

Service Express

Training Manual

Amduus Information Works, Inc.

<http://www.amduus.com>

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Introduction

This is the training guide for the Service Express Web Application from Amduus Information Works, Inc. It will cover the use of both the internal web site and the external web site. There is a training guide available for the company implementing Service Express to share with their customers to use the external web site.

The document is broken into two parts. The first part deals with the internal web site. The second part deals with the external web site (and is the basis for the training document for the external user base of the application.)

This document assumes that the application has been set up and available to a web browser.

Documentation regarding the installation and configuration of the application, web server, database server, application server, firewall, networking, and other such middleware/hardware is covered else where.

Notes about the Architecture

Service Express aids the company implementing it with creation, tracking, and handling of issues defined by that company. Issues are referred to as “tickets” in the document.

Service Express is a web application, which means it is a full blown application with functionality and a database backend. Instead of using a GUI interface to interact with the user, it uses a web interface. This means Service Express is multi-tiered application. One tier would be the web browser used by the user of Service Express. The second tier would be the web server handing accesses to the web site. A possible third tier would be a machine holding the application server that creates the web pages based on programming and database interaction. The possible fourth tier could be a machine holding the database server used by the application to store and manipulate data. Service Express can be run on as many as one machine to n machines, depending on the amount of transactions it must process.

There are two web sites associated with the application. One, referred to as the “external web site” is used by the customers of the organization using this application. If it was building maintenance implementing Service Express, the external site’s users would be the building’s residents. If it was a company implementing Service Express, the external site’s users would be the customers of that company.

The other is referred to as the “internal web site.” This is the web site used by the people responsible for handling the issues created by the users of the external web site. Users of the internal web site can also create issues in case they are phone oriented.

The following web browsers can use Service Express without incident:

- MS Internet Explorer on Windows Platform
- Netscape on a Windows Platform
- Netscape on a UNIX Platform
- Mozilla on a Windows Platform
- Mozilla on a UNIX Platform
- Opera on a UNIX Platform

Part I The Internal Web Site

Getting Started With Configuration

Service Express can be a powerful tool for handling issues for the users. In order to be powerful, it requires configuration regarding the processes used by the organization to resolve issues provided to it.

Determining Ticket Strategy

Service Express can be used to handle multiple types of issues. It is up to the application configuration specialist to work with the organization implementing the software to determine the types of issues it will be used with. Some example organization's and their issues are described below:

IT Department
Software Related
Internet Related
Network Related
Other

Sample Ticket Types for an IT Organization

Apartment Building Maintenance
Apartment Related
Grounds Related
Security Related
Financially Related
Other

Sample Ticket Types for a building maintenance organization

Associated Company Internal Operations
Administrating Phones
Administrating Security
Human Resources
Other

Sample Ticket Types for an organization's internal processes

Once can set up ticket listings for internal users to reflect only the ticket types they are interested in seeing. So if certain people are oriented to handling only one type of interaction, such as handling network problems, they will only see tickets of that interest in their listing screen.

Of each ticket type, there are associated “problems.” (Though, it might not actually be a problem, but more of an “action item” for the ticket handler to perform.) These can be considered sub-categories for ticket issues. For example:

Apartment Building Maintenance – Apartment Related
Broken Door
Broken Kitchen
Broken Wall/Structures
Broken Garage Door
Other

Sample Problems associated to an Apartment Ticket Type

IT Department – Software Related
Need Software Installed
Need Software Un-installed
Cannot run package X
Cannot run package Y
Other

Sample problems associated with an IT departments Software Ticket Type

Once can set up ticket listings for internal users to reflect only the problems they are interested in seeing. So if certain people are oriented to handling only one type of problem, such as handling apartment grounds problems, they will only see tickets of that interest in their listing screen.

In order to work through a problem, one usually needs to work through various steps of the problem. Each one of these steps can be referred to as a Status. Some status's may represent a particular step in the process such as “In Transit.” Other Status's may act as a form of communication between the ticket requester and the ticket handler such as “Cancel.” Status's can represent a “workflow” for the ticket to flow from person to person related to a particular operation.

Apartment Building Maintenance – Apartment Related – Broken Garage Door Statuses
Opened
Office Aware
Problem Verified
Ordering Parts
Fixing Problem
Garage Door Repaired
Cancelled
On Hold

Sample Statuses for repairing a garage door

Once can set up ticket listings for internal users to reflect only the status they are interested in seeing. So if certain people are oriented to handling only one action, such as dispatching a repair person, they will only see tickets of interest to themselves.

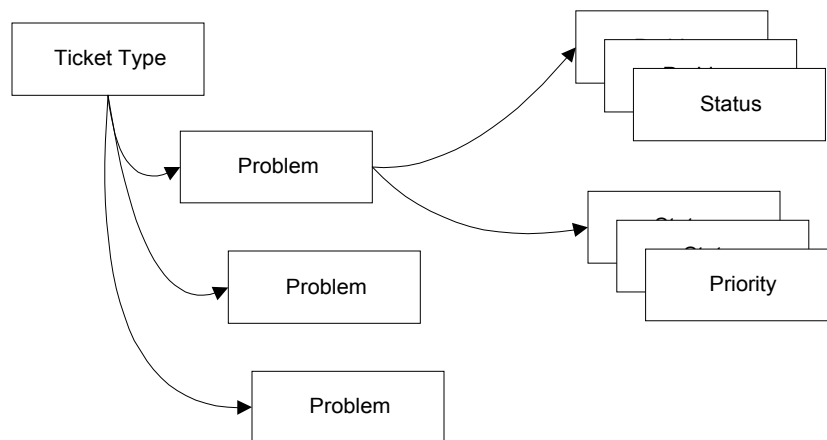
Certain problems may have a higher priority to being fixed than others. Priorities can be numeric or name oriented. Ticket priorities can be changed by an internal user to aid sequencing which issues should be handled before other issues.

Apartment Building Maintenance – Apartment Related – Broken Garage Door Priorities
One
Two
Three

Sample Priorities for a broken garage door

Once can set up ticket listings for internal users to reflect only the priority they are interested in seeing in relation to a problem. This can also aid with service organizations having multiple levels of aid for a problem. One priority might be “Tier One Support,” while another might be under “Tier Two Support.”

Below is a diagram showing that for a given ticket, there are multiple possible problems/action items. For each problem/action item, there are multiple statuses and multiple priorities associated to that particular problem/action item.



Relationships between ticket types, problems, statuses and priorities

It is the combination of ticket types, problems, priorities, and statuses that can be used to categorize a ticket to a group of people to work on. See “Adminstrating Ticket Listings” further below.

Customer Set Up Strategy

Service Express can be used with multiple user organizations (such as customer companies of the implementing organization) with multiple customer users, or a single user organization (such as the internal use by an organization) with multiple users.

For a given customer, there are these entities:

- The main customer/organization information
- Sites of work for the customer/organization
- Contacts for the customer/organization

The main customer/organization is represented by a name and a customer number. For an organization implementing the system internally, there would only be one customer – the organization it’s self. For an organization implementing the system externally, there would be more than one customer (assuming the company implementing the system has more than one customer!)

Associated to each customer would be work locations for the ticket. Ticket work locations are geographically oriented in Service Express with address information. One can also use the address information to represent departments or buildings within the organization.

