



QueWeb Customer Care Open Source Edition

User Guide Version 3.0

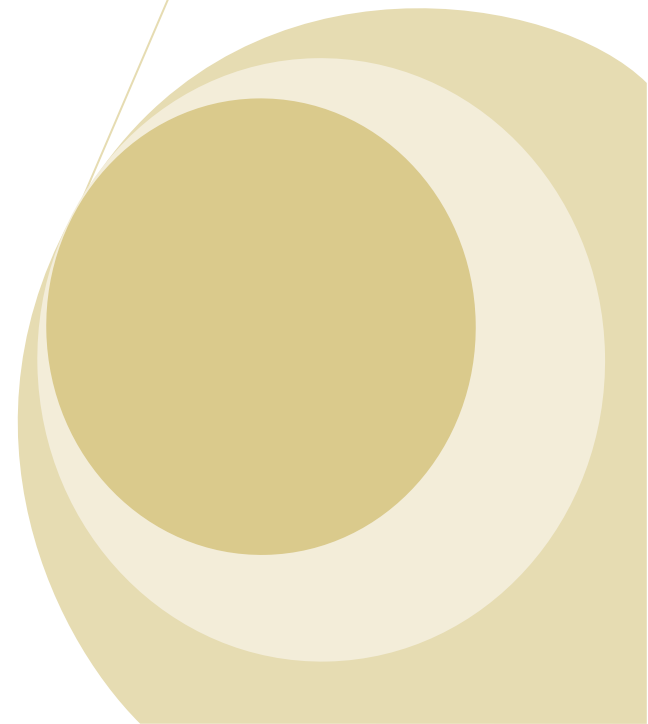


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WELCOME TO QUEWEB CUSTOMER CARE

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

This Guide describes in detail operation procedures in QueWeb Customer Care 3.0. It is designed for users who are at the “beginner” level of QueWeb, but also not thoroughly familiar with Customer Relationship Management solutions or web-based applications in general.

The information in this Guide describes how to use a personal computer and a web browser to access QueWeb to perform a broad range of Customer Care activities.

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?

QueWeb Customer Care Open Source Edition Guide provides information primarily for users who are actively engaged in daily Customer Care activities and tasks. This manual will guide users through basic QueWeb workflows, as well as advanced features.

GETTING STARTED

This Guide assumes that the resources you need to access the system are available and that you are familiar with how to use them. If you are not sure whether your system meets the requirements or how to use required third-party tools, such as a web browser, talk to your manager or system administrator.

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.

LOGIN PROCESS

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; you should have received these from your system administrator:



NOTE

Depending on your personal configuration, some Internet browsers can save the passwords you enter. This helps users remember their passwords. Please use features according to your company's policy. If you are not sure if your corporate policy will allow use of this feature please consult with your system Administrator.

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 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 Employee 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.

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.

MY QUEWEB FOCUS

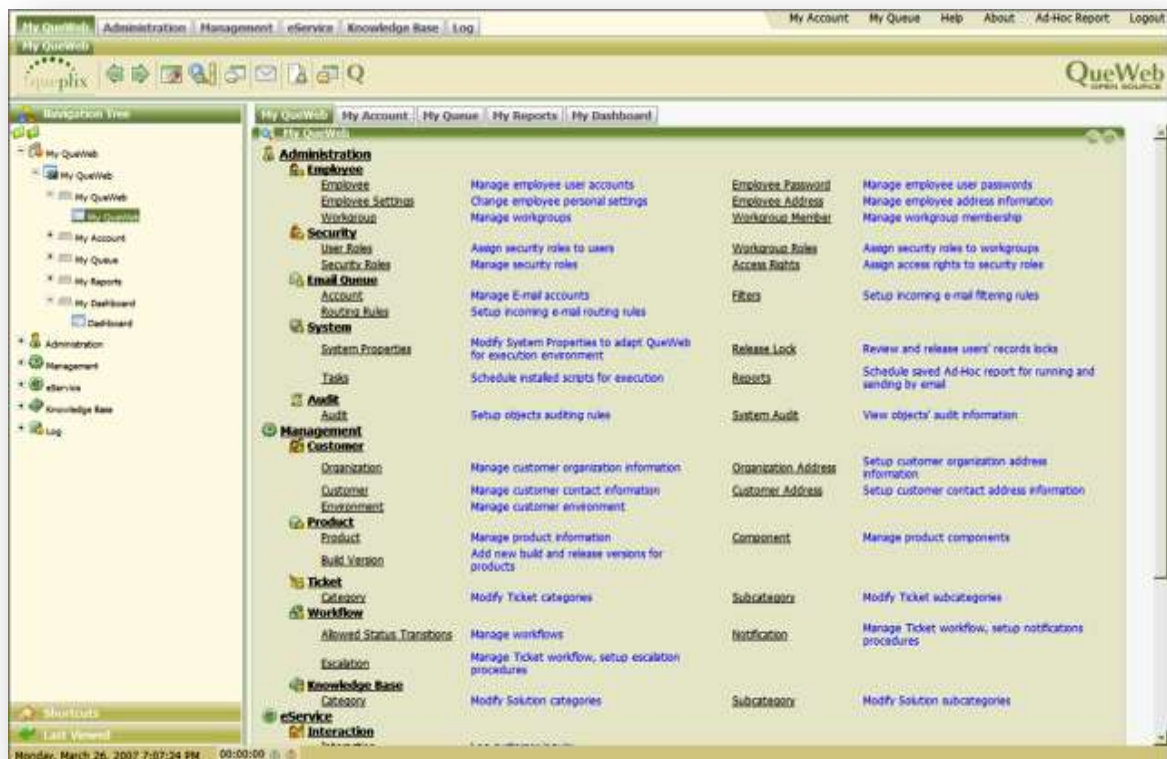


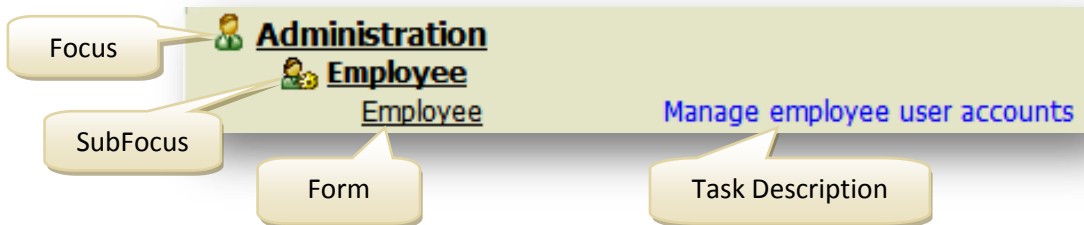
FIGURE 3 MY QUEWEB FOCUS

My QueWeb Focus provides access to several Tabs:

- My QueWeb
- My Account
- My Queue
- My Reports
- My Dashboard

MY QUEWEB TAB is an Application Map, providing quick navigation to all available functions and tasks within your Role. A functional object in My QueWeb is represented by its icon, name and description, grouped using the **application object hierarchy** diagram.

For example:



You can click on any object here to quickly navigate to the appropriate screen.

MY ACCOUNT TAB

You can navigate to My Account by clicking on the second Tab in the My QueWeb Focus or by clicking on My Account link in the top right portion of the Main Toolbar.

The screenshot shows the 'My Account' tab selected in the top navigation bar. The main content area is divided into four sections:

- My Profile:** 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, Organization, and Manager. It includes 'Search', 'Clear', and 'Change' buttons, and a 'Notes' section with an 'Audit' button.
- My Password:** Contains fields for Full Name, User ID, New Password, and Confirm Password. It includes 'Search', 'Clear', and 'Change' buttons.
- My Settings:** Contains dropdown menus for Employee, Date Pattern, Language, Timezone, Time Pattern, and Date Position. It includes 'Search', 'Clear', 'New', and 'Change' buttons.
- My Address:** Contains fields for Address Type, Employee, Address, Address2, City, State, Zip, Country, Phone, Fax, and Other. It includes 'Search', 'Clear', 'New', and 'Change' buttons, and a 'Notes' section with a button.

FIGURE 4 MY ACCOUNT TAB

My Account Tab is used to maintain your personal information: Your name, User and Employee ID, address and phone numbers, reset your password and locale settings.

There are four Forms in this Tab:

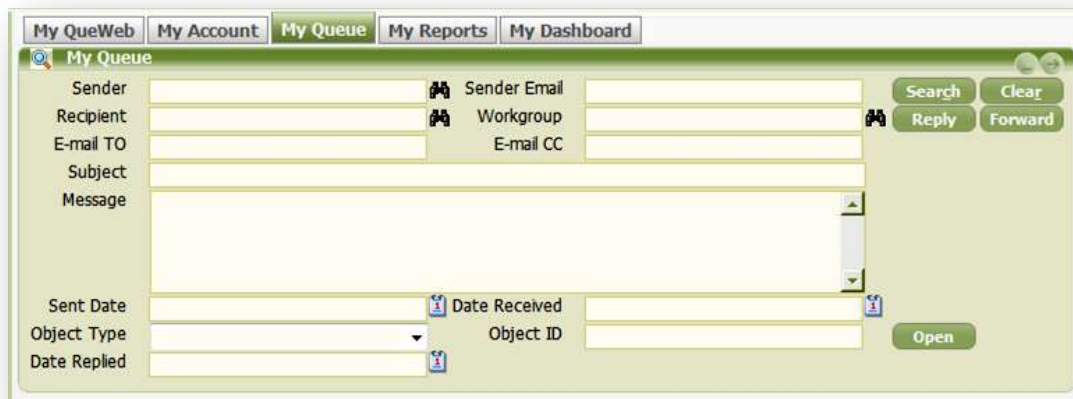
- My Profile
- My Password
- My Settings
- My Address

Once your information is displayed in all four Forms, you can click CHANGE button in individual Forms and correct any information in this Form. Click SAVE to update your changes.

MY QUEUE TAB

My Queue displays all records that require personal attention and designated for the current user or his/her workgroup. My Queue may contain incoming emails routed to you, Tickets assigned to you or your workgroup, alerts, notifications and escalations. You can start daily tasks by reviewing new records in My Queue.

System Administrator designates email accounts to be monitored by the system. All emails that come into these email accounts will be routed using appropriate routing rules to Agents' or Workgroups' Queues. Depending on the Routing Rule, an incoming Email could automatically create a Ticket or Interaction: if a Routing Rule distributes the email to an Agent or a Workgroup in your company, then the Ticket is automatically created and linked to the email. If the system did not find any Routing Rules based on the criteria specified, then the system will create an Interaction record only and link it to the email. In this case Agents can choose to create a Ticket from the Interaction upon reviewing it.



