

Service Express

Site User's Guide

Your Company Information Here

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Introduction

This document is meant to be the template for instructions on how to use your customized and configured Service Express site. Screen shots should be replaced, as well details about what ticket types are and ticket problems are available.

This document was written to inform the consumer of the use of the Service Express web application.

This web application provides a help desk ticket taking system. Your issues are recorded on a ticket so that it can be identified and worked on by multiple people.

Other documents available are:

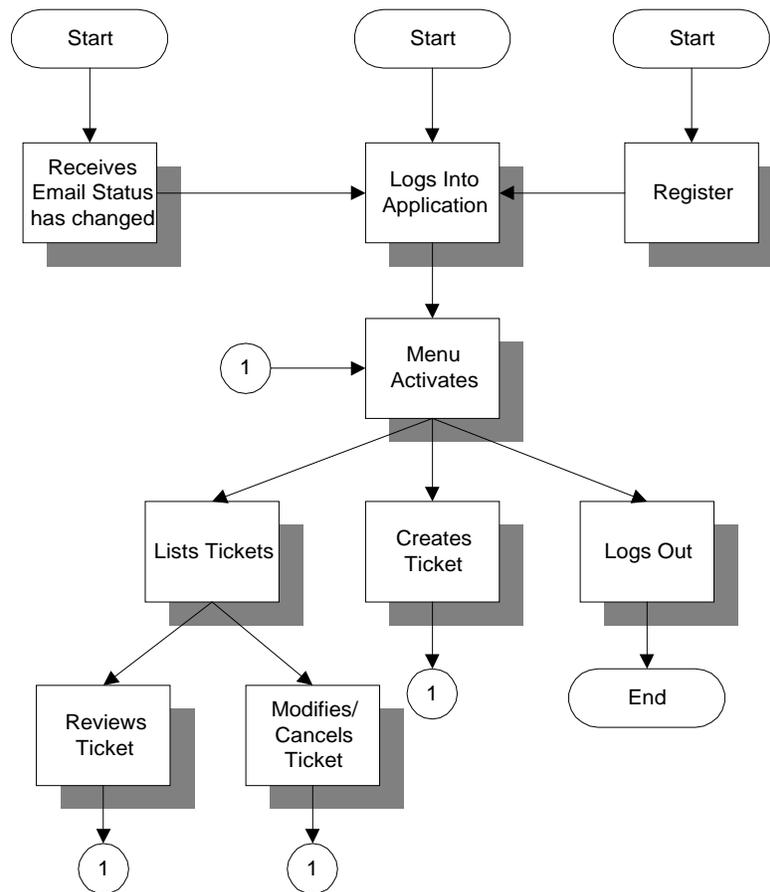
- Installation of Service Express
- Configuration of Service Express
- Process Guide for Service Express

Service Express Created by
Amduus Information Works, Inc.
<http://www.amduus.com>

General Use of the Site

This section provides a general overview in the use of the application. More detailed instructions in the use of the application are provided later in this guide. This section will help you understand the application in a general way to better understand the intent of the more detailed instructions.

Below is a flow chart of the most usual uses of the application.



There are three main starting points for entering the application. These are based on if you are not a registered user, are a registered user going through the universally known URL, or a registered user with a ticket whose status has changed¹.

If you are not a registered user, you will need to register with the application so it can track which tickets are created by you, as well inform you of changes to the status of tickets. You will be

¹ Some implementations of the application may not have this feature turned on.

asked some basic information about yourself. Some information is optional, other information will be required. Completion of this step will make you a registered user of the application.

A registered user can then log into the application through a universally known URL. The application will issue a screen asking for your email address and a password challenge.

If the registered user has received an email with a ticket URL, then clicking on that URL will automatically log the user in. The assumption is that your email is secure, and so no login is required. Note that forwarding this email to others will allow others to click into the application with the same URL and access as yourself. Note that entering the application in this way will also by-pass menus and direct you to the ticket screen immediately.

Once the password challenge has been successfully completed, the registered user will then have a menu of activities they can perform on the site for their tickets. These activities include: creating a new ticket, listing tickets, searching tickets, and modifying tickets.

Almost all other activities are based on the creation of a ticket, so let's first look at this process. The user will click on the Create Ticket button/link on the menu presented in the web page. An input screen will appear allowing the user to enter information about their issue.

The configurations of the application will have a set of ticket types and problem types available. You will need to choose the appropriate ticket type and problem type for your issue. These inputs allow the application to automatically route your ticket to someone who will know how to deal with those issues. You will also have the ability to enter additional information in your own words to more fully explain the problem you are having.

Once the ticket is submitted to the system, you will be presented a summary of your entries which includes the ticket number. This number will be important to remember if you choose to interact with the company outside of the application. This page is also formatted so you can print it out for your own records.

Once you have one or more tickets within the system, you can use the other activities of the application.

By clicking on the List Tickets button/link in the menu, you will be able to list the tickets you have created as well their current status. By clicking on the hyperlink under the ticket number, you will be brought to the ticket summary screen. One can also use the ticket search feature to pull up a ticket based on your search entries².

² Note this function may not be implemented in your installation of the application.