Also associated to each customer is a ticket contact. This involves such information as name, phone, fax, email, etc.

Application Configuration

Creating an initial Internal User

Before any configuration can be done, an internal user must be created. In order to create an internal user, you should follow these steps:

- Obtain the authorization code for your site from Amduus Information Works, Inc. or your application administrator.
- Access the web site using the CreateInternalUser.html web page as shown below:

The screenshot shows a Microsoft Internet Explorer window titled "Create Internal User - Microsoft Internet Explorer". The address bar displays "http://amduus2/online/srvexpadm/adm21/CreateInternalUser.html". The page content includes a welcome message, instructions, and a form with the following fields:

- Authorization Code:
- User ID:
- Password:
- First Name:
- Last Name:
- Email:
- Phone:
- Cell:
- Fax:
- Address1:
- Address2:
- City, State:
- Zip Code:

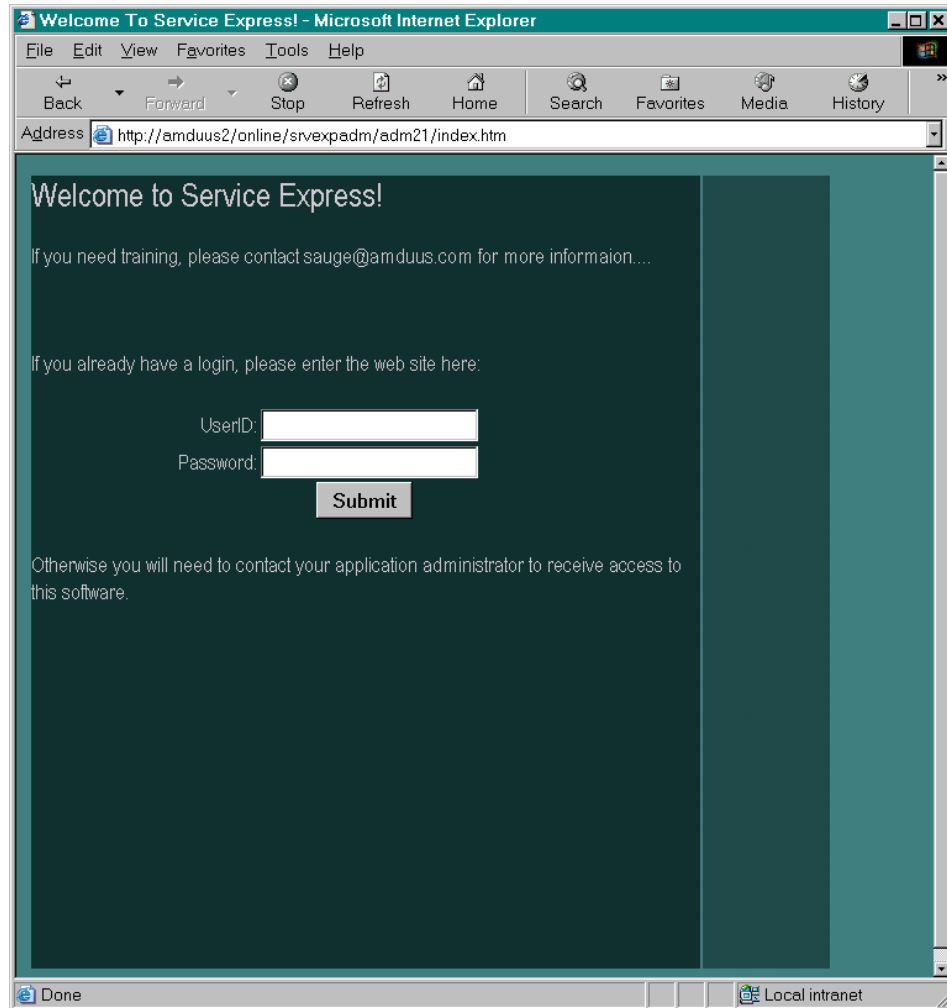
A "Submit" button is located at the bottom of the form.

- Enter the given authorization code. You will not be able to create an internal user without the code.
- Enter the user id the user will log into the application with. Examples might be "sauge" or "scott.auge" or "45362."
- Enter the password this user will use to gain access to the internal application.

- Enter any associated contact information for this user.
- Press Submit.
- You now have an internal user.

Logging into the internal web site

Once an internal user has been created, a person can enter the internal web site from the login page as shown below:

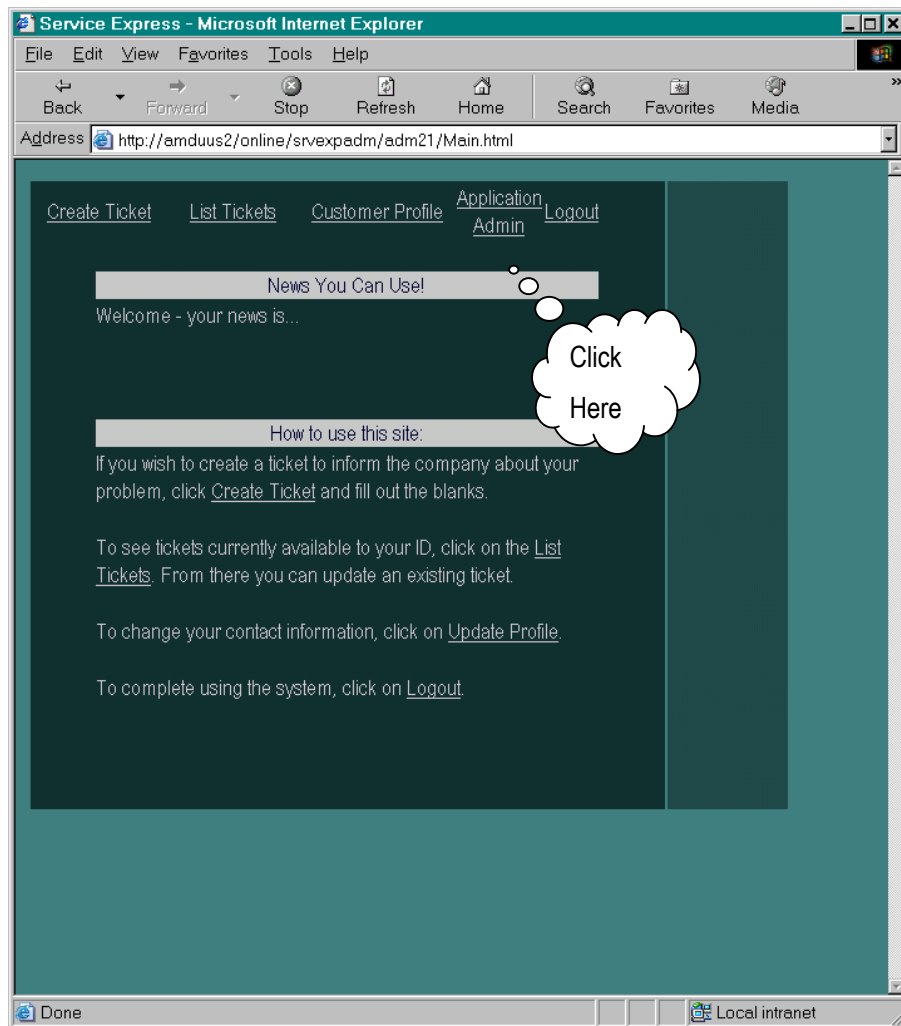


- Access the web site using the administration based link to the index.html file.
- Enter an internal user's ID and password. External users will not be allowed into the internal user's web site.
- Press Submit.
- You should be in the main page for the internal web site.