The screenshot shows a web application interface with a navigation bar at the top containing tabs: "My QueWeb", "My Account", "My Queue" (which is highlighted), "My Reports", and "My Dashboard". Below the navigation bar is the "My Queue" form. The form has a light green header and contains several input fields and buttons. On the left side, there are fields for "Sender", "Recipient", "E-mail TO", "Subject", and "Message". On the right side, there are fields for "Sender Email", "Workgroup", and "E-mail CC". Below these are fields for "Sent Date", "Date Received", "Object Type", and "Date Replied". There is also an "Object ID" field. On the far right, there are buttons for "Search", "Clear", "Reply", "Forward", and "Open".

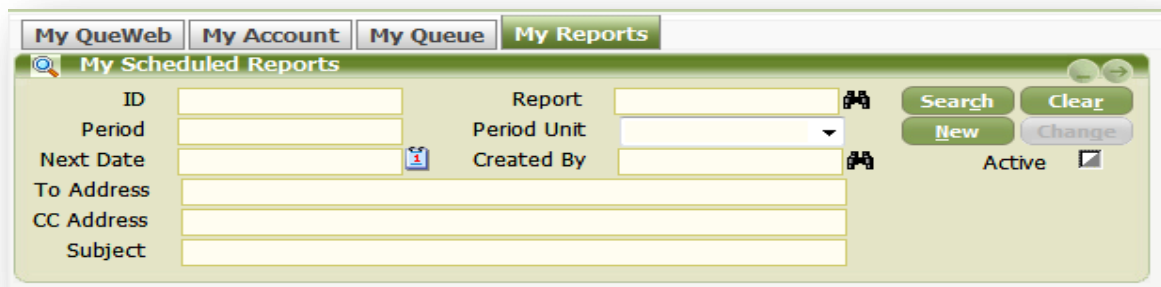
Figure 5 MyQueue Form

In My Queue you can perform the following actions:

- Search for and review My Queue entries
- Reply to Email
- Forward Email
- Open the Ticket or Interaction which system created based on the original email by clicking on the Open button next to the Object Type and Object ID fields, which indicate the object type (Ticket or Interaction) and its unique ID number.
- Delete entries from My Queue list

MY REPORTS TAB

In this personal Tab Agents can create and schedule their custom Ad-Hoc reports. The report must be first created in order to be placed on the execution schedule.



The screenshot shows a web interface with a navigation bar at the top containing tabs: 'My QueWeb', 'My Account', 'My Queue', and 'My Reports'. The 'My Reports' tab is selected. Below the navigation bar is a section titled 'My Scheduled Reports'. This section contains a form with the following fields and controls:

- ID**: A text input field.
- Report**: A text input field with a magnifying glass icon to its right.
- Period**: A text input field.
- Period Unit**: A dropdown menu.
- Next Date**: A text input field with a calendar icon to its right.
- Created By**: A text input field with a magnifying glass icon to its right.
- To Address**: A text input field.
- CC Address**: A text input field.
- Subject**: A text input field.
- Search**: A green button.
- Clear**: A green button.
- New**: A green button.
- Change**: A grey button.
- Active**: A checkbox with a checkmark.

FIGURE 6 MY REPORTS FORM

To put a report on the schedule you need to click **New** button and then select your report in the Reference field Report and specify Period and Units as often as you want to run this report. You must provide the Subject and the distribution email list for the Scheduler. In order to quickly disable execution of the report without deleting it – uncheck the Active button.

QUEWEB GRAPHICAL USER INTERFACE (GUI)

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

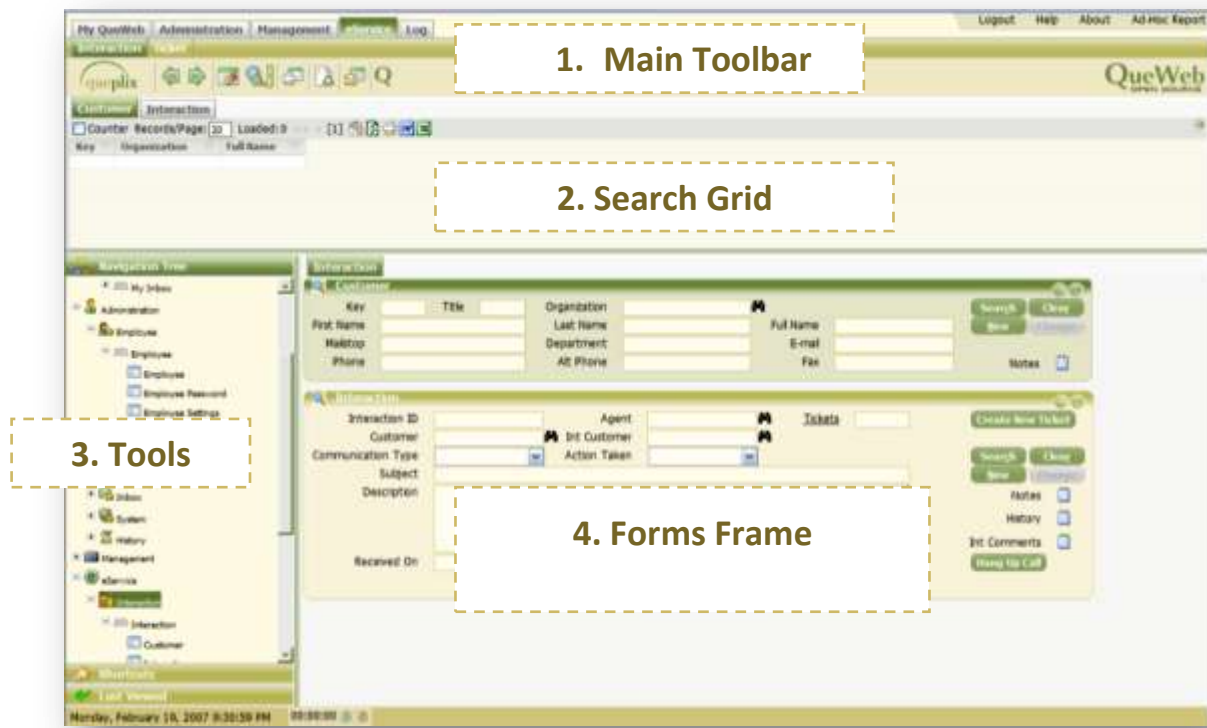


FIGURE 7 QUEWEB GUI FRAMES

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 looks like this:



FIGURE 8 MAIN TOOLBAR

Let's zoom in on the left side:

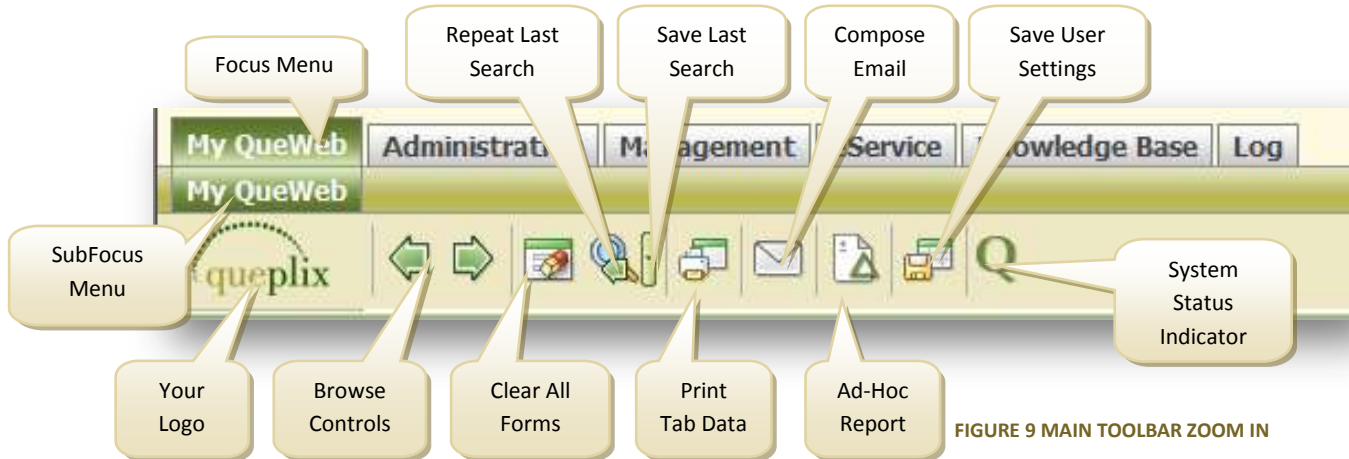





FIGURE 9 MAIN TOOLBAR ZOOM IN

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 send the Form with currently displayed data in it to your printer. **Compose Email** button will open a window in which you can compose 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 Ad-Hoc reports. **Save Settings** will memorize all personal configuration changes in your current session and will load them next time you login.