Once you have reached the ticket summary screen via the listing or search features of the application, you may review or update the ticket with additional information.

You will always be able to review the information on the ticket. If the ticket has reached a status of closure, you will not be able to update or modify the ticket in any way.

When you are finished working with the application, it is suggested that you log out of the application. This provides you some privacy should some use your web browser in the future.

Detailed Instructions

The following sections provide more detail about the activities discussed in the preceding section. They will include screen shots³ and more detailed step by step instructions.

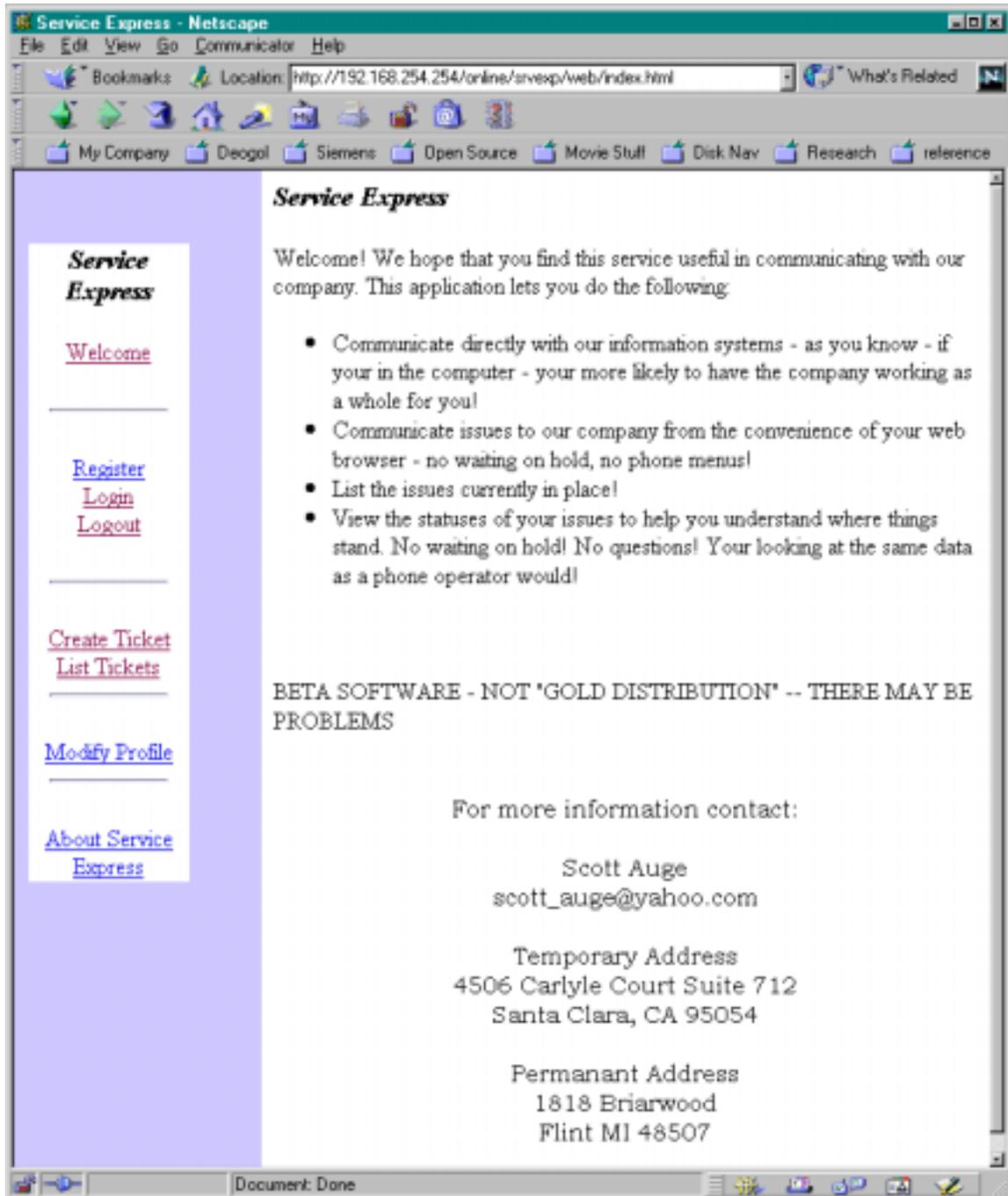
Accessing the Universally Known URL

There are two URLs that will allow you to enter the application. One is the universally known URL that provides the user ID and password challenge. The other URL (ticket URL) allows direct access to the application from a status change email. This section details accessing the application from the Universally Known URL.

One would direct the browser to the Universally Known URL. This can be obtained from the people who set up the application. It could also be a hyperlink for a company directory of web sites internally or external to your company.

Upon accessing the site, you will be presented the following screen:

³ The application is customizable in terms of look and feel – these screens may appear different in your use, but the same basic information and functionality will be available.