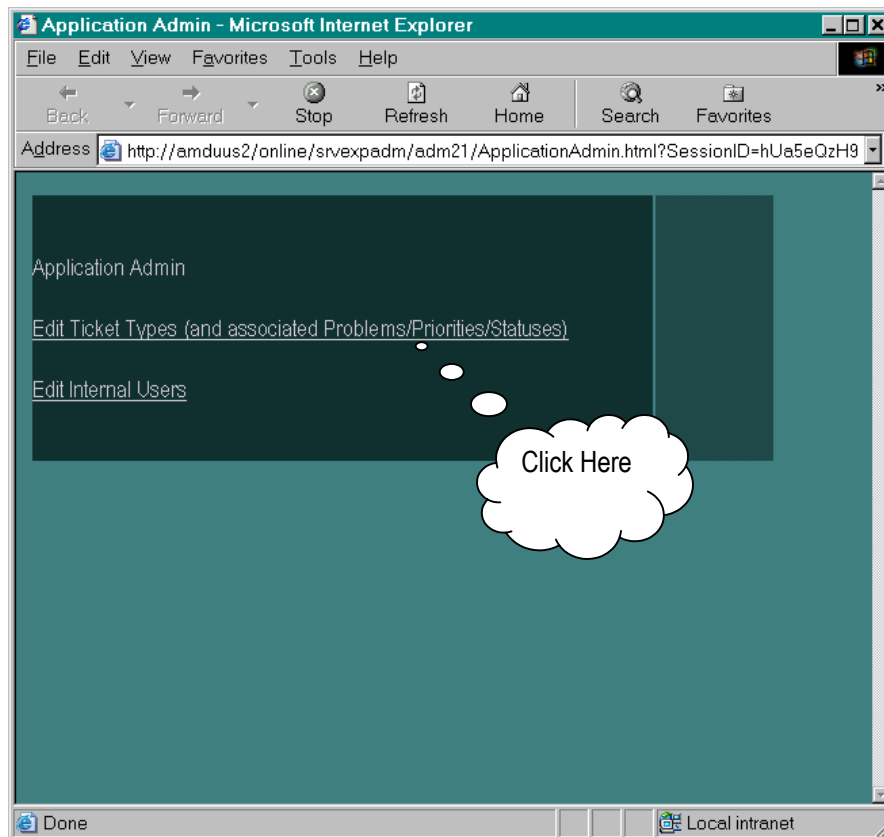
Adminstrating Ticket Types

Accessing The Ticket Type Editor Screen

Once you are logged in, you will be presented with a main application page as below. Upon this page is a link called Application Admin.



- Click on Application Admin from the main page. A new browser window will open presenting you the application admin page as shown below:



- Click on the Edit Ticket Types link. You will be presented with the Ticket Type editing screen, as shown below. From this screen, you can enter new ticket types, or edit existing ones.

Creating a New Ticket Type

At the top of the screen, there are entries for you to enter a new ticket type. The Entries are described as below:

Entry Field	Purpose
Active	Determines whether the ticket type will appear on the ticket creation screen. Ticket types cannot be deleted as they may be used by previously created tickets. Place a check into the check box to make this ticket type active, and it will appear as an option on the ticket creation screen. Unchecking the box will remove the item from the ticket creation screen.
Name	This is the name of the ticket type as presented on the creation screen and

	the ticket data presentation windows.
Description	This is an internal reference seen only on this screen.

Service Express - Microsoft Internet Explorer

Address: http://amduus2/online/srvexpadm/adm21/TicketTypeEdit.html?SessionID=hUa5eQzH90D7AgQgDujt8515687

New Ticket Type:

Active: ☐

Name:

Description:

Submit

Edit Existing Ticket Types:

Edit Problems	Active	Name	Description
Edit Problems	<input type="checkbox"/>	Blue Diamond	
Edit Problems	<input checked="" type="checkbox"/>	Custom Programming I	
Edit Problems	<input checked="" type="checkbox"/>	General Interaction One	General Interaction
Edit Problems	<input type="checkbox"/>	Hardware 3 Installation	
Edit Problems	<input checked="" type="checkbox"/>	House Repair	
Edit Problems	<input type="checkbox"/>	Installation	
Edit Problems	<input checked="" type="checkbox"/>	Interaction Workflow Is	
Edit Problems	<input type="checkbox"/>	Microsoft Word	
Edit Problems	<input checked="" type="checkbox"/>	Order Parts	
Edit Problems	<input checked="" type="checkbox"/>	Portal Software	
Edit Problems	<input type="checkbox"/>	Service Express Beta	

- Enter the three pieces of information describing the ticket type.
- Press Submit
- The ticket type is created and listed below in the “Edit Existing Ticket Types” section of the screen. It is made immediately available to the system.

Editing an existing Ticket Type

In this same window used to create ticket types are existing ticket types. They are listed alphabetically for easy location of the ticket type.

The fields associated with a ticket type are presented here:

Entry Field	Purpose
Active	Determines whether the ticket type will appear on the ticket creation

	screen. Ticket types cannot be deleted as they may be used by previously created tickets. Place a check into the check box to make this ticket type active, and it will appear as an option on the ticket creation screen. Unchecking the box will remove the item from the ticket creation screen.
Name	This is the name of the ticket type as presented on the creation screen and the ticket data presentation windows.
Description	This is an internal reference seen only on this screen.

- Scroll through the existing ticket types to the ticket type you wish to change.
- Change the entry fields as desired.
- Scroll to the bottom of the window and press the Submit button there.
- Your changes are immediate and implemented in the database.