System Status Indicator will change to reflect current state of the system:

Ready (System idle)	
Reading Data from Server	
Busy (No User Operations Possible)	

Now let's zoom in on the right side:

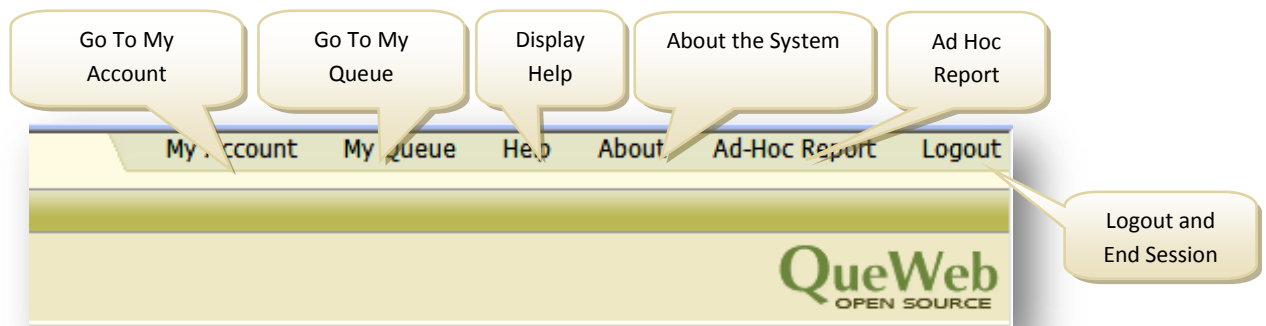


FIGURE 10MAIN TOOLBAR ZOOM IN

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 11 SEARCH GRID

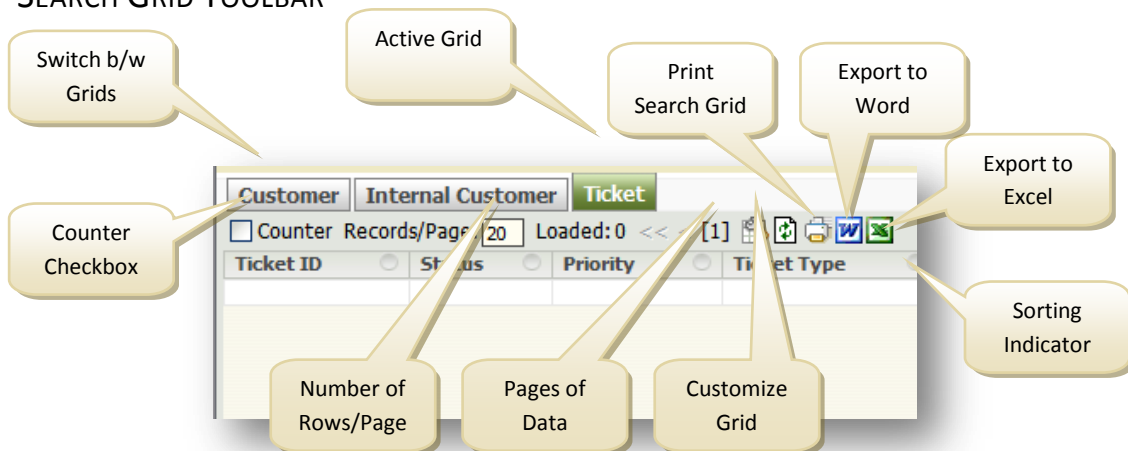
Any search within the given Form will always bring the results into the dedicated Search Grid. Because a Tab can contain several Forms, there are as many Grids on the screen as there are Forms. You can switch between Grids by clicking on their labels. The Grid will

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

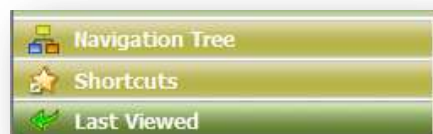


You can select rows in the Grid in order to perform certain functions on them by using the CTRL and SHIFT keys combinations with mouse or use a Record Select Control on the right of the Grid Toolbar to select all records or invert your current selection.

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** tool will keep track of all objects you select in the Search Grid. You can quickly return to them by clicking on the objects in the Last Viewed tool.

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:

The screenshot shows the 'Interaction' form interface. At the top left, there is a 'Mode Indicator' icon (a magnifying glass) and the 'Form Label' 'Interaction'. On the top right, there are 'Minimize Control' and 'Menu Control' icons. The form contains several input fields: 'Interaction ID', 'Agent', 'Tickets', 'Customer', 'Int Customer', 'Communication Type' (a dropdown menu), 'Action Taken' (a dropdown menu), 'Subject', 'Description' (a large text area), 'Received On', 'Modified On', 'Modified By', and 'Phone Time'. On the right side, there are several buttons: 'Create New Ticket', 'Search', 'Clear', 'New', 'Change', 'Notes' (with a clipboard icon), 'History' (with a clipboard icon), 'Int Comments' (with a clipboard icon), and 'Hang Up Call'.

FIGURE 12 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.

FORM OBJECTS

A Form Object is a basic building block of the QueWeb system. Each Form contains a number of these objects. Through Form Objects users interact with the system by entering search criteria and reading data displayed in them as well as activating some objects to perform an action. Types of Objects could be Data Fields, Buttons and Custom Objects.

The following types of GUI Objects are available in QueWeb:

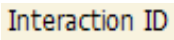



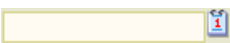

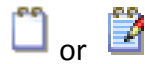
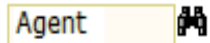

Object Name	Image	Purpose	Data Type
Label or Caption		Designates the name of the field usually positioned next to it.	None
Text Field		Stores and displays text information in a single line of a finite length. Length of the text it can store is limited by the length of the associated database column. During searches – length of the query text is limited to 256 characters.	String of any characters
Combo Box		Allows user to select from the list of predefined values. Only one value is selectable.	Array of text values
Check Box		Allows three settings: Checked, Unchecked and Not Specified.	Binary
Date Field		A Combination of a searchable text field and a Push Button, which opens a Calendar widget. See Date Fields .	Date (Date Time)
Multi-Line Text Field		Text field which allows the text to continue on several lines. Scroll bar appears when text is longer than the visible lines on screen. Same text length limitations apply as for single-line text fields.	Variable characters of limited length
Long Text Field		Searchable field, used to store a large amount of text.	CLOB or BLOB or TEXT
Reference Field		A look-up field, used to link records. Its label could be a hyperlink to another Form.	Stores reference to another record
Push Button		Performs an action, designated by its label.	N/A

FIGURE 13 GUI OBJECTS & FIELDS

DATE FIELDS

Date Fields store the date and sometimes time information. They consist of two elements: text field and calendar widget button. Date string field is searchable and you can

type in the date in it to constrain your search. You can also click on the calendar button to open the Calendar Widget (See fig. to the left).

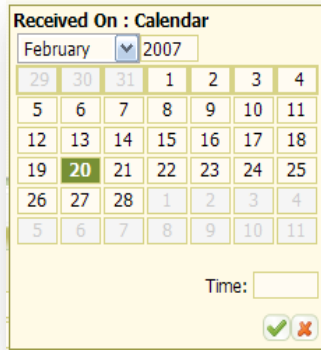





FIGURE 14 CALENDAR WIDGET

When opened with an empty date text field – the calendar will display current date and time (time only if Form is in New or Change modes), otherwise it will display the date and time previously typed into the text field. When the widget opened with exiting record in the Form – it will display the date and time saved in that record.

When searching for a date, you can select any month and year and then double-click on any date to select it. In order to select a date range for a search you can click on the initial date and then on the final date in the range. When you are done selecting the date(s) – press  and your selection will fill into the corresponding text field. For date ranges system uses “..” between the two dates (For additional allowed date Formats and other advanced dates operations please see Advanced Search). Users can utilize date “shortcuts” by typing “today” or “now” which will be translated into the current date or date and time.

When Calendar widget is open – you cannot use any other controls in the system until you close the Calendar.

NOTEPAD FIELDS

Notepad or Notepad fields are used to store the large amount of text. This type of a field is used for example in History or Ticket Problem Description. The field has two modes indicated by its two icons: *empty* notepad  and *filled* notepad  which contains data.

Notepad fields could be of several types:

- Append – when User can only add text to the end of the existing text
- Prepend - when User can only add text to the beginning of the existing text
- Read-only – User can only read text (usually system generated, i.e. History)
- Editable – User can edit and delete any text in the field.

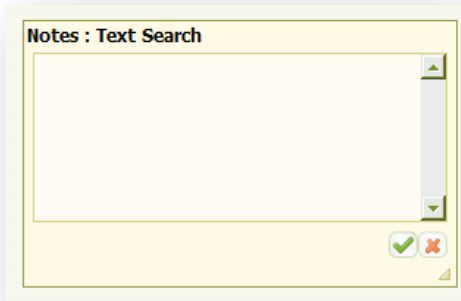


Figure 16 Example of Notepad in a Search Mode

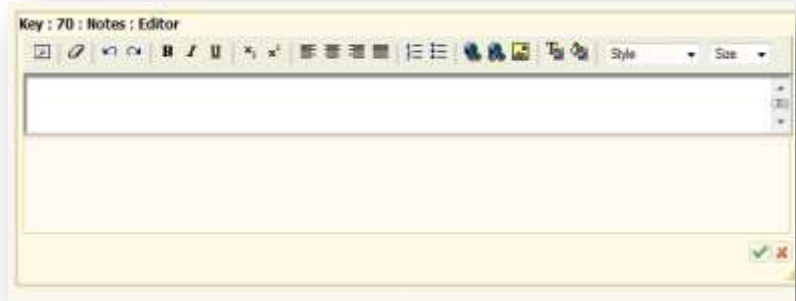

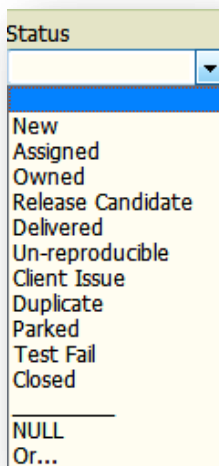


Figure 15 Example of Notepad in an Edit Mode

You can constrain the Form search using a combination of regular fields and Notepad fields. In order to constrain your search - open the Notepad field (when Form is clear) and type in the search string, press  and then use Search Button in the Form containing the Notepad field. When Notepad is open – you cannot use any other controls in the system until you close the Notepad.

COMBO BOXES A.K.A “DROPDOWN” FIELDS




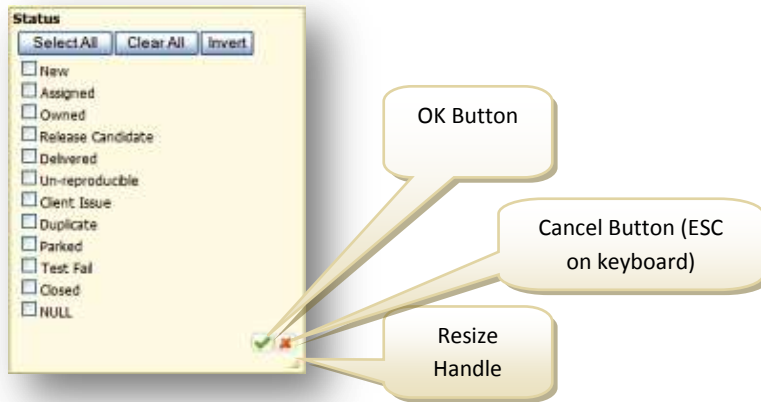
These fields allow searching for or saving a record with a single predetermined value. In the search mode however, you can select multiple values as constraints by selecting OR value at the end of any dropdown field values. When OR is selected – a new window will open with the same choices available in the combo-box, but in this window you can make multiple selections at the same time. For example – you need to search for Tickets that are in “Pending” and “Assigned” statuses: in this case you will use the OR Search in the Status field, select “Pending” and “Assigned” check-boxes, click  and then use the Search button in the Form. You can also invert your values selection by using the corresponding Invert button. This is

FIGURE 17 DROP DOWN FIELD IN A SEARCH MODE

useful when you need to select all values except one, in this case you would select that one value to be excluded and click inverse button. In addition, you can use OR... mode for the multi-select option or NULL mode when the system will search for blank values only.