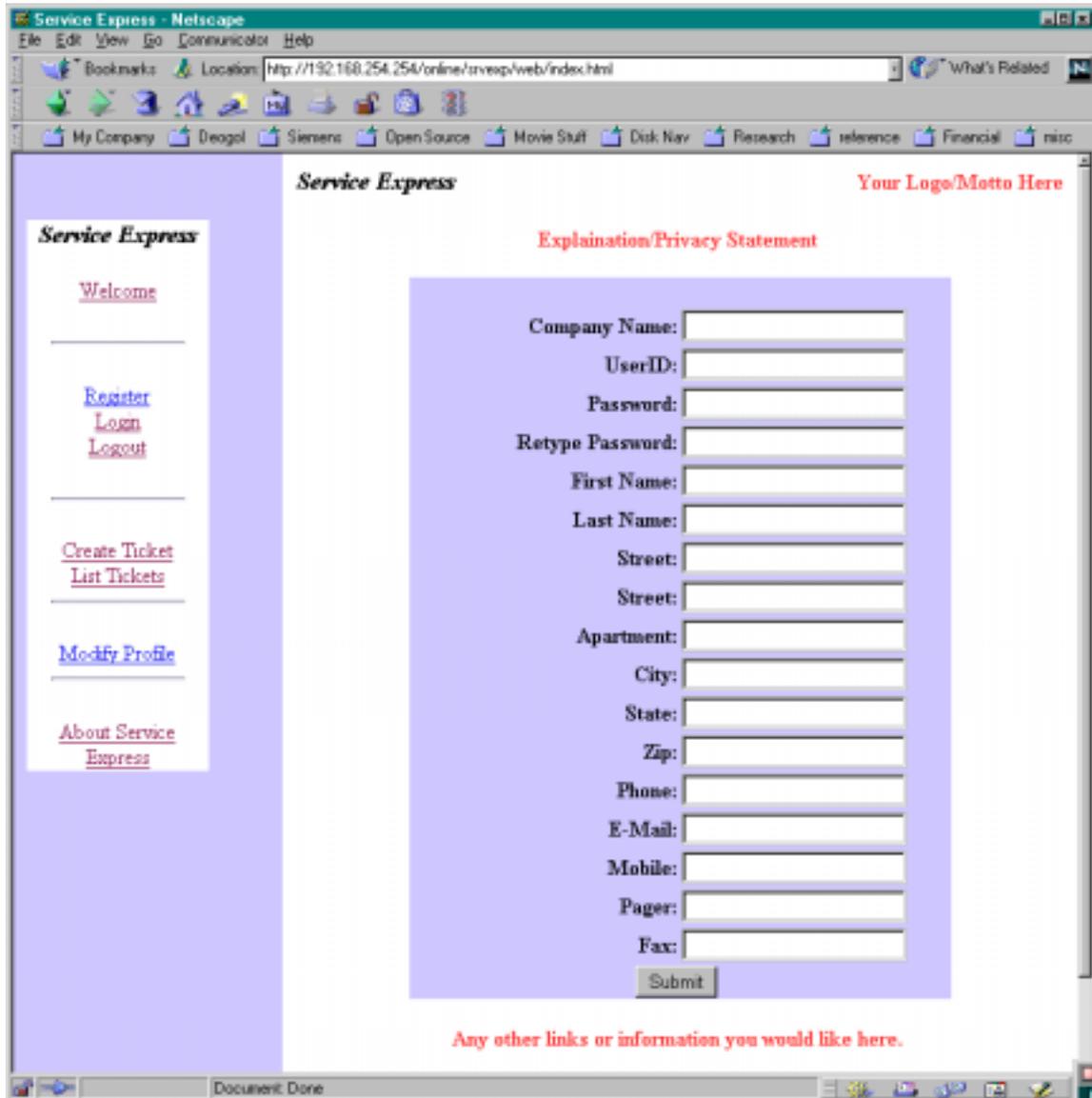
If you have a user ID already created, you would immediately go to the Logging In section of this document. If you have not created a user ID, that will be your first step and you should continue reading in the “Creating a User Identification” section.

The only menu items that will function will be Register and Login. No other menu items will work until the application knows who you are.

Creating a User Identification

In order for the application to differentiate your tickets from other people's tickets, it needs to know who you are. This is done in the registration section of the application. All information is recommended to be entered, but the application really only needs to know the UserID, Password, and Retype Password entries.