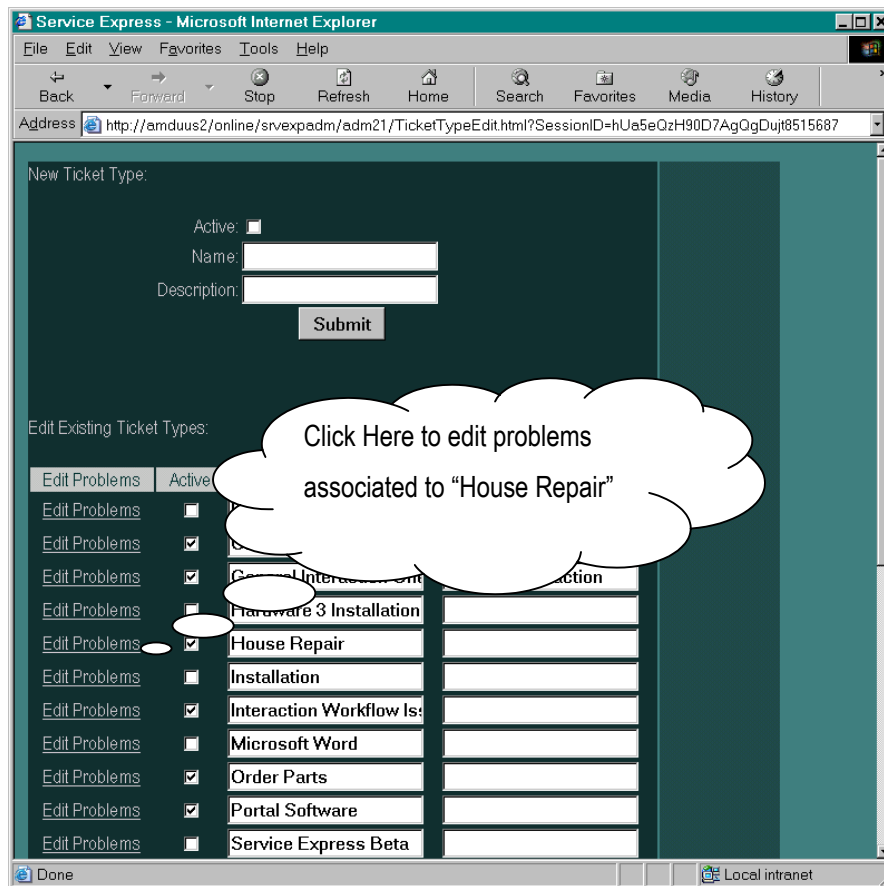
Note that changing the name of a ticket type will change the name in all pre-existing tickets of that type.

Administering Problem Types

Creating a new problem type

To create a new problem type, follow these steps:

- Access the ticket type administration screen, as shown below:



- Click the Edit Problems link beside the Ticket Type you wish to edit the problems of. You will be presented with a screen very similar to the ticket type editing screen, only it will be oriented to problem types.

Entry Field	Purpose
Active	Determines whether the problem type will appear on the ticket creation screen. Problem types cannot be deleted as they may be used by previously created tickets. Place a check into the check box to make this problem type active, and it will appear as an option on the ticket creation screen. Un-checking the box will remove the item from the ticket creation screen.
Name	This is the name of the problem type as presented on the creation screen and the ticket data presentation windows.
Description	This is an internal reference seen only on this screen.

Service Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media

Address <http://amduus2/online/srvexpadm/adm21/ProblemTypeEdit.html?TicketTypeSeq=L2Ve4IVcPO>

Working With Ticket Type: **House Repair**

New Problem Type:

Active: ☐

Name:

Description:

Submit

Edit Existing Problem Types:

Priorities	Status	Active	Name	Description
Priorities	Status	<input checked="" type="checkbox"/>	Broken Door	<input type="text"/>
Priorities	Status	<input checked="" type="checkbox"/>	Broken Toilet	<input type="text"/>
Priorities	Status	<input checked="" type="checkbox"/>	Broken Window	<input type="text"/>

Submit

Done Local intranet

- Enter the three pieces of information describing the ticket type.
- Press Submit
- The ticket type is created and listed below in the “Edit Existing Ticket Types” section of the screen. It is made immediately available to the system.

Editing an existing problem type

In this same window used to create problem types are existing problem types. They are listed alphabetically for easy location of the problem type.

The fields associated with a problem type are presented here:

Entry Field	Purpose
-------------	---------

Active	Determines whether the problem type will appear on the ticket creation screen. Problem types cannot be deleted as they may be used by previously created tickets. Place a check into the check box to make this problem type active, and it will appear as an option on the ticket creation screen. Un-checking the box will remove the item from the ticket creation screen.
Name	This is the name of the problem type as presented on the creation screen and the ticket data presentation windows.
Description	This is an internal reference seen only on this screen.

- Scroll through the existing problem types to the problem type you wish to change.
- Change the entry fields as desired.
- Scroll to the bottom of the window and press the Submit button there.
- Your changes are immediate and implemented in the database.

Note that changing the name of a problem type will change the name in all pre-existing tickets of that type.

Administering Problem Statuses

Creating a new Problem Status

- First access the Problem Editing screen as shown below:

Service Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media

Address <http://amduus2/online/srvexpadm/adm21/ProblemTypeEdit.html?TicketTypeSeq=L2Ve4IVcPO>

Working With Ticket Type: **House Repair**

New Problem Type:

Active: ☐

Name:

Description:

Submit

Edit Existing Problem Types:

Priorities	Status	Active	Name	Description
Priorities	Status	<input checked="" type="checkbox"/>	Broken Door	<input type="text"/>
Priorities	Status	<input checked="" type="checkbox"/>	Broken Toilet	<input type="text"/>
Priorities	Status	<input checked="" type="checkbox"/>	Broken Window	<input type="text"/>

Click Here

Done Local intranet

- Click on the link entitled "Status" next to the given problem type. This will present you with the Problem Status editing window as shown below:

Service Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media

Address <http://amduus2/online/srvexpadm/adm21/StatusEdit.html?SessionID=hUa5eQzH90D7AgQgDu>

Working With Problem Type: **Broken Door**

New Ticket Status:

Name:

Active: ☐

Default: ☐

Hide Status From External Drop Down: ☐

Down: ☐

Hide Ticket From Ticket Lists: ☐

Submit

Edit Existing Statuses:

Active	Default	Hide From List	Hide From External	Name
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cancel
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Closed
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ignore
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	On Hold
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Open

Submit

Done Local intranet

Entry Field	Purpose
Active	Check to make the problem status available to the users of the application.
Name	This is the name of the problem status as presented on the ticket data presentation windows.
Default	When a ticket is created, it must have one unique default status to fall into. Check this to make that problem status this default status for new tickets.
Hide Status From External Drop Down	Check this box if you do not wish any external users to be able to set the ticket to this status.
Hide Ticket From Ticket Lists	Check this box if the ticket should be removed from the ticket lists of internal and external users.

- Fill in the fields as appropriate
- Press the Submit button.
- The problem status is now available to the system.

Editing an existing Problem Status

- Access the Problem Status Editing Screen (as shown above)
- Scroll to the problem status to be edited.
- Change the fields as appropriate

Entry Field	Purpose
Active	Check to make the problem status available to the users of the application.
Name	This is the name of the problem status as presented on the ticket data presentation windows.
Default	When a ticket is created, it must have one unique default status to fall into. Check this to make that problem status this default status for new tickets.
Hide Status From External Drop Down	Check this box if you do not wish any external users to be able to set the ticket to this status.
Hide Ticket From Ticket Lists	Check this box if the ticket should be removed from the ticket lists of internal and external users.

- Scroll to the bottom of the screen.
- Press the Submit button.
- Your changes are entered into the database and immediately available.

All tickets using that status will be changed to reflect that status.

Administering Problem Priority

Creating a new Problem Priority

- Access the problem type editing screen

Service Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media

Address <http://amduus2/online/srvexpadm/adm21/ProblemTypeEdit.html?TicketTypeSeq=L2Ve4IVcPO>

Working With Ticket Type: **House Repair**

New Problem Type:

Active: ☐

Name:

Description:

Submit

Edit Existing Problem Types:

Priorities	Status	Active	Name	Description
Priorities	Status	<input checked="" type="checkbox"/>	Broken Door	<input type="text"/>
Priorities	Status	<input checked="" type="checkbox"/>	Broken Toilet	<input type="text"/>
Priorities	Status	<input checked="" type="checkbox"/>	Broken Window	<input type="text"/>

Submit

Click Here

Done Local intranet

- Click on the Priorities link to reach the priority editor as shown below.
- Under “New Priority,” enter the following information:

Entry Field	Purpose
Active	Check to make the priority available to the users of the application.
Name	This is the name of the priority as presented on the ticket data presentation windows.
Default	When a ticket is created, it must have one unique default priority to fall into. Check this to make that problem status this default priority for new tickets of the given problem type.