AUDIT FIELD

FIGURE 18 DROP DOWN FIELD IN "OR" MODE

System uses special read-only type of Notepad fields to track all record changes by any user, called Audit. System Administrator can select which fields in which Forms are tracked in the Audit. You can access the Audit field and view its contents by clicking on the Notepad field with the label Audit.

Every time you create a new record or update existing record in the Form, which has an Audit button – the change is reflected in the Audit field in the following format:

The image shows a window titled "Key : 21 : History". Inside the window is a table with the following data:


Admin, Administrator (0) 30 Jan 2007 21:24		
Field:	Old value:	New value:
Notes		Admin, Administrator, 30 Jan 2007 21:25 text

At the bottom right of the window, there are two small icons: a green checkmark and a red 'X'.


Figure 19 Audit Field example

Any user can see the changes made by all other users without restrictions.

REFERENCE FIELD

The Reference field consists of two elements: searchable text field and the “Binoculars” button . This field can be used when creating a new record or updating existing record to link it to another record. You can also use reference fields to constrain your searches.

If you type the constraint in the text field of a Reference field and press TAB or click out to any other field – system will try to automatically look up the foreign record and once it’s found – it will fill the record into the text portion of the Reference field. At the same time, the referenced record may backfill into its corresponding Form (which may not be visible to the User but is available when User switches to another Tab; because of this feature sometimes it is required to Clear All Tabs in order to perform a new search).

Once the reference record is filled, the binocular icon will change to . By clicking on the Binoculars User can display the Reference Grid (see [Grids](#) for more information) and review more detailed information about the reference record: while the text field can display one field from the Foreign record (identifying the Foreign record), the Reference Grid will allow to see more than one field to make sure this is in fact the record you need.

In order to “unlink” the Foreign record from the Parent record – press **CHANGE** button while having the Form populated with the parent record and highlight the text in the field and press delete, once finished press SAVE to break the link between the records.

EMAIL QUEUE

Email Queue module enables monitoring and saving of the Incoming and Outgoing email by integrating QueWeb email processing with your corporate email server. This module is administered from the Administration portal of QueWeb and is tightly integrated with existing system infrastructure and business rules, making the email communication channel an essential part of the business process. QueWeb allows Agents to receive, process and send replies to all emails without the need to install any additional software. The email processing is also a server-based module, requiring no installation or configuration at the client side. QueWeb Email Queue module can be used in addition to your standard email client, such as Outlook or Lotus Notes. Emails processed and sent from the QueWeb will also appear in your email client (certain limitations apply). However, when email is processed (sent or received) from the QueWeb client, it will be captured in QueWeb’s objects and attached to Tickets and Interactions. Using QueWeb for email communications in addition to your email client allows Agents to keep track of all incoming and outgoing emails in conjunction with the Customer records and their

Interactions/Tickets. Email Attachments processed by QueWeb are also saved and linked to Tickets/Interactions. Most importantly, QueWeb provides a mechanism for routing emails to the appropriate users or groups of Agents within your organization, based on the customizable criteria.

Outline of major functions performed by the Email Queue module:

- All emails are stored in database, making a centralized maintenance and tracking a very easy and manageable process. Unified archiving rules and storage policies applied to all email communications.
- Processing of Incoming Email from predefined Accounts (i.e. support@yourcompany.com)
- Spam Filtering of incoming emails based on sets of customizable filters
- Routing of emails based on a keyword for each email account
- Notification and distribution of emails by Workgroup Tiers, Ticket Owners
- Automatic Ticket and Interaction creation and assignment based on Routing Rules
- Automatic tracking of email threads; emails threads are stored together and linked to a Ticket.
- Reporting for any measurable statistics for email processing, categorization of emails for reporting purposes



FIGURE 20 EMAIL QUEUE PROCESSING SCHEMA

The filters can be created based on a keyword combination, which are searched in the following fields within incoming email message:

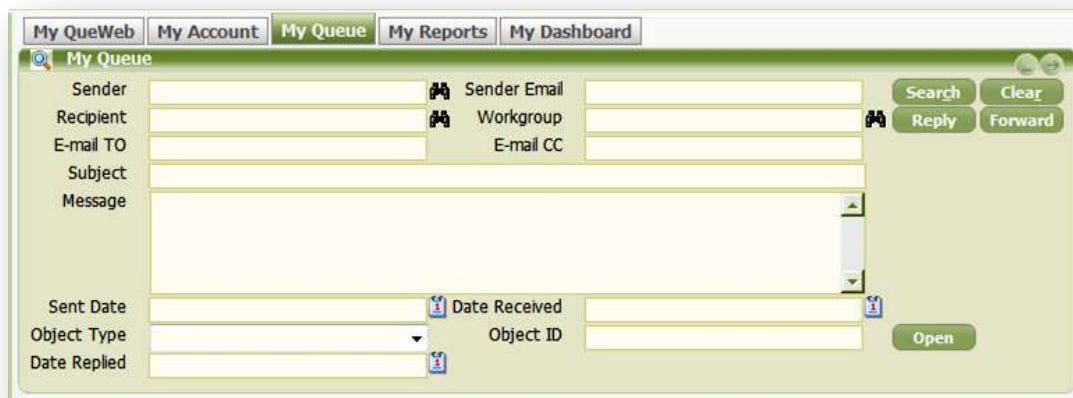
- FROM Address
- TO Address
- Subject
- Body of email

Once you receive a message in the My Queue it means that it was not blocked by any of the filters and routed to you personally or the Workgroup to which you belong or you have been identified as the default Owner of this email. In the later case – no Routing Rules or filters were applicable.

Incoming emails may automatically create a new Interaction or Ticket, which may be assigned to the Workgroup and Owner; this does not apply to secondary and consecutive emails on the same subject and replies to the original emails from the Customer in the same Subject, in other words if the Ticket was already created system will not create new tickets for the subsequent email communications relating to the same subject. If the Routing Rule was evaluated and email is routed - then a Ticket is created; otherwise the email is captured in Interaction object only. An Agent can create a Ticket manually from the Interaction.

Attachments included in the emails will be displayed in the Attachments Form or if Ticket or Interaction is created – linked to the corresponding object. Users may delete emails depending on a specific set of User permissions.

MY QUEUE



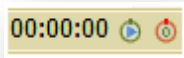
The screenshot displays the 'My Queue' section of a web application. At the top, there are navigation tabs: 'My QueWeb', 'My Account', 'My Queue' (which is active), 'My Reports', and 'My Dashboard'. Below the tabs, the 'My Queue' header is visible. The main area contains several input fields for filtering messages: 'Sender', 'Recipient', 'E-mail TO', 'Subject', and 'Message'. To the right of these fields are buttons for 'Search', 'Clear', 'Reply', and 'Forward'. Below the main filter fields, there are additional fields for 'Sender Email', 'Workgroup', and 'E-mail CC'. At the bottom of the form, there are fields for 'Sent Date', 'Date Received', 'Object Type', and 'Object ID', along with an 'Open' button. The interface has a light green and white color scheme.

FIGURE 21 MY QUEUE

You can access My Queue in several ways: from the My QueWeb or by clicking the link in the top right portion of the Main Toolbar.

TIMER

Timer is provided for your reference in tracking time for certain actions you perform.



You may time yourself on creating a Ticket, average handling time per Ticket, etc. Timer can also be turned on and off by System Administrator inside a certain process to automatically capture the amount of time Users spend doing certain activities in the system. The **Start** button will start the countdown and becomes **Pause** button, while the **Reset** button will reset the timer. Clicking **Reset** button while Timer has been started – will reset the time and continue the countdown.

AD HOC REPORT




Ad Hoc Report allows you to quickly create a report from QueWeb GUI. It provides a quick and intuitive way to create simple reports right in any Focus.

The concept of Ad Hoc report is to use the same Focuses and Forms GUI that users are accustomed with and use in the daily tasks. In order to start the Ad Hoc Report, navigate to the Form from which you will you have to get data for your report. Click on the Ad Hoc



NOTE

You need to right-mouse click on the column in to select it for removal or rename. Left clicking will sort the column.

Report button in the Main toolbar: . You can start creating your report by clicking on  icons next to the fields you want to include in your report; selected fields will be indicated by  icon. Once finished with fields' selection, click on the Ad Hoc Report menu in the User Toolbar. The Report Window will open where you can run your report, save it or export the contents to Microsoft Office® programs.

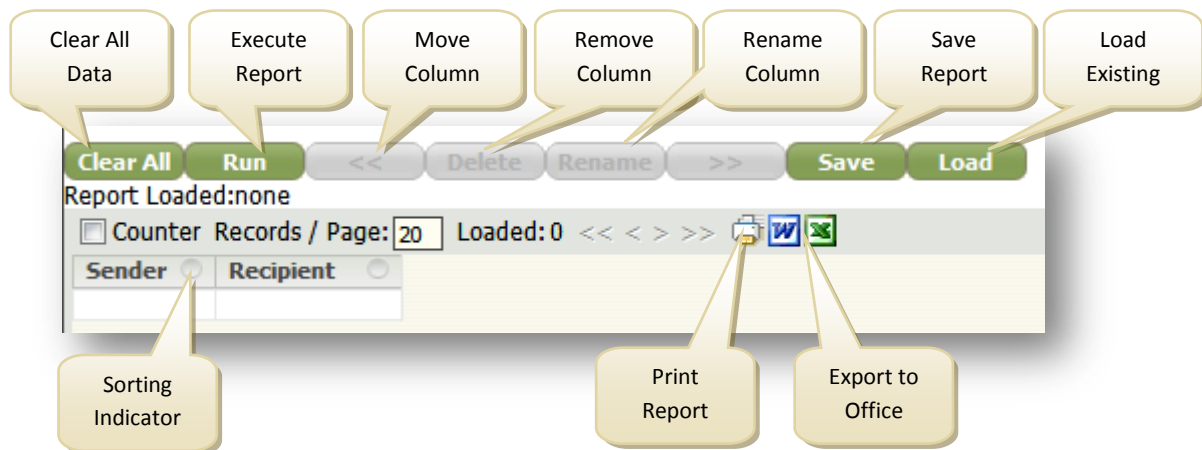



FIGURE 22 AD HOC REPORT MENU

Considerations when creating ad-hoc reports:

- Column captions in report writer will be the same as the label names that you select for report. If you start in one Form – collect all the fields from that Form before continuing to the next Form. You can also change the column captions in Report Writer once it is fully created.
- Report Writer uses the relational database and links between the tables to create reports. Once you start adding fields to your report, the system will indicate the fields which cannot be added to the same report, as they don't have any relationships in the database, Ad Hoc report will mark those fields with  icon.