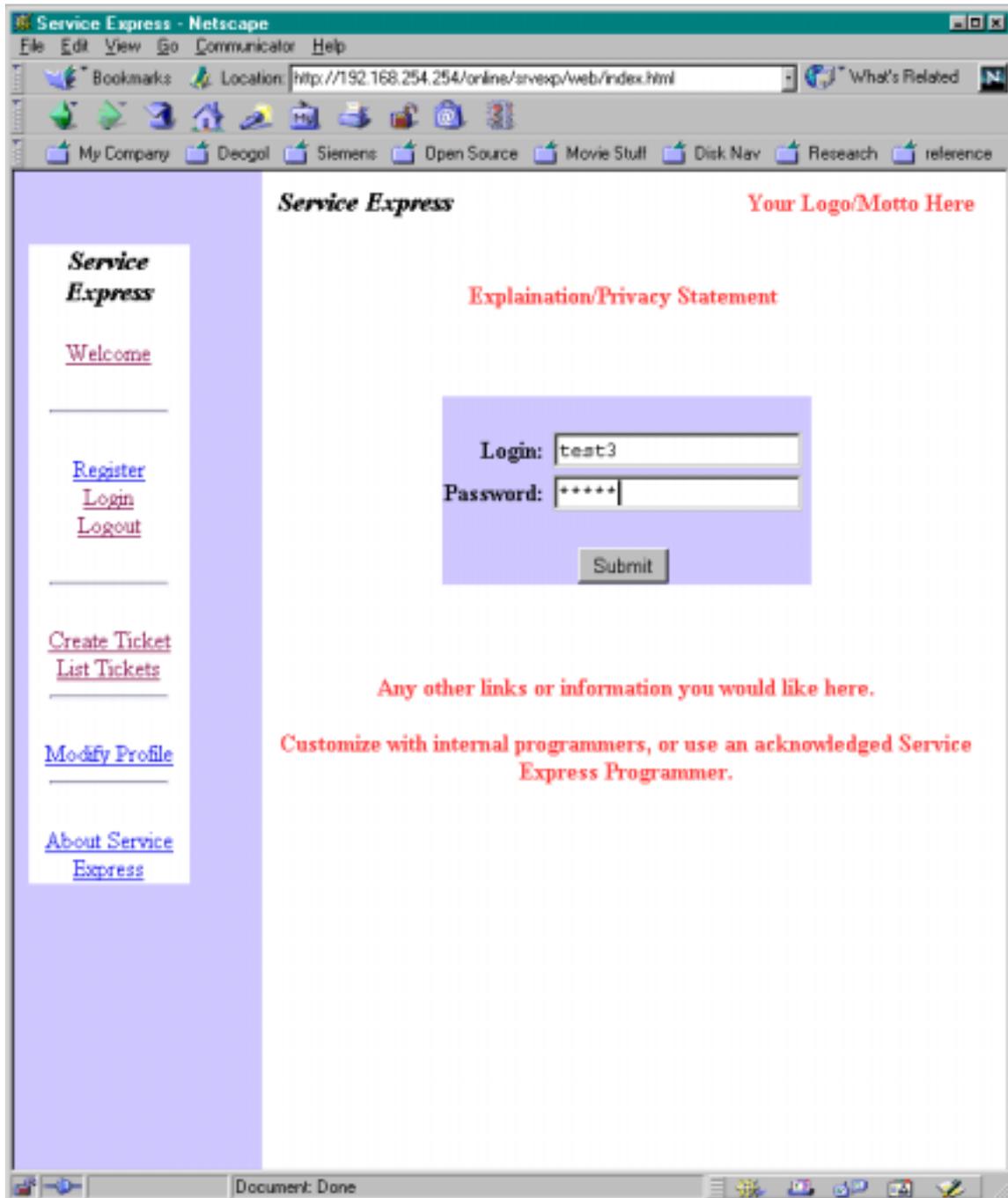
The optional information will help the company you are interacting with to know who you are in terms of your postal address and contact information. These items will automatically be attached to the tickets you create with the system.



