) ID is created when the Application is installed with QueWeb Installer.
IN_EMAIL_TICKET_SOURCE	1	Used in the E-Mail module.  Default Origin field value for Tickets created from the incoming e-mail. Default value 1 corresponds to Email.

System Property Name	Default Value	Description
IN_EMAIL_TICKET_STATUS	1	Used in the E-Mail module. Default Status field value for Tickets created from the incoming e-mail. Default value 1 corresponds to New.
IN_EMAIL_TICKET_TYPE	1	Used in the E-Mail module. Default Ticket Type field value for Tickets created from the incoming e-mail. Default value 1 corresponds to BUG.
OUT_EMAIL_INTER_SOURCE	4	Used in the E-Mail module. When e-mail is sent as a reply to customer's enquiry and Interaction is created then the value of Communication Type field will be set to the value of this System Property. Default 4 corresponds to Outgoing Email.
SMTP_SERVER	mail.queplix.com	Stores SMTP server name where all outgoing e-mail messages will be sent to.
FILE_STORAGE	/tmp/upload	File path on the application server where attachment files will be stored. If the path specified is not found the system will produce an error message.
LockTimeout	600	Timeout period in seconds. Indicates how long the lock in database should be honored by other update-type transactions after User clicks Change button on the form.
REPORT_ZIP_DIR	/tmp/dir	Specifies local server file system path where the temporary files required for reports processing are created.
ReporterId	1	Stores ID field of the Employee record. Used by the application when it needs to do some processing on behalf of the system.

System Property Name	Default Value	Description
SESSION_TIMEOUT	720	User web logon session timeout value in seconds. If User is inactive longer than value specified in this property then User's QueWeb session will be disconnected automatically.
SESSION_TIMEOUT_WARN_BEFORE	3	If the value is positive integer, a warning will be displayed at the specified number of minutes before User QueWeb session times out.

## MANAGING USER DATABASE LOCKS

Whenever User clicks Change button on any form in the application the corresponding record becomes locked and it is exclusively available for changes for the current User only. Other Users will be able to see the record but will not be able to modify it until the locking User either saves the changes or discards them by clicking Clear button on the form or Clear All button. If it takes too long for a User to modify the record and save the changes then the User lock may expire automatically. It happens after 10 minute timeout and can be controlled application-wide via [LockTimeout](#) System Property.

However, there is a chance that User clicked Change button and acquired the exclusive record lock and after that either left the workstation or her internet connection was lost. In these cases other Users (or same User after reboot) have to wait for the lock to expire. On the Release Lock Form the System Administrator can find any current record locks and release them manually if needed.

The screenshot shows a web application interface with a tabbed menu at the top containing 'System Properties', 'Release Lock', 'QTask', and 'Report Scheduler'. The 'Release Lock' tab is selected. Below the tabs is a form titled 'Release Lock' with a search icon on the left and window control buttons on the right. The form contains several input fields: 'Table Name' with 'User' entered below it, 'Record ID', 'Focus Id', 'Created', and 'Pkey'. There are also 'Search', 'Clear', and 'Release Lock' buttons.

## SETTING UP JOBS FOR SCHEDULED EXECUTION

The QTask module allows scheduling and running any kind of Scripts or Jobs externally to QueWeb (in a separate process) while monitoring their execution, passing variables to them and logging the results in the application. A Script can be defined as the Java-based business action by the following information: script short name, description and parameters. Some default Scripts are installed during the QueWeb installation procedure.

The screenshot displays the QTask configuration window with two main sections: 'Scripts' and 'Tasks'.

**Scripts Form:**

- Key:
- Name:
- Description:
- Class:
- Creator:
- Modified:
- Buttons: Search, Clear, New, Change

**Tasks Form:**

- Task ID:
- Status:
- First Start:
- Repeat:
- Delay:
- Creator:
- Name:
- Script:
- Next Start:
- Auto Start:
- Unit:
- Created:
- Buttons: Search, Clear, New, Change, Start Task, Stop Task

Scripts Form defines the Scripts available in the system. Each installed script has the following properties:

- **Name** - short name of the Script
- **Description** - Description of the Script, typically describes the Script's action
- **Class** - Java class name implementing the business action the Script is based on
- **Creator** - creator of the Script, populated automatically
- **Modified** - Last modified date, populated automatically

Tasks Form defines the schedule for running the Scripts. Each Task has the following properties:

- **Name** - short name of the Task
- **Script** – reference to Script the Task is based on
- **Status** - status of the Task. This field is read only and is automatically updated upon events. See below the definition of various Task statuses
- **First Start** - the first scheduled time/date to start the Script
- **Next Start** - if the Task is repeatable, the time/date of the next Script start. Is automatically populated by the system.
- **Repeat** - check this box if you want the Task to be repeatable
- **Auto start** - auto start the Script on application startup (once the scheduler is started)
- **Delay** - the delay between the Task executions if the Task is repeatable



- **Unit** - units of the delay value, can be Minutes, Hours, Days or Months
- **Creator** - the creator of the Task, populated automatically
- **Created** -date when the Task was created.