Report Writer uses the same concept when using the Grid Counter as used in the system [Grid](#).

You have an ability to save reports after they have been constructed by clicking on the Save Button.

HELP

QueWeb help can be accessed by clicking in the top right portion of the Main Toolbar. Help contents provided in HTML Format, and they are context-sensitive. In other words, when you press the Help Button at a certain Tab - you will see the Help information on this particular Tab.

ABOUT

This information window provides Queplix Corp. technical support contact numbers and full application version.

ADVANCED SEARCH

This chapter contains information about the advanced search operators you can use in the application GUI fields.

The following Table lists operators allowed in QueWeb and to which data types they apply:

Operator (Meaning)	String	Date	Number
> (Greater Than)	✓	✓	✓
< (Less Than)	✓	✓	✓
>= (Greater Or Equal Than)	✓	✓	✓
<= Less Or Equal Than	✓	✓	✓
! (Not Equal)	✓	✓	✓
= (Exact Match)	✓		
& (Logical AND)	✓	✓	✓
(Logical OR)	✓	✓	✓
.. (Date Interval)		✓	
^nnn (search string must start with nnn)	✓		
\$ (search results must end with nnn)	✓		
+ (Math Plus)		✓	
- (Math Minus)			
* (Substitute any characters)	✓		
? (Substitute any number of characters; each ? represents one character)	✓		
@ (Case Insensitive)	✓		

FIGURE 23 ADVANCED SEARCH OPERATORS

Modifiers used in table:

- d= DAY
- M=Month
- y=Year

You can set one of the following Date formats for your account:

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



NOTE

If you want to search for a reserved symbol used as an Operator then this symbol has to be enclosed in backslashes: '\'. For example, a user needs records with 'AT&T' in the name field. In this case he or she would have to type 'AT&\&\T' in the name field.

ADDITIONAL DATE CONSTANTS

To search for today's date, type "today" in the date field. You can use this variable to perform "date arithmetic" by specifying a number of days as in "today-nd", where n is the number of days.

For example, to specify the date range 10 days ago to today, you would enter:

"today-10d .. today", for a search for the 1 month back in time you would enter "today-1m .. today". If you omit the date qualifier (m, d or h) – the system search by default in hours: "today-24 .. today" – will produce all records in the past 24 hours.

eService Focus is designed for Agents to capture Interactions with Customers and create review and maintain Tickets. Agents operating in the eService focus rely on data identified in the Management Focus and on various workflow processes defined in the Administration Focus.



CAPTURING CUSTOMER INTERACTIONS

First object that is being created in QueWeb on every Customer contact is called Interaction. Interactions are designed to quickly record the communication regardless of its channel: email, phone, etc. By capturing all Interactions in your Customer Care system, you endure a complete history of the Customer communications, as well as you can measure the subjective aspects of Customer Care: frequency of Interactions, experience patterns, buying habits, Customer Care quality rates, amount of feedback regarding certain product or service you offer.

Interactions can become Tickets, however, not all Interactions should. An Agent can decide whether he or she should create a Ticket from an Interaction. Usually this is required when further research or attention is required to the matter raised in the Interaction.

Interactions must be linked to external or internal Customers (Employees). Standard QueWeb OSS communication types through which Interaction can be made and captured are:

- Incoming and Outgoing Calls
- Incoming and Outgoing Emails
- Fax
- Walk Up
- Other

FIGURE 24 STANDARD INTERACTION TAB

You can always see if any Tickets were created from an Interaction by inspecting the Tickets field counter. Clicking on the caption of this field will transfer you to the Ticket SubFocus and populate its Grid with linked records. Agents should be able to resolve most Interaction as they come in. In this case, Agent can indicate that Interaction does not require further attention by setting the **Action Taken** field to “Resolved by Agent” value. In a case where further research is required – Agent can choose to create a Ticket by clicking on corresponding button. The Ticket will be created using information provided in the Interaction record; the **Action Taken** field will reflect that event: “Ticket Linked”.

Agents can provide short Subject and Description of the Interaction manually; in case of Interactions Type created by the system from incoming Customer emails – the Subject, Description will be auto-filled with the Subject and Email body contents automatically. These contents will also be transferred to the Ticket if it’s created. More information can be provided in Notes and Internal Notes fields. Internal Notes field can be used if you upgrade to the Enterprise Edition; this field is not exposed to Customers in Customer Portal (available in QueWeb Enterprise Edition) and can be used to store any internal information.

While working on the telephone, Agents can use **Hang up Call** button to indicate that the phone was disconnected and continue to work on the Interaction and or Ticket. The time spent on the phone is captured from the moment Agent clicks on the **New** button until he or she either clicks **Hang Up Call** or **Save** buttons. The captured elapsed phone time is used in statistical analysis.

A typical workflow for working with Tickets in QueWeb Customer Care Suite 3.0 can be described as follows:

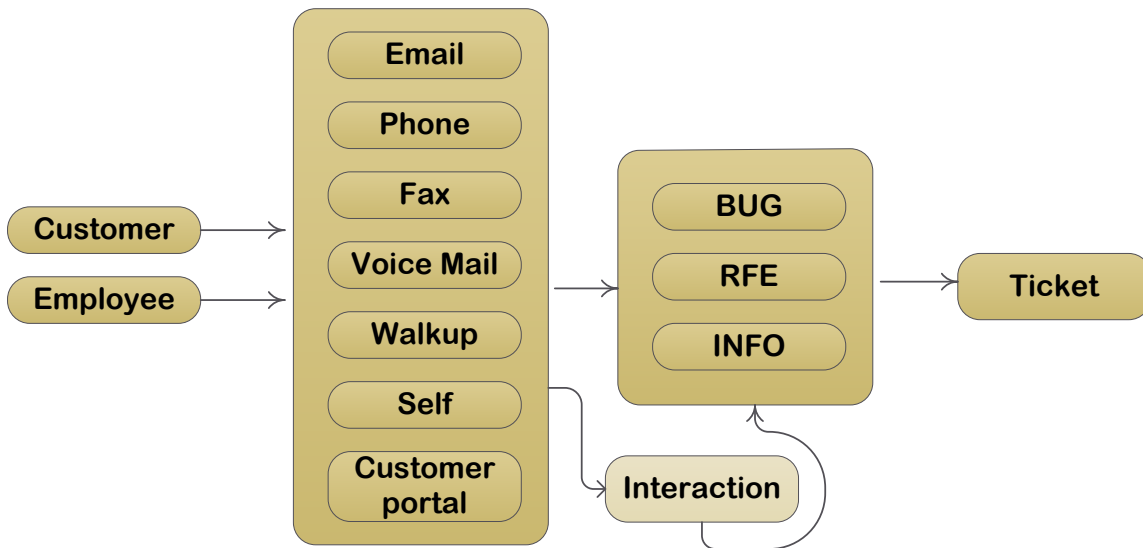


FIGURE 25 TICKET WORKFLOW

External Customer or an Internal Customer (Employee) initiates an interaction with a call center Agent via email, phone, etc. Agent identifies an inquiry as a request for enhancement, request for information or as a bug submittal and creates a Ticket.

To work with Tickets Agents use **eService** Focus, Ticket SubFocus. To create a new Ticket Agent needs to press the “New” button. If Agent wants to modify the Ticket he or she will press the “Change” button. For new Tickets some fields on the Form are auto populated with default values. Some fields are required and have to be filled in by a User before Ticket information can be saved. List of required fields may vary based on the Ticket status. The required fields are marked in **red** color and as soon as they receive expected input they change color to black. The system will alert you if you are trying to save a record while missing input for required fields.

TICKET TAB

The screenshot shows a 'Ticket' form with various input fields and buttons. At the top, there are dropdown menus for Ticket ID, Status, Priority, Impact, and Ticket Type. Below these are more dropdowns for Category, Subcategory, Origin, Reason Code, and Subject. A large text area is provided for Description and Response. To the right, there are buttons for 'Search', 'Clear', 'New', and 'Change'. Below these are links for 'Link To Interaction', 'Events', and 'Communications', each with a corresponding input field. Further down, there are several rows of fields with icons, including 'Agent', 'Workgroup', 'Owner', 'Customer', 'Employee', 'Reopened Times', 'Reported On', 'Requested By', 'Hold Until', 'In Current Status Since', 'Delivered Since', 'Modified On', 'Assigned On', 'Owned On', 'ETA', 'Last Reopened On', 'Closed On', 'Modified By', 'Product', 'Component', 'Reported In Build', 'Resolved In Build', 'Reported Environment', and 'Tested Environment'.

FIGURE 26 TICKET FORM

Each Ticket when created needs to be linked either to External Customer or Internal Customer (Employee). Agent has an ability to create a new Customer record and link it to a new Ticket on the same Tab. However, it is always advised to search for existing Customer first. To create a new External Customer record or search for existing ones, Agents can use Customer Form on top of the Tab.

The screenshot shows a 'Customer' form with several input fields. There are fields for 'Key', 'Title', 'Organization', 'Department', 'First Name', 'Last Name', 'Full Name', 'Phone', 'Fax', and 'Email'. On the right side, there are buttons for 'Search', 'Clear', 'New', and 'Change', along with a 'Notes' icon.

FIGURE 27 CUSTOMER FORM

If the Ticket needs to be linked to Internal Customer (aka Employee) Agent can use Internal Customer Form instead. Since all employees are maintained by QueWeb System Administrators this Form will be read-only and will not allow creation of new records or modification of the existing ones. If your organization always uses Internal or External Customer Forms, you can easily customize QueWeb to hide one of these Forms; alternatively you can click Minimize Form button and click Save Settings in the Main Toolbar. This will always keep unnecessary Form minimized.

FIGURE 28 INTERNAL CUSTOMER FORM

The following table describes all the fields and their meanings in the Ticket Form.