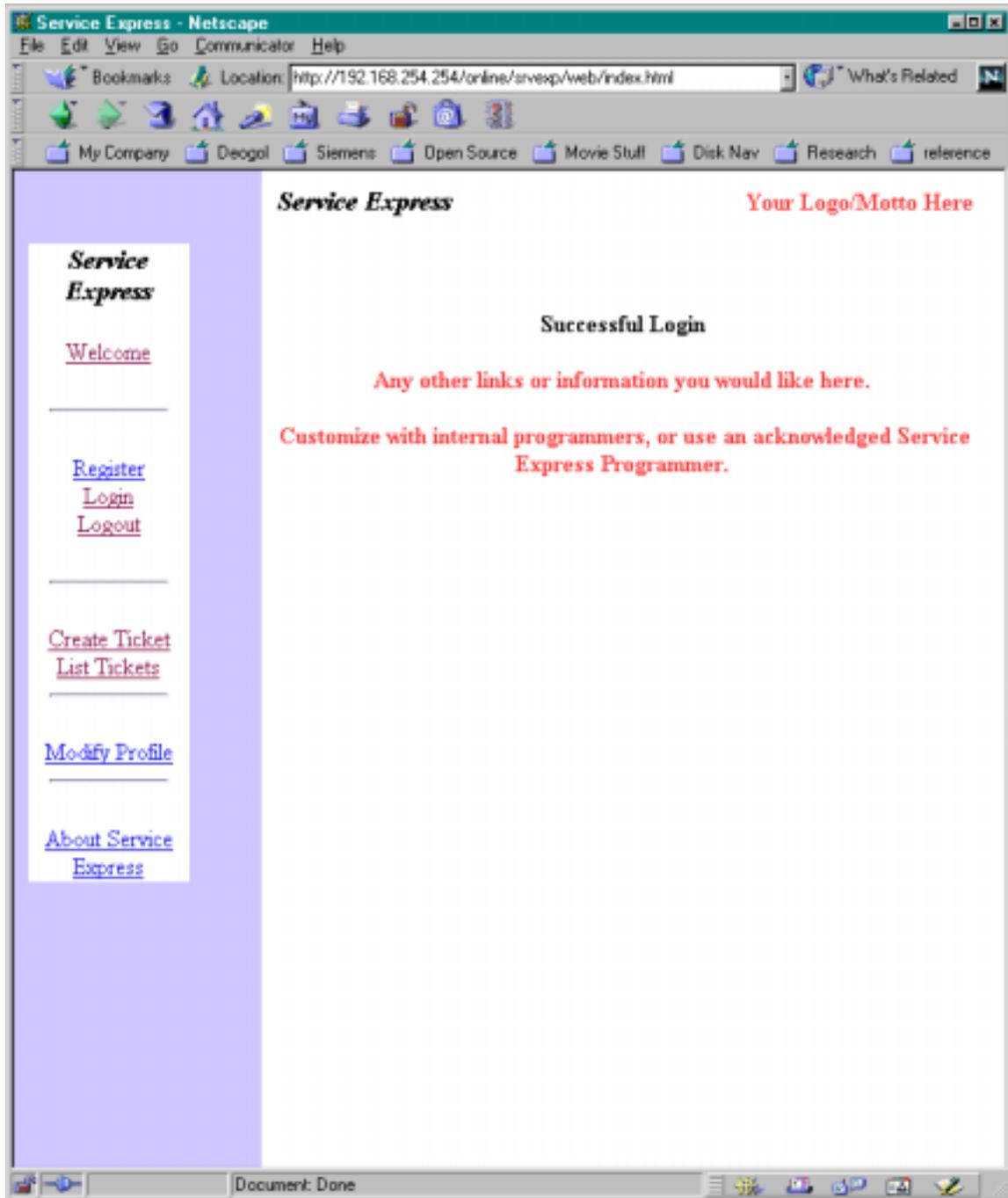
The screenshot shows a Netscape browser window titled "Service Express - Netscape". The address bar displays "http://192.168.254.254/online/trveep/web/index.html". The browser's toolbar includes "File", "Edit", "View", "Go", "Communicator", and "Help". Below the toolbar are "Bookmarks" and "Location" fields. The main content area is divided into two sections. On the left, a vertical sidebar contains the following links: "Welcome", "Register", "Login", "Logout", "Create Ticket", "List Tickets", "Modify Profile", "About Service Express", and "Express". The main content area is titled "Service Express" and "Your Logo/Motto Here". Below this is a section titled "Explanation/Privacy Statement" which contains a registration form. The form fields are: "Company Name:", "UserID:", "Password:", "Retype Password:", "First Name:", "Last Name:", "Street:", "Street:", "Apartment:", "City:", "State:", "Zip:", "Phone:", "E-Mail:", "Mobile:", "Pager:", and "Fax:". A "Submit" button is located at the bottom of the form. Below the form, there is a red text prompt: "Any other links or information you would like here." The browser's status bar at the bottom shows "Document Done".

Logging In

Once you have become a registered user, you will need to log into the application. This can be achieved by clicking on the Login link in the menu section of the web page. You will need to enter your Login and Password as created in your data in the registered user page.



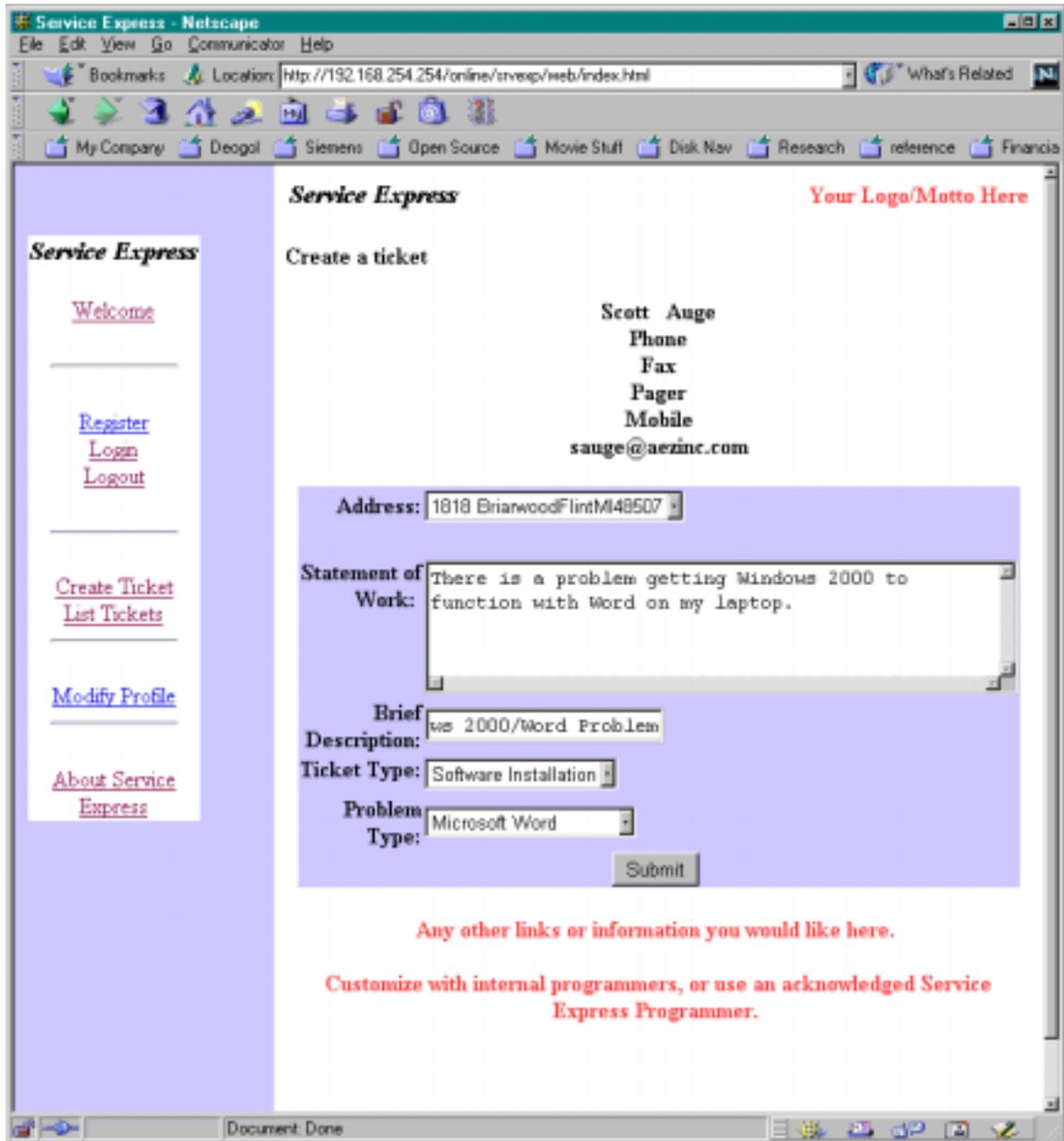
Upon a successful login, you will see the following page:



Seeing this page means that the other menu items are now available for your use.

Creating a Ticket

This is the main activity of this web site – to inform the company of some problem or issue you are having. By clicking on the Create Ticket link on the menu, you will be presented with the following screen:



If the system has multiple addresses⁴ for you, you will have the choice of which address the ticket will be associated with.

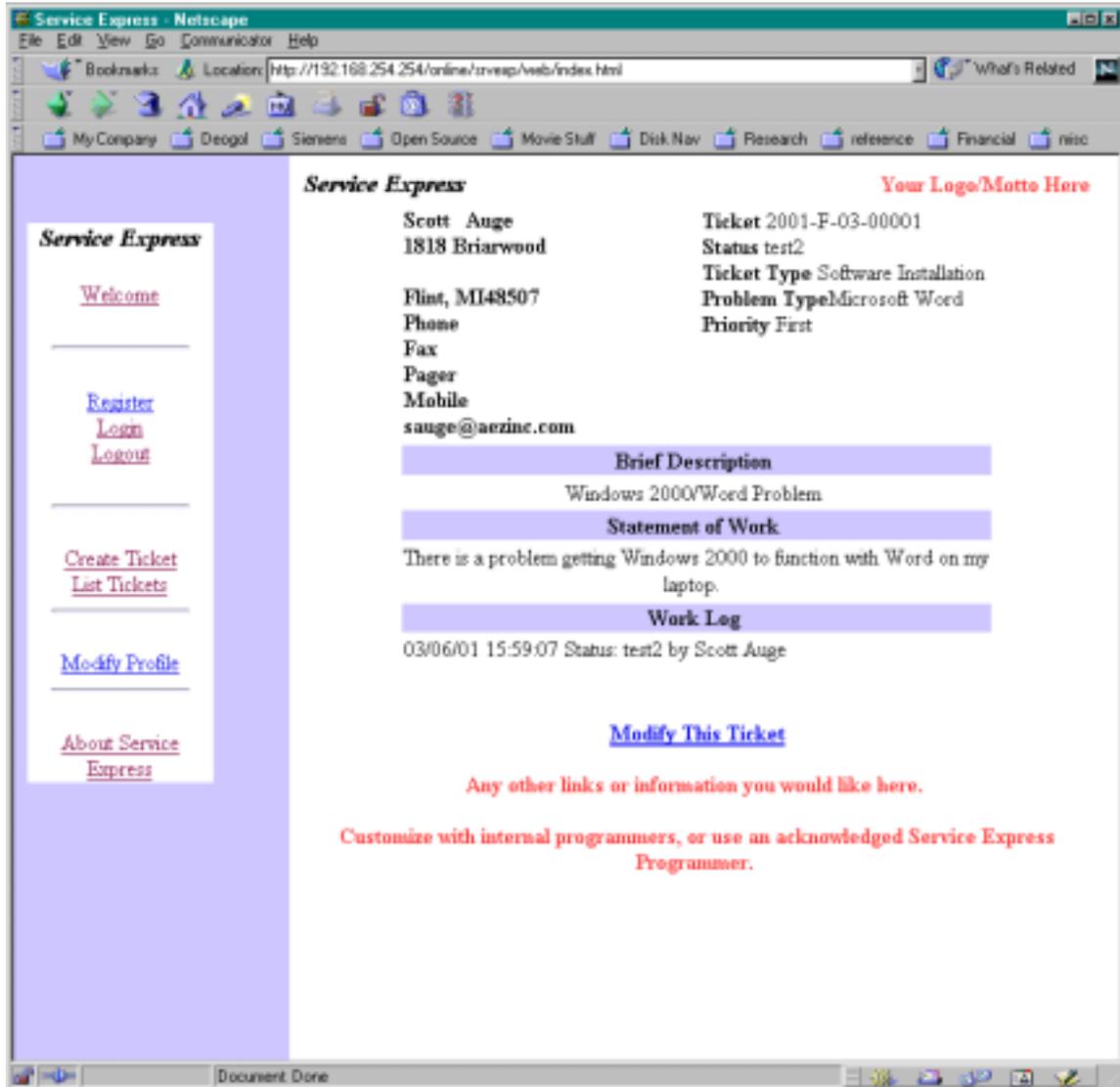
The ability to enter a description of the problem in your own words can be provided in the multiline text box.