After the Task is created its **Status** becomes *New*. In order to schedule the task for execution you need to click Start Script button. After that **Status** changes to Ready. Another way to schedule a new Task for execution is to mark it as **Auto Start**; after the next application restart Task will automatically be scheduled for execution. Task changes its **Status** to *Running* when the script is executing. **Status** *Waiting* indicates that the Task is repeatable and the Script was executed at least ones and is scheduled for the execution again. *Completed* when the task was stopped (User clicked Stop Task button) during the Waiting phase or it is not a repeatable Task and was successfully executed once. **Status** changes to *Interrupted* when the Script was stopped during execution or when some internal application error occurred and Task execution cannot continue.

## WORKING WITH REPORT SCHEDULER

This module allows User to define Reports for the scheduled execution and delivery of the report's results to the User's email account. Users define which Reports and how often (**Delay Period** and **Unit**) should be sent by the system. Users can define the recipient's address and subject of the report data in e-mail.

Each User can schedule and review only their reports on the My Reports tab of the My QueWeb window. At the same time, the System Administrator can set up a Report delivery or review scheduled Reports for all Users of the application on the Report Scheduler tab of the System Administration screen.

The screenshot shows a web-based form for scheduling reports. At the top, there are tabs for 'System Properties', 'Release Lock', 'QTask', and 'Report Scheduler'. The 'Report Scheduler' tab is active. Below the tabs is a search bar with a magnifying glass icon and a 'Reports' title. The form fields are arranged in two columns. The left column contains: ID (text input), Period (text input), Next Date (text input with a calendar icon), To Address (text input), CC Address (text input), and Subject (text input). The right column contains: Report (text input with a help icon), Period Unit (dropdown menu), Created By (text input with a help icon), and an 'Active' checkbox. On the far right, there are buttons for 'Search', 'Clear', 'New', and 'Change'.

In order to use this Module a Task for 'Send reports' script should be created in QTask tab of the System Administration screen. The system scheduler (QTask) should also be running.

These are the fields of the Reports Scheduler Form:

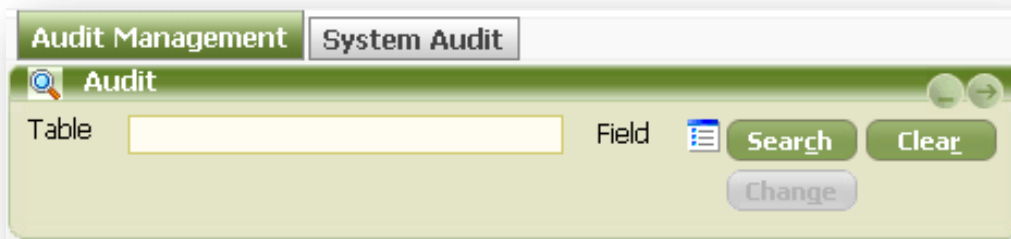
- **ID** – this field is filled automatically by the System (read-only);
- **Report** – allows choosing a Report Template from a popup window. Use Ad-Hoc Report Designer module to create new Report Templates.
- **Period, Period Unit** – these fields define the frequency of Report’s execution. For example, Period: 1, Period Unit: Minute; or Period: 2, Period Unit: Hour will generate and send a Report each minute in the first case, and each 2 hours in the second case.
- **Next Date** - date when the report will be generated and sent.
- **Created By** - in this field a User who created the report will be displayed.
- **To Address** - an e-mail address to which generated report will be sent. You can specify multiple addresses by separating them a semicolon.
- **CC Address** – an e-mail address for a copy of the report.
- **Subject** - a subject of an e-mail with the report.

## SETTING UP RECORDS AUDIT

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QueWeb application allows tracking any field’s changes within a particular table.

To configure what fields and in what tables will be audited each of auditable tables has a list of fields, available for selection by clicking on the multi-toggle control labeled Field on the Audit Management tab of System Administration screen.



Audit will be tracked for each field specified in the Audit Form. Users can view the Audit information in the Notepad fields labeled Audit placed in the corresponding Forms. Audit is identified by the timestamp of the change, as well as the User information who made the change. The actual change to Audit fields within a single transaction (once User clicked Update button) is recorded by noting the old value and new, changed value next to it in a formatted text table.

In addition to being able to review the Audit information on the particular Forms of the application (e.g. Ticket) Administrator has an ability to review specific Audit information for all records throughout the system. This can be done on the System Audit tab of the Audit Management screen.



## CONTACT QUEPLIX

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