Field Name	Field Type	Description	Comment
Ticket ID	Text	Unique Ticket identifier. Automatically generated with a sequential number from the last generated Ticket id + 1. The field is grayed out and cannot be altered during the change option.	Read-only field Auto-generated
Status	Dropdown	Indicates the Ticket status. Only one option can be selected for update. <i>New</i> is the default status. Ticket must be saved under <i>New</i> status first before it can be moved to any other status. See Ticket Workflow chapter for more details.	Required field Default: <i>New</i>
Priority	Dropdown	Indicates the priority of the Ticket. Possible values are: <ul style="list-style-type: none"> • 1-Critical • 2-Serious • 3-Moderate • 4-Low This field is used by the Workflow Manager to send out Notifications and Escalations.	Required field Default: <i>3 - Moderate</i>
Impact	Dropdown	Says how big the impact of the reported problem is. Possible values are: <ul style="list-style-type: none"> • All Sites • System Down • Site • Group • Individual 	
Ticket Type	Dropdown	Says what kind the Ticket is. Possible values are: <ul style="list-style-type: none"> • BUG One of possible meanings is “a software bug” • RFE Request for Enhancement. When a Customer needs an enhancement for the system. • INFO When client requires more information on any issue. 	Required field

Field Name	Field Type	Description	Comment
Category	Dropdown	Typically used to indicate the business domain of the reported Ticket. Every Category value can have 0 to many Subcategory values. List of values in the drop down as well as connected subcategories are maintained by QueWeb System Administrator.	
Subcategory	Dropdown	Indicates the subcategory within business domain relevant to the Ticket. The values in the drop down are dynamic, they will change based on the value selected in the Category field.	Dynamic values
Origin	Dropdown	Tells how the Customer contacted the support. Possible values are: <ul style="list-style-type: none"> • Email • Phone • Fax • Voice Mail • Walkup • Self 	Required field Default: <i>Phone</i>
Reason Code	Dropdown	Reason for closure. Gives a short definition why the Ticket was closed. Possible values are: <ul style="list-style-type: none"> • Training Issue • Patch/Upgrade • Configuration Issue • Correct Behavior • Documentation Error • Insufficient Evidence • Product Limitation • Support Expired • Withdrawn • Other 	Field is required if Status of the Ticket is <i>Closed</i>
Other	Text	Additional field to better describe why Ticket was closed.	Field is required if Reason Code is <i>Other</i>
Subject	Text	Single line text box to briefly describe Ticket problem.	Required field
Solution	Reference	Allows searching for and linking Solution from the Knowledge Base.	
Description	Text	Multiline text box to describe what the problem is in more details.	Required field
Description	Notepad	This field can be used to give a full description of the reported problem.	
Int. Comments	Notepad	This field can be used to capture any information regarding the Ticket that is for internal use only.	
Notes	Notepad	Notes about the Ticket.	
Response	Text	Multiline text box to track the response from Agent to Customer.	

Field Name	Field Type	Description	Comment
Response	Notepad	The field can be used to track the response from Agent to Customer in full details.	
Agent	Reference	Reference to Agent – person who accepted the Customer inquiry.	Required field
Workgroup	Reference	Reference to Workgroup that was assigned or responsible for the Ticket resolution.	
Owner	Reference	Reference to an Agent who is responsible for the Ticket resolution at the moment.	
Customer	Reference	Reference to External Customer. Either external or internal Customer needs to be selected for the Ticket.	
Int. Customer	Reference	Reference to Internal Customer (Employee). Either external or internal Customer needs to be selected for the Ticket.	
Product	Reference	Reference to Product. Indicates the product the inquiry is about. When Product Form is populated on the Product Tab of the Ticket sub focus this field will auto populate. Value in the Product field will derive possible values in the Component and Reported in Build fields.	Required field
Component	Reference	Reference to the Component of the Product the Customer's enquiry is about. The values in the field are derived from the Product field.	
Reported in Build	Reference	Reference to the build version the Customer's enquiry is about. The values in the field are derived from the Product field.	Required field
Reported Environment	Reference	Reference to the environment information at the Customer's site where the product is running and that is relevant to the enquiry. Clicking the field caption will bring user to the screen with environment details.	
Test Environment	Reference	Reference to the environment where the delivered Ticket was tested.	
Events	Text	Shows the number of Ticket Events that can be reviewed on the Ticket Event Tab. Clicking the field caption will take the user to the corresponding Form.	Read-only Auto calculated
Communications	Text	Shows the number of Interactions with the Customer regarding this enquiry. Clicking the field caption will take the user to the corresponding screen.	Read-only Auto calculated
Reported On	Calendar	Tells the exact day and time when the Ticket was created.	Read-only Auto calculated
Requested By	Calendar	Agent can use this field to capture information about the date and time when Customer would like to have the enquiry completed.	

Field Name	Field Type	Description	Comment
Hold Until	Calendar	Agent can use this field to indicate that no actions are needed regarding this enquiry until some day.	
In Current Status Since	Calendar	Keeps the date and time information of the moment when Ticket' status was changed last time.	Read-only Auto calculated
Delivered Since	Calendar	Keeps the date and time information of the moment when Ticket was in the Delivered status last time.	Read-only Auto calculated
Modified On	Calendar	Keeps the date and time when the Ticket was modified last time.	Read-only Auto calculated.
Assigned On	Calendar	Keeps the date and time information of the moment when Ticket was in the Assigned status last time.	Read-only Auto calculated.
Owned On	Calendar	Keeps the date and time information of the moment when Ticket was in the Owned status last time.	Read-only Auto calculated
ETA	Calendar	Estimated Time of Arrival. Agents can use this field to indicate when the Ticket is expected to be delivered or resolved.	
Last Reopened On	Calendar	Keeps the date and time information of the moment when Ticket was moved from Closed status to New.	Read-only Auto calculated
Closed On	Calendar	Keeps the date and time information of the moment when Ticket was closed.	Read-only Auto calculated
Modified By	Reference	Link to an Agent record who modified the Ticket last time.	Read-only Auto calculated
Owned On	Calendar	Keeps the date and time information of the moment when Ticket was in the Owned status last time.	Read-only Auto calculated
Days Open	Text	This field shows the amount of days the Ticket has been in an Active Status. Active Statuses are New, Owned, Assigned and Test Fail.	Read-only Auto calculated
Reopened Times	Text	Tracks the number of times when Ticket was reopened.	Read-only Auto calculated

FIGURE 29 DESCRIPTION OF ALL TICKET FIELDS IN THE NEW STATUS

TICKET WORKFLOW

Certain workflows based on the status are applied to Tickets. The following diagram explains all possible transitions Ticket can undergo:

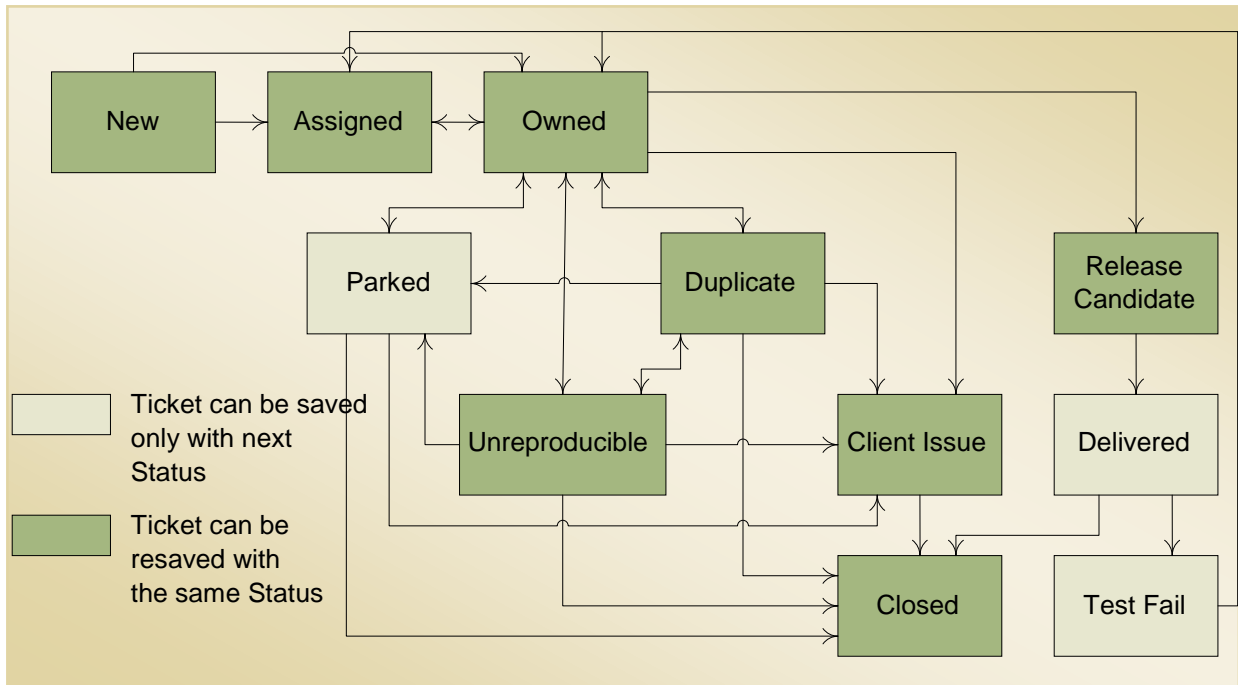


FIGURE 30 TICKET STATUS TRANSITIONS

As diagram explains, Ticket can be created with a *New* Status only. After that, it could be set to either *Assigned* to an Agent or Workgroup or *Owned* statuses. If a Ticket is in the *Owned* Status it means that the Customer's enquiry is currently being worked on. As such, *Owned* Ticket can only be changed to:

- *Parked* Status if no further action required
- *Duplicate* Status if the similar Ticket already exists
- *Client Issue* if the problem reported is not in the support SLA scope
- *Unreproducible* if not enough evidence of the problem were provided
- *Assigned* if for some reason manager decides to change the person responsible for Ticket resolution

- *Release Candidate* if resolution is available and awaiting for delivery to the Customer

Once work on the Ticket was completed and resolution is available then Ticket is placed into *Delivered* Status where it is tested/accepted and depending on the testing outcome goes to the *Closed* or *Test Fail* Statuses. If work on the Ticket was completed and resolution is not applicable, then a Ticket goes directly to the *Closed* Status from which it can be reopened with Status *New*.