Service Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media

Address t.html?SessionID=hUa5eQzH90D7AgQgDujt8515687&ProblemTypeSeq=Nm8eTnhhpu26457190

Working With Problem Type: **Broken Door**

New Priority:

Active: ☐

Default: ☐

Name:

Submit

Edit Existing Priorities:

Active	Name	Default
<input checked="" type="checkbox"/>	1 <input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2 <input type="text"/>	<input type="checkbox"/>

Submit

Done Local intranet

- Click the Submit button
- The new priority is made immediately available.

Editing an existing Problem Priority

- Access the problem priority editing screen as shown above.
- Scroll to the priority you wish to edit (they are alphabetically listed.)
- Update the fields appropriately:

Entry Field	Purpose
Active	Check to make the priority available to the users of the application.

Name	This is the name of the priority as presented on the ticket data presentation windows.
Default	When a ticket is created, it must have one unique default priority to fall into. Check this to make that problem status this default priority for new tickets of the given problem type.

- Scroll to the bottom of the screen.
- Press the Submit button.
- Your changes are made immediately.

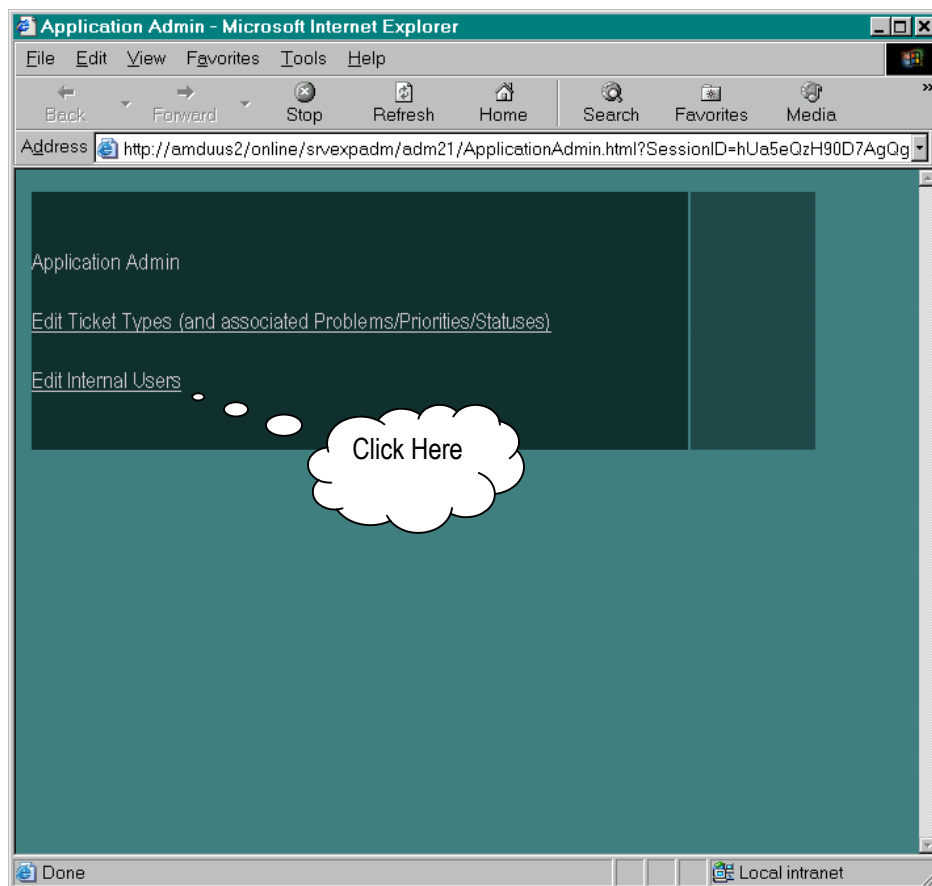
Name changes will be reflected on those tickets using that priority.

Adminstrating Internal Users

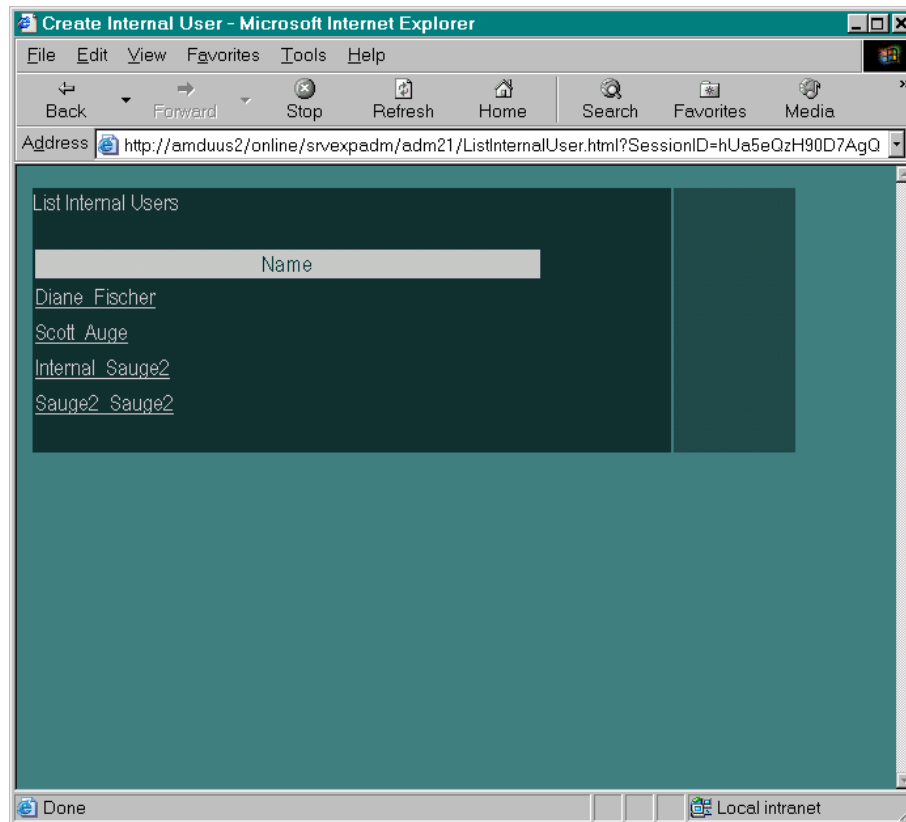
Updating Internal User Information

It is possible to change the password (but not look up) of an internal user. Name changes and user id changes can be made, as well address and contact information changes.