A brief description is the title of the ticket as shown in your ticket listing.

⁴ As an example, the ticket is about equipment of some sort, located in different parts of the country.

The ticket type is part of the routing process for your ticket. Within the company there are different people to handle different types of interaction with the company. Some example ticket types⁵ might be: equipment failure, help call, invoice dispute, sales question, etc.

Once the subject of interaction is described, the problem/issue can be described. This is the purpose of the Problem Type. Some examples⁶ could be: installation, breakdown, etc.



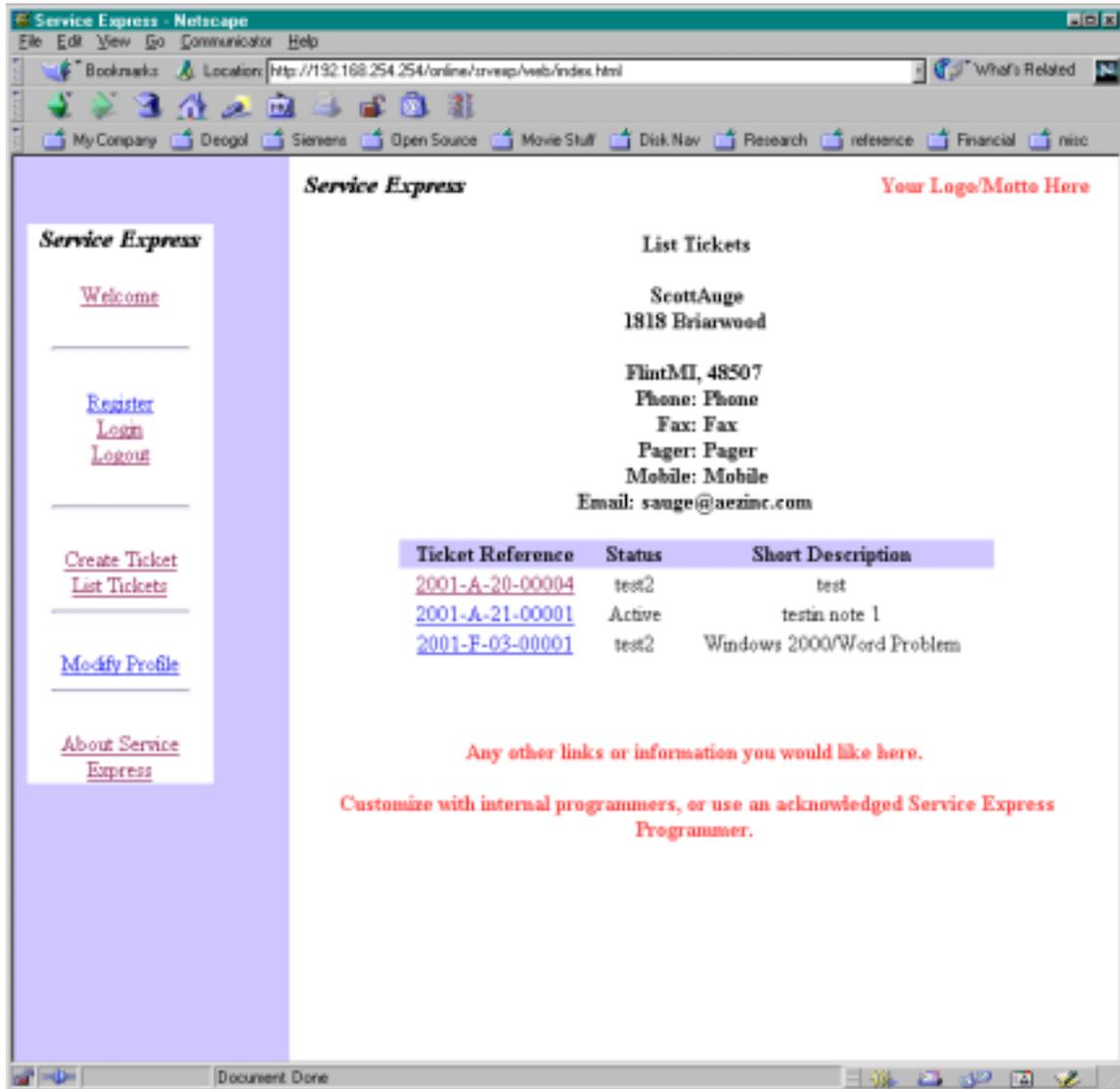
⁵ Ticket types are set up by the company you are interacting with, so it is very likely these examples may be more detailed in actual use.