QueWeb will calculate Ticket Status automatically while saving the record, if certain conditions apply:

1. If current Status is *Owned* and there is an Owner value that is not equal to the current User - the Status will be set to *Assigned*.
2. If current Status is *Owned* and there is a Workgroup set in Ticket - the Status will be set to *Assigned*.
3. If Active Status is not *Owned* and you are setting Owner name to yourself, the Status will be set to *Owned*. However, If you are setting the Owner name to someone else, the Status will be reset to *Assigned*. The Assigned person will get a notification and may Accept the Ticket by clicking **Accept Ticket** in the shortcuts menu or inserting their name in the Owner field. At that time the Status will become *Owned*.
4. If Active Status is not *Owned* and there is no Owner value but you selected a Workgroup then the Status will be set to *Assigned*. All members of this Workgroup will receive Notifications and a single member must then Accept this Ticket.

Depending on the Ticket' Status some other fields become required or are set to some values. The following table provides a summary of all such rules:

Status	Required Field	Calculated Fields
Assigned	Workgroup	Assigned On (Date)
		In Current Status Since (Date)
Owned	Owner	Owned On (Date)
		In Current Status Since (Date)
Delivered	Resolved in Build	Delivered Since (Date)
		In Current Status Since (Date)
Closed	Reason Code	Closed On (Date)
		In Current Status Since (Date)

TICKET EVENTS

Every time the Ticket changes its vital information an Event is captured. This is in addition to Audit, which captures all changes in the Ticket. Events are captured based on the following fields:

- Creation of New Ticket
- Status Changes
- Type Changes
- Impact Changes
- Priority Changes
- Owner, Agent, Workgroup changes

The Event Form can be used to look up read only Event information for a particular Ticket:

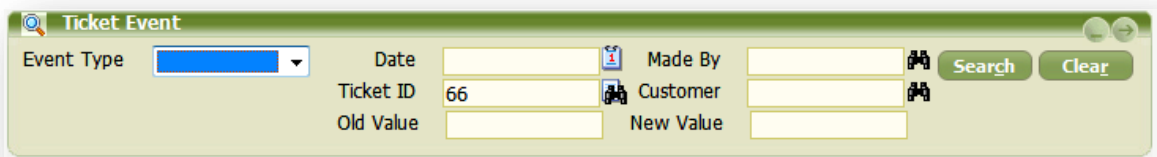


FIGURE 31 TICKET EVENT FORM

This Form is also useful when it is required to conduct a statistical and quality analysis of Ticket Events for a particular Customer. Select Customer's name in the Reference field and select certain types of Events and create Ad Hoc report.

ATTACHMENTS

Agents can use any file Attachments to link to Tickets or Solutions. Use this Form to look up existing attachments.

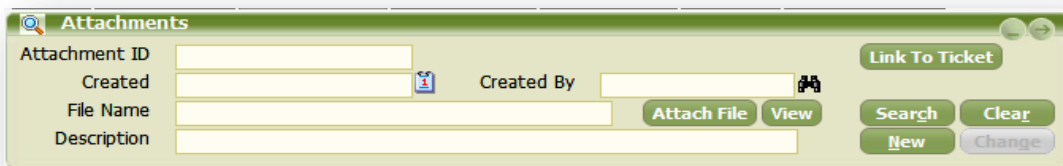


FIGURE 322 TICKET ATTACHMENTS FORM

Agents can also use corresponding buttons in Ticket and Solution to upload and link the required files to the Tickets. This is useful when you need to attach a certain screen image, section of the manual, etc. to the Ticket for future references.

ENVIRONMENT

When creating Tickets sometimes it is useful to specify the Environment in which the problem occurred. In order not to recreate the environment record every time the Ticket is created, QueWeb allows to create multiple Environment records once and link them to the Product and Organization combination instead. When the Ticket is created for this Organization and specific Product is reported – Agent can easily select from the predefined Customer Environment records. There are two fields in each Ticket where you can either specify **Reported** and **Tested** Environments. **Reported** Environment is where the problem has occurred and **Tested** is where you are testing it.

The image shows two identical web forms stacked vertically. The top form is titled "Reported Environment" and the bottom form is titled "Tested Environment". Both forms have a light green header bar with a search icon and window control buttons. Each form contains the following fields: "Config. Name" (text input), "Organization" (dropdown menu with a binocular icon), "Product" (dropdown menu with a binocular icon), "App. Operating System" (dropdown menu), "App. Hardware Platform" (dropdown menu), and "Description" (text area with a vertical scrollbar). To the right of each form are "Search" and "Clear" buttons.

FIGURE 333 TICKET ENVIRONMENT FORMS

TICKET ROLES

This Tab shows all people currently working on the Ticket: Agent, Owner or the Workgroup. While all three of these objects are displayed as Reference fields on the Ticket Form also, sometimes it is useful to see more information about the people working on the Ticket. Another way to do so would be to click on the binocular icon next to the Reference field and see more data displayed in the pop-up Reference Grid. However, this Form will quickly show you all people linked to the Ticket at the same

time. You can navigate to this Form by clicking on it in the Tab menu or Tree menu, or by clicking on any of the three reference fields' labels in the Ticket Form itself.

The screenshot displays three stacked forms in a light green and yellow theme. The top form, titled 'Workgroup', has fields for Name, Description, Notify Method, and Notify Address, with Search and Clear buttons. The middle form, titled 'Agent', has fields for Key, First Name, Title, Location, Phone, Webpage, Reach By, User ID, Last Name, Department, Site, Alt Phone, Pager, Notes, Employee ID, Full Name, E-mail, Building, Fax, and Mailstop, with Search and Clear buttons. The bottom form, titled 'Customer', has the same fields as the Agent form.

FIGURE 344 TICKET ROLES TAB

PRODUCT FORM

In this Form you can select the Product reported in the Ticket or look at more information about the Product linked to the existing Ticket.

The screenshot displays four stacked forms in a light green and yellow theme. The top form, titled 'Product', has fields for Name, Model number, Key, and Notes, with Search and Clear buttons. The second form, titled 'Component', has fields for Name, Description, and Product, with Search and Clear buttons. The third form, titled 'Reported build version', has fields for Build Name, Version, Product, and Notes, with Search and Clear buttons. The bottom form, titled 'Resolved build version', has fields for Build Name, Version, Product, and Notes, with Search and Clear buttons.

FIGURE 355 PRODUCT TAB

Note that when selecting a Product – the Component Form is constrained based on the specific Components linked to the Product. Same applies to the Reported and Resolved Builds. The last two Forms are primarily used by the software or IT development

companies; however you can use them without customizations to reflect the version or iteration number of your specific product.

ORG/CUSTOMER TAB

This tab provides information and allows linking a specific Organization and Customer to a Ticket. Because Customers belong to Organizations, selecting Organization will display only those Customers that belong to this Organization.

The image shows two stacked form windows. The top window is titled "Organization" and contains the following fields: Key, Parent Org, Region, Co. Code, Name, Description, Phone, Alt Phone, and Fax. There is a "Notes" field with a document icon. On the right side, there are "Search", "Clear", "New", and "Change" buttons. The bottom window is titled "Customer" and contains the following fields: Key, Organization, Last Name, Full Name, First Name, Department, E-mail, Title, Alt Phone, Phone, and Fax. There is a "Notes" field with a document icon. On the right side, there are "Search", "Clear", "New", and "Change" buttons.

FIGURE 366 ORGANIZATION/CUSTOMER TAB



MANAGEMENT FOCUS

Management Focus provides a facility to manage data and workflows for the following key objects in the QueWeb Customer Care system:

- Ticket
- Product
- Customer and Organization
- Workflow
- Knowledge Base

Access to Management Focus should be limited to Customer and Product supervisors, as well as shared by some Power Agents. Separate security access should be provided to the Knowledge Base management workgroups (Authors, Approvers and Publishers).



CUSTOMER MANAGEMENT

While Customer and Organization data can also be managed from the eService Focus by default, meaning that Agents will be able to change and create new Customer records, you may want to have a separate facility to maintain the Customer information. Depending on your operating procedures, you may want to give Agents only read-only capabilities in eService Focus and provide full capabilities to edit/create Customers and Organizations inside the Management Focus only. This makes sense for companies with predefined group of people who can be customers and make contacts.

ENVIRONMENT MANAGEMENT

Similar security measures can be implemented with Customer's environment records. You may provide read only access to Agents and manage Environment records and links to the Customer sites from the Management Focus only.

Notice that here is only one Form called Environment; however in Ticket you can see two Reference fields pointing to Tested and Reported Environments. The records that can be linked to Ticket in these two Reference fields are taken from the same Management Object Environment. Therefore, when creating new Environment records, you should create at least two different records per Customer and Product combination and call them correspondingly Tested and Reported Environments. Alternatively, if the Customer has many Environments per Product (i.e. staging, QA, production), you can

create as many as you need and link them all to the same Customer and Product pair. When Agents will create Tickets they will have a choice of selecting the appropriate Environment for each Ticket.



PRODUCT MANAGEMENT

In this Tab you can manage Products, its Components and Build Versions. Notice that as always in QueWeb, the parent Forms situated above the child Forms on the same screen. The workflow must go from top to bottom. First the Product is created, and then its multiple components can be created while for each Product you can also create multiple Build Versions.

As a rule in the Management Focus, you can choose to prohibit Agents from changing or creating new Products, Components or Build Versions and rely on Management workgroup to do so.



TICKET MANAGEMENT

In this Tab you can manage Categories and Sub Categories for the Ticket's classifications. Category and Sub Category are used when creating Tickets and are linked to each other: when Agent creates a certain Category – the list of available Sub Categories is based on the selected Category.

Therefore, when creating new Sub Categories, make sure that you fill in the correct Category in the Reference field.



WORKFLOW MANAGEMENT

This module allows setting up various workflow events as well as measures of its enforcement: notifications and escalations.

Let's start with the Allowed Status Transitions. QueWeb Open Source Edition allows maintaining dynamic transitions only for KB Solutions, even though you will see Tickets objects here as well.



FIGURE 377 ALLOWED STATUS TRANSITIONS

The system will ignore all records created for Tickets inside the Workflow. Please set the Object to Solutions when creating new Allowed Transitions records. Below you can select the From and To Statuses as well as indicate which Workgroups are allowed to make such Transitions.

For example, you can create the following Workgroups in order to manage Solutions publishing process for the Knowledge Base: Solution Authors, Reviewers, and Publishers. For each of these Workgroups, you can allow certain Status Changes; i.e. For Solution Authors you can allow only putting Solution in the Draft Status. So you would create a new record and while leaving the From Status Blank, you would fill in Draft as the To Status and fill in the Solution Authors Workgroup as allowed Workgroup for this transition. Similarly, you would enable Solution Reviewers to move Solutions from Draft to Reviewed Status only.