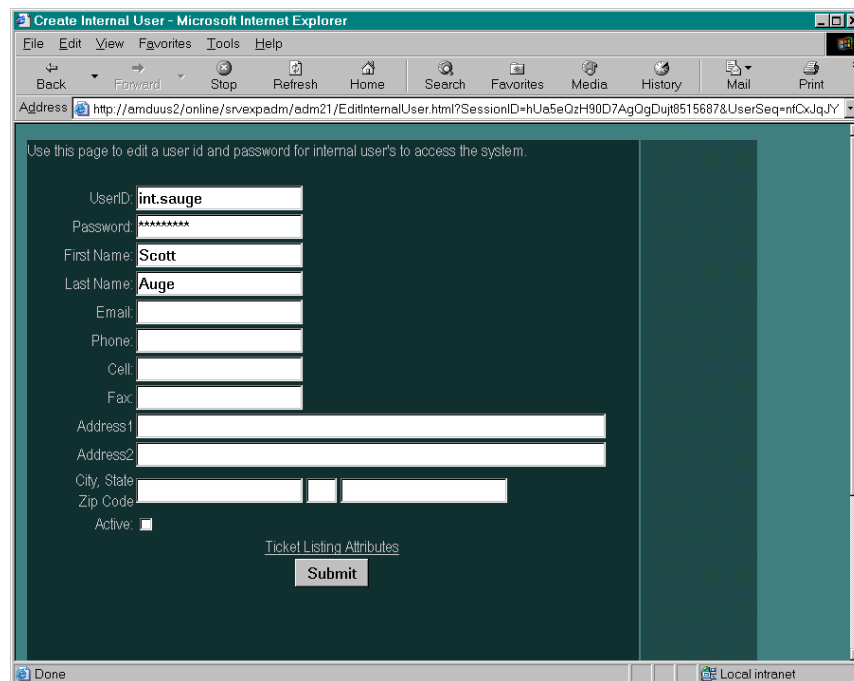
- Access the Application Administration window as shown in previous steps
- Click on the “Edit Internal Users” link to reach a listing of the internal users.



- Click on the user name who's ticket listings you wish to edit.



- You will be presented with the information associated to the internal user.

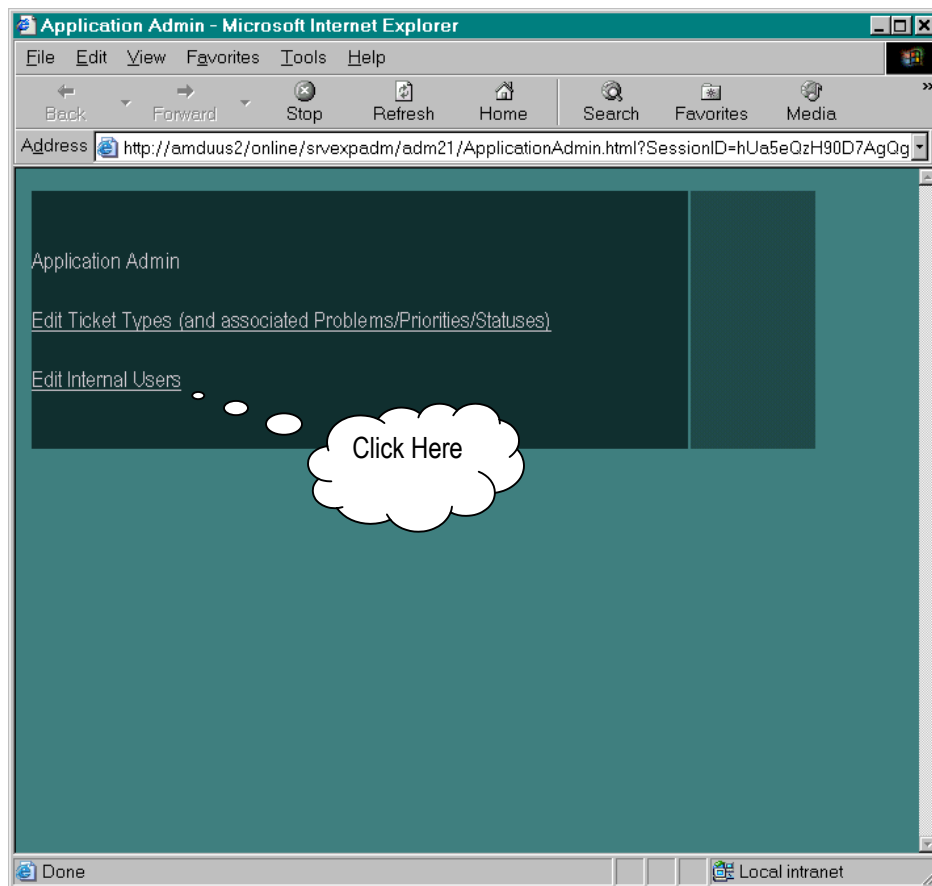


- Update the information as desired.
- Press the Submit button
- Updates are made immediately to the database and are reflected in the action of the program.

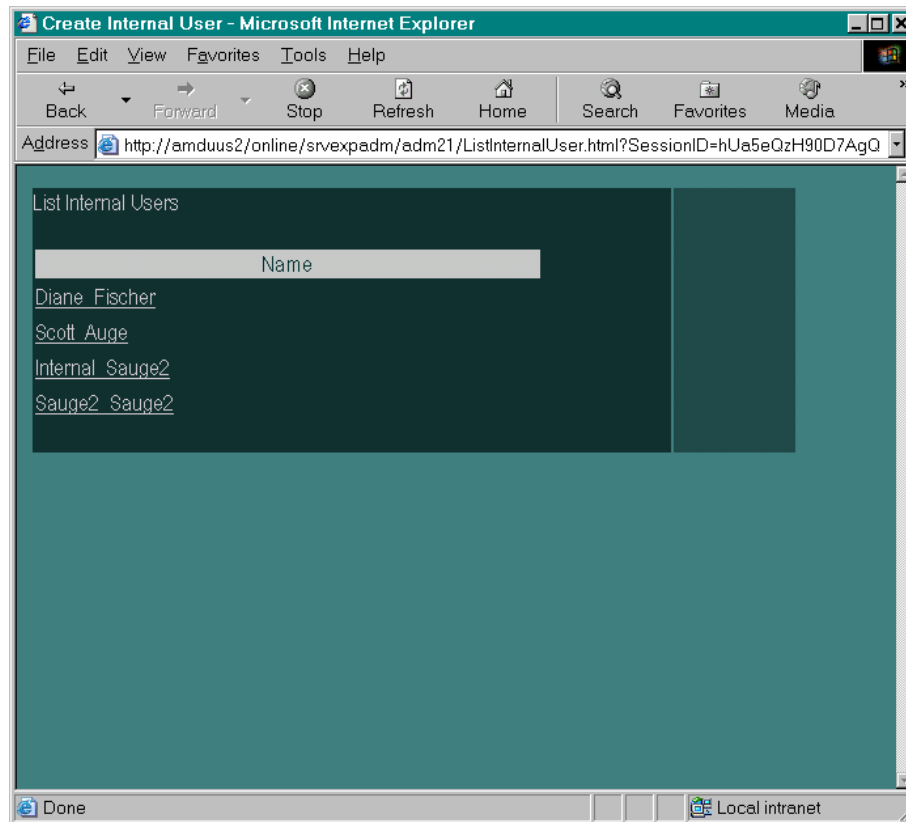
Administrating Ticket Listings

It is possible to edit which tickets make it to an internal user's ticket listing window. This will aid users by weeding out tickets that are not of interest to their position in the issues of the company.