⁶ The problem types are set up by the company you are interacting with, so it is very likely these examples may be more detailed in actual use.

Upon clicking Submit, your ticket will be created. In the upper right hand corner is the Ticket Number that is used to identify the issue and thereby the appropriate person to talk with.

Listing Tickets

A screen is available that will allow you to list all your tickets in the system. It is accessible by clicking on the List Tickets hyperlink in the menu section of the web page.

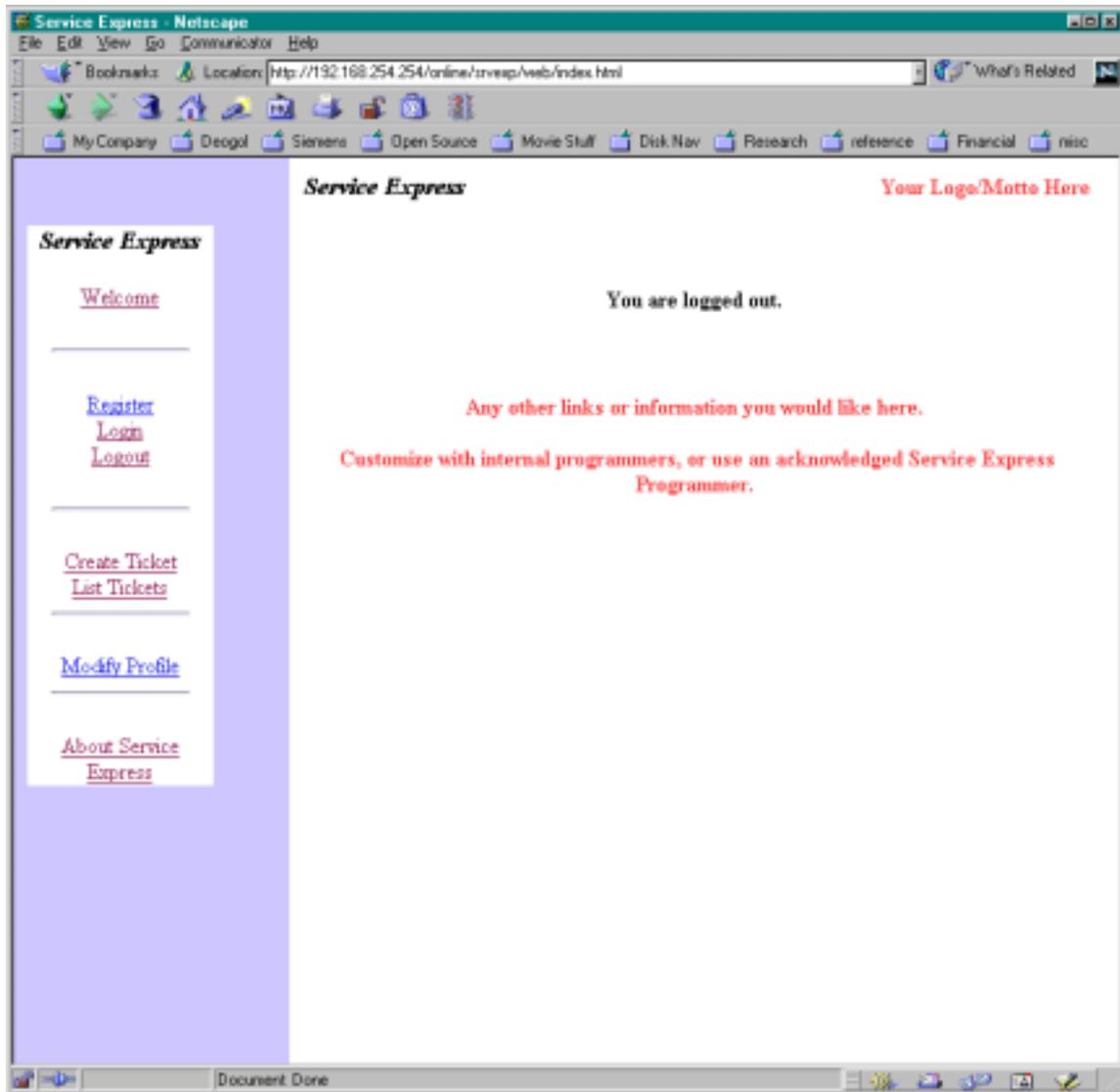


Modifying a Ticket

Modifying an existing ticket requires you follow the same steps as for viewing a ticket. When on the screen with the ticket summary, you will see the hyperlink Modify This Ticket. If the ticket can be modified, you will be presented with a screen very similar to the ticket input screen.

Logging Out

Logging out of the application is important. This is so that your browser or computer cannot be used to access your data without your permission.



Upon seeing the above screen, you will be logged out of the application.