Using the QTask module, you can create a Task to move Expired Solutions into Retired Status, and correspondingly allow no Workgroups to do so manually. Furthermore, only Solution Authors can Move the Solution from Retired into Draft mode again.

If you need to allow multiple Workgroups to be able to change the same Statuses – you create one such record and then while it is filled in the Form, click New and change the Allowed Workgroup, click Save. This works in any Form in QueWeb, where you can use existing record as a template for new record. Note though, that in some Forms certain fields will be reset when using this method as appropriate.

TICKET NOTIFICATION MANAGEMENT

Using this Form, you can set up various Notifications to user, management as well as external people (Customers, Vendors, etc.)

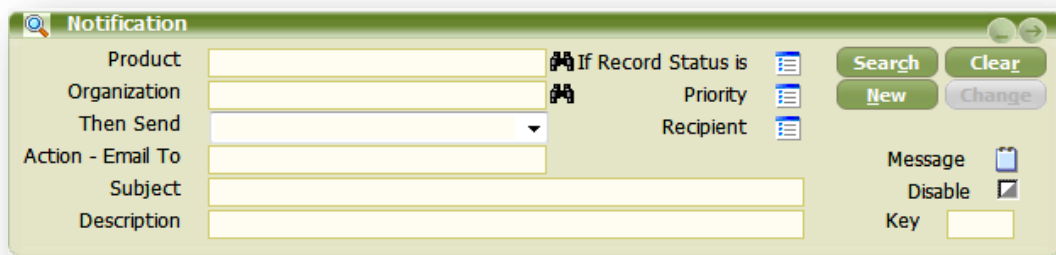


FIGURE 38 NOTIFICATION FORM

Notification Records essentially are templates which are monitored and applied by the system when a change occurs in a Ticket. If the change matched the conditions in

Notifications, the system will send a notification to predefined list of people or Ticket Roles, such as Owner, Customer, etc.

Notification Records can be created based on the following criteria:

- Product
- Organization
- Status
- Priority

Leaving Product and Organization fields blank means that the Notification will ignore this field and fire on any value in this field (for example if you need to create a Notification for ALL organizations – then leave the Organization field blank).

In order for the Notification rule to be triggered, Ticket Status needs to be modified (otherwise notifications might be sent on every ticket modification and it can result in unreasonably high number of messages). For this reason Status and Priority multiselect fields behave differently comparing to Product and Organization fields in the Notification rules. Notification Rules will evaluate to true only if Ticket Status (Ticket Priority) matches the selection in the corresponding field of the Notification Rule. So if Status or Priority fields are left blank, Rule will never fire.

Notifications can be delivered based on the two methods, which you can specify in the **Then Send** field:

- Alert – system message that will be delivered to My Queue screen of the recipient
- Email – will be sent via SMTP transport to recipient's email box. Should be used to send Notifications to external Customers who don't have access to the System

Subject and Message contents specified in the Notification will be used in the Subject and Body of the Notification email. You can quickly disable the Notification by checking the Disable checkbox without the need to delete the record.

Do not rely heavily on Alerts if you have people traveling without ready access to the Internet, instead you can forward the emails to their cell phone accounts.

You can select the following people to be notified in addition to writing a predefined email address list:

- Customer - Only Email Notification will be sent out
- Workgroup – System will determine the preferred transport according to the Workgroup setup
- Owner – System will determine the Notification transport according to “Then Send” field
- Agent – System will determine the Notification transport according to “Then Send” field
- Use Email Address Specified in the Notification “Action – Email To” field

You can create identical Notifications but with different combinations of Recipients and delivery methods to ensure everybody will receive the Notification in a most convenient location.

To ensure effectiveness of Notifications and readability by the recipients, you can specify special tags, which will be used during the Notification execution time. A tag is an object field name, written in <> brackets. System will parse these names during the run time and replace the tags with the actual data from the Ticket. For example, you can place in the Subject or Message of the Notification the following text: “Ticket <qw_ticketid> has been created”, where <qw_ticketid> is the tag which will be replaced with the actual Ticket ID number.

TICKET ESCALATION MANAGEMENT

Escalations are similar to Notifications, but here you can use time dependency.

Notifications are sent immediately based upon a Ticket meeting certain predefined conditions. In addition to the same criteria used in Notifications, Escalations can be sent based on a Boolean Status conditions, such as “**Not Closed**”, “**Not Assigned**” or “**Not Updated**” and time elapsed since the current state of the Ticket. Product Filter field can be used constraining the product when applying Escalation rules.

FIGURE 39 ESCALATION FORM

In addition to same Recipient options as used in Notifications, you can specify any Employee or a Workgroup as a Recipient of Escalation. Furthermore, by checking the Repeat checkbox, you can specify that Escalations continue be sent (or Fired) every time the same time interval passes as long as the original conditions that triggered escalations still exist.

In some cases you can create chains of Escalations: use the same conditions to create multiple Escalation records, but use increasing time elapsed for each new record to fire and use higher ranking Employees as Recipients. This will ensure that as time progresses and the Ticket will require more and more urgent attention, appropriate people will be notified accordingly. As soon as the Ticket is changed in a way that the original conditions are not met anymore, the Escalation will be reset and no more messages will be sent.



KNOWLEDGE BASE FOCUS

Knowledge Base (KB) is a collection of various Solutions that can be used to resolve Customer inquiries and Tickets. Knowledge Base in QueWeb is tightly integrated with Tickets and allows for quick and efficient Ticket resolutions.

KB keeps track on statistics of using Solutions and thus provides an analysis data on their effectiveness. You can schedule a frequent review of Solutions that are underperforming by looking at the corresponding Ad Hoc report, and rewriting them.

WORKING WITH SOLUTIONS

As described in the Workflow Management chapter of this Guide, you should already have set up the Solutions workflow. Agents are usually granted a read only access to the KB Focus or Agents can be added to Solution Authors group and can utilize it freely to

create Draft Solutions and link published Solutions to Tickets. The more Agents use KB to diagnose, troubleshoot and resolve Tickets, the more effective the KB becomes.



FIGURE 40 SOLUTION FORM

Agents can also use Attach File button in order to create file Attachments to the Solutions. This is useful when Solution contains a reference to the Guide or a Manual or an image explaining how to resolve a problem.

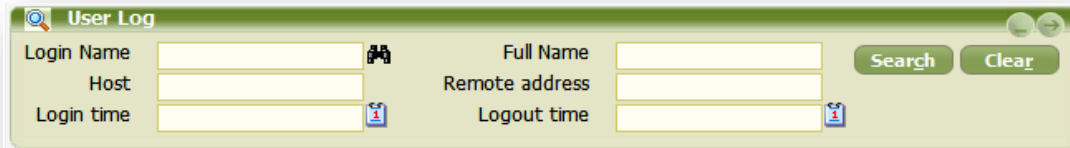
While working with the Ticket in edit mode, Agents can type in the problem text into the Solution Reference field on the Ticket Form and click the binoculars button. This will produce a quick search inside the similar problems already recorded in KB. If none can be found, an Agent can click on the Solution field label and transfer to this Form inside the KB Focus. Here, Agent can perform more detailed searches and once the Solution is found or a new one is created it can be linked to the Ticket. If creating a new Draft Solution, an Agent should return to the Ticket when the Solution is approved and published and link it to the Ticket.

Solutions are tracked in Audit. Agents can also quickly see how many times the Solution was used in Tickets.

LOG FOCUS

Log Focus is used for reviewing and troubleshooting of the Application operations. It consists of three Tabs represented below.

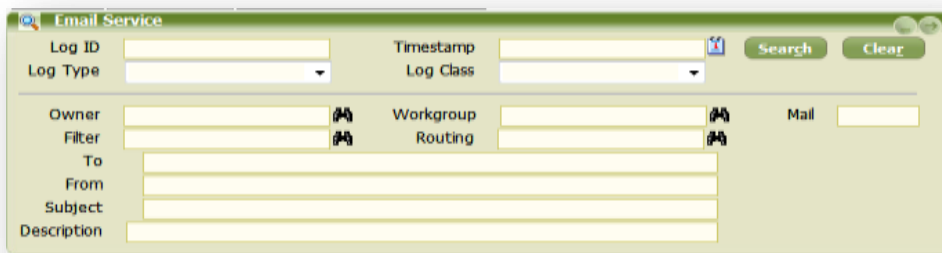
In the User Log you can trace all users currently logged into the system, their location and how long they have been working in the system.



The User Log window features a search interface with the following fields and controls:

Login Name	<input type="text"/>	Full Name	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
Host	<input type="text"/>	Remote address	<input type="text"/>		
Login time	<input type="text"/>	Logout time	<input type="text"/>		

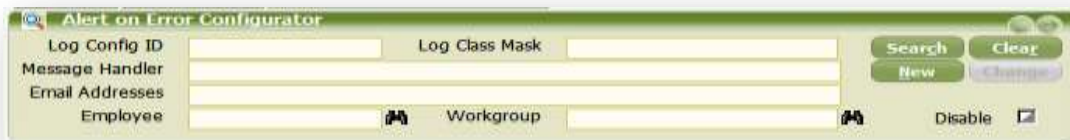
Email Service Tab provides logging information for the Email services. It can display several levels of the log: Error, Warning, INFO and DEBUG.



The Email Service window includes the following search and filter fields:

Log ID	<input type="text"/>	Timestamp	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
Log Type	<input type="text"/>	Log Class	<input type="text"/>		
Owner	<input type="text"/>	Workgroup	<input type="text"/>	Mail	<input type="text"/>
Filter	<input type="text"/>	Routing	<input type="text"/>		
To	<input type="text"/>				
From	<input type="text"/>				
Subject	<input type="text"/>				
Description	<input type="text"/>				

The Alert on Error Module can be configured to email notifications of any errors in QueWeb system to administrators. It comes preconfigured out of the box to capture all errors in the system; you can insert your administration email address there.



The Alert on Error Configurator window contains the following configuration fields:

Log Config ID	<input type="text"/>	Log Class Mask	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
Message Handler	<input type="text"/>			<input type="button" value="New"/>	<input type="button" value="Change"/>
Email Addresses	<input type="text"/>				
Employee	<input type="text"/>	Workgroup	<input type="text"/>	Disable	<input type="checkbox"/>

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