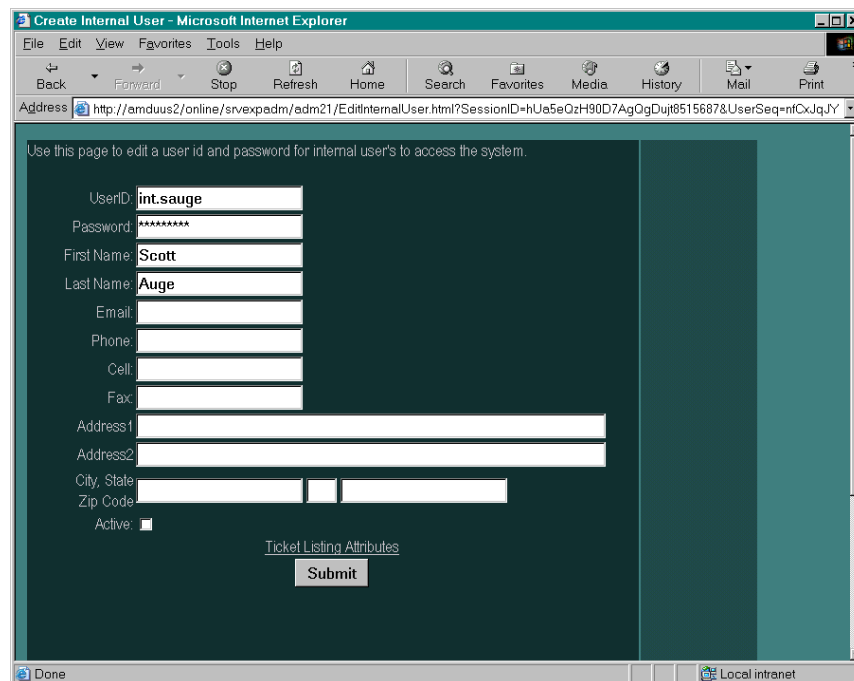
- Access the Application Administration window as shown in previous steps:



- Click on the "Edit Internal Users" link to reach a listing of the internal users.
- Click on the user name who's ticket listings you wish to edit.



- You will be presented with the information associated to the internal user.



- Click on the "Ticket Listing Attributes" link found near the bottom of the page. You will be presented with the following page (with your defined ticket types, problems, statuses, and priorities):

Use this page to edit an internal user's ticket listing attributes.
You are editing Scott Auge's Ticket Listing Attributes:

Custom Programming Issue	
General Interaction One	
House Repair	
Broken Door	
Status Available	Priorities Available
<input type="checkbox"/> Cancel	<input type="checkbox"/> 1
<input type="checkbox"/> Closed	<input type="checkbox"/> 2
<input type="checkbox"/> Ignore	
<input type="checkbox"/> On Hold	
<input type="checkbox"/> Open	
Broken Toilet	
Status Available	Priorities Available
<input type="checkbox"/> Assigned To Repair Person	<input type="checkbox"/> One
<input type="checkbox"/> Complete	<input type="checkbox"/> Two
<input type="checkbox"/> Office Knows	
<input type="checkbox"/> Waiting for parts	
<input type="checkbox"/> Work In Process	
Broken Window	
Status Available	Priorities Available
<input type="checkbox"/> Cancelled	<input type="checkbox"/> 1
<input type="checkbox"/> Closed	
<input type="checkbox"/> Dispatched	
<input type="checkbox"/> Received	
Interaction Workflow Issue	
Create Ticket	
Status Available	Priorities Available
List Ticket	

- Check the appropriate status's and priorities for the given ticket types and problems you wish to appear on that internal user's listing screen.
- Scroll to the bottom and click the Submit button.
- Changes are made immediately.

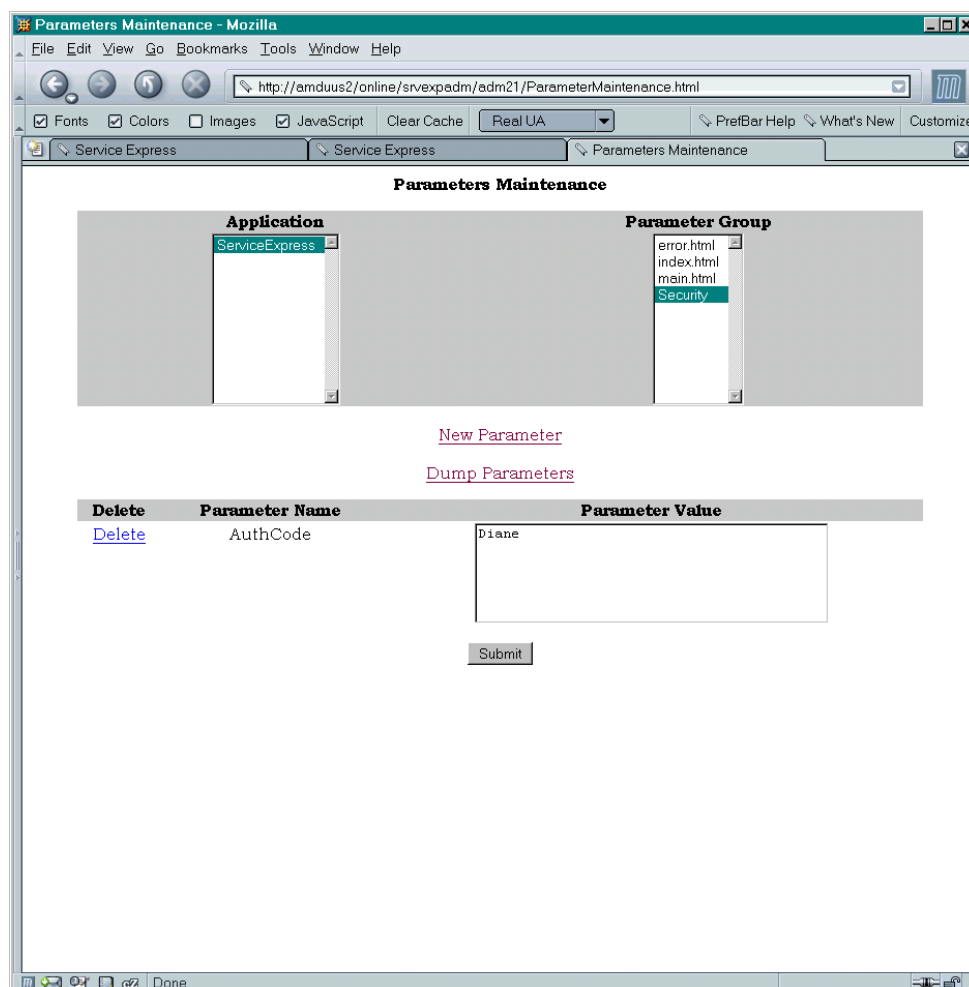
Parameters Available To The Application

Certain parameters are available for the operation of the application. They contain messages that shall appear on certain pages of the web site, as well operational aspects of the application. (Note: The Mozilla Web Browser was used to access these screens for this document. You can still use the Internet Explorer Web Browser on these screens with no change of instruction.)

Setting the Internal User Authorization Code

One can use the parameters maintenance screen (ParameterMaintenance.html) to set the authorization code for creating internal users.

- Access the parameter maintenance screen

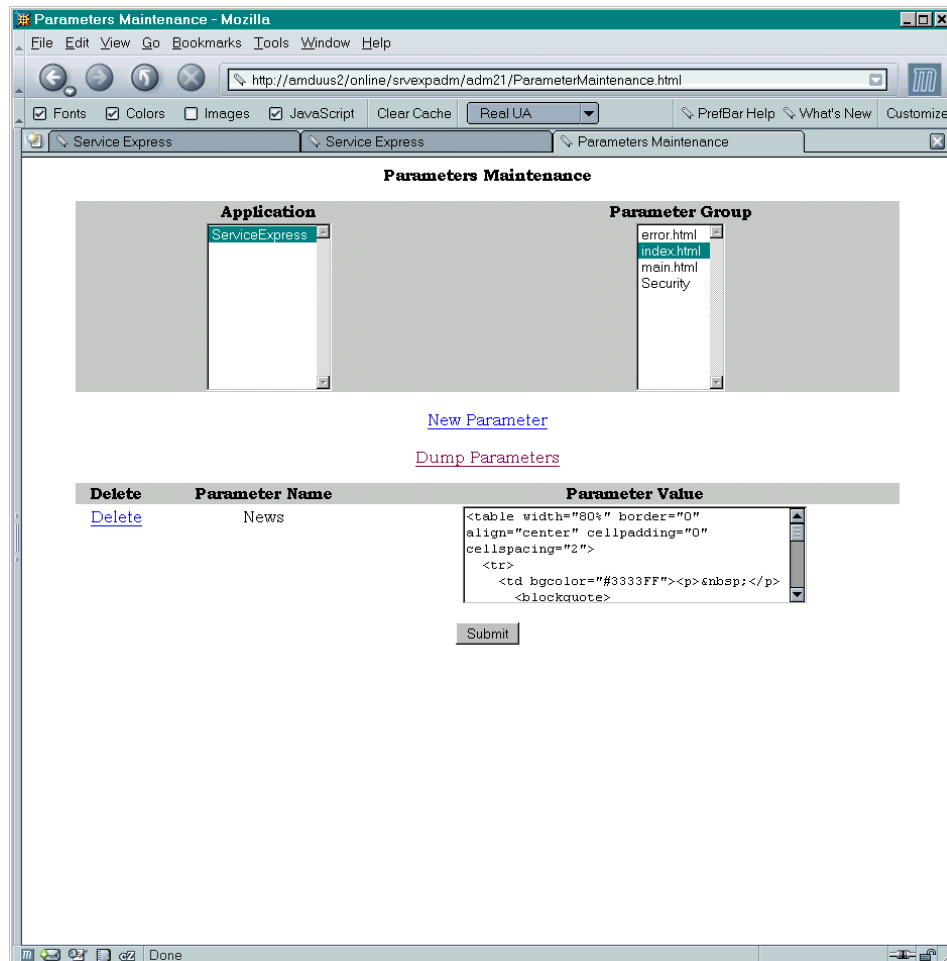


- Click “Service Express” in the Application Column
- Click “Security” Parameter Group Column
- Look for the parameter named “AuthCode”
- Set the parameter value to the pass phrase/word for the CreateInternalUser.html screen. Do NOT include a carriage return in this value!
- Press Submit.
- Changes are made immediately to the database.

Setting News on the External Web Site Login Page

There is a parameter available for you to set a message to users accessing the login screen of the external web site. Note that this news can be read by unauthenticated and un-registered browsers of the site.

- Access the Parameter’s Maintenance page (ParameterMaintenance.html)



- Click "Service Express" in the Applications column
- Click "index.html" in the Parameter Group column
- Find the parameter named "News"
- Enter the message. HTML tags can be used in the message!
- Press Submit.

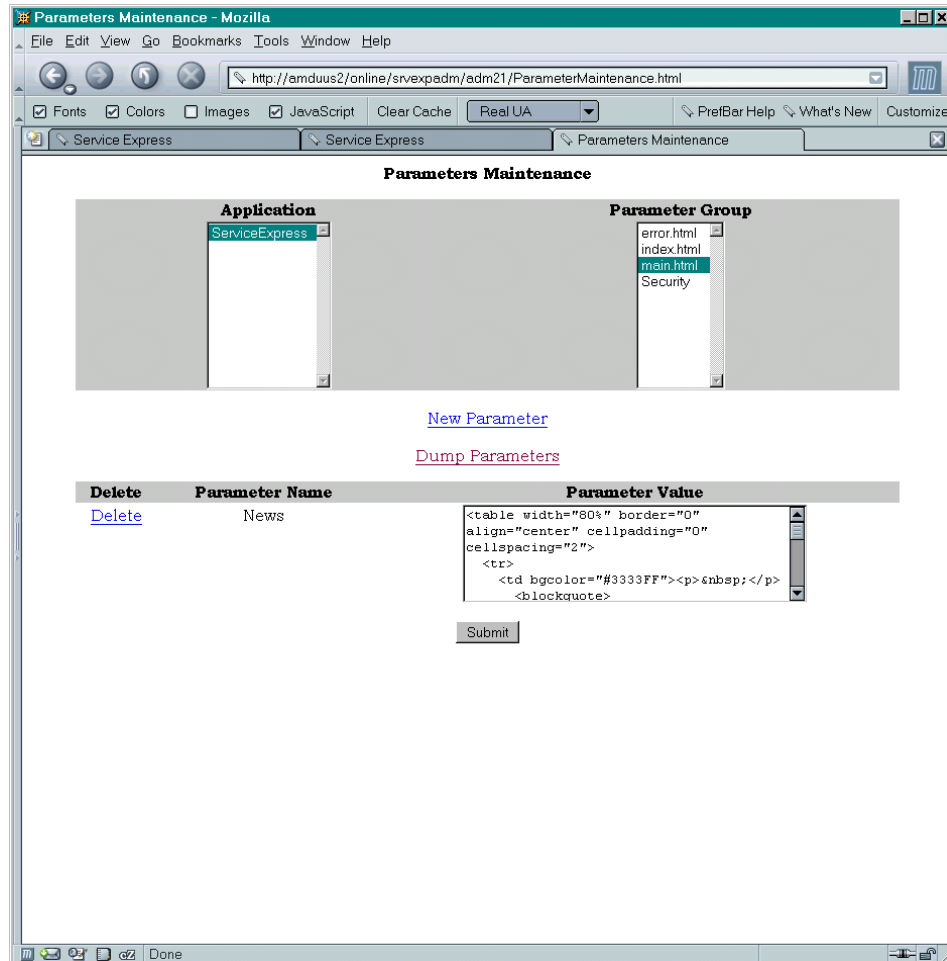
Changes are made immediately to the database and external login screen.

One may want to use an HTML editor like DreamWeaver to create the segment of HTML code to be included on the page.

Setting News on the External Web Site Main Page

There is a parameter available for you to set a message to users accessing the main screen of the external web site. Note that this news can be read by logged in users only.

- Access the Parameter's Maintenance page (ParameterMaintenance.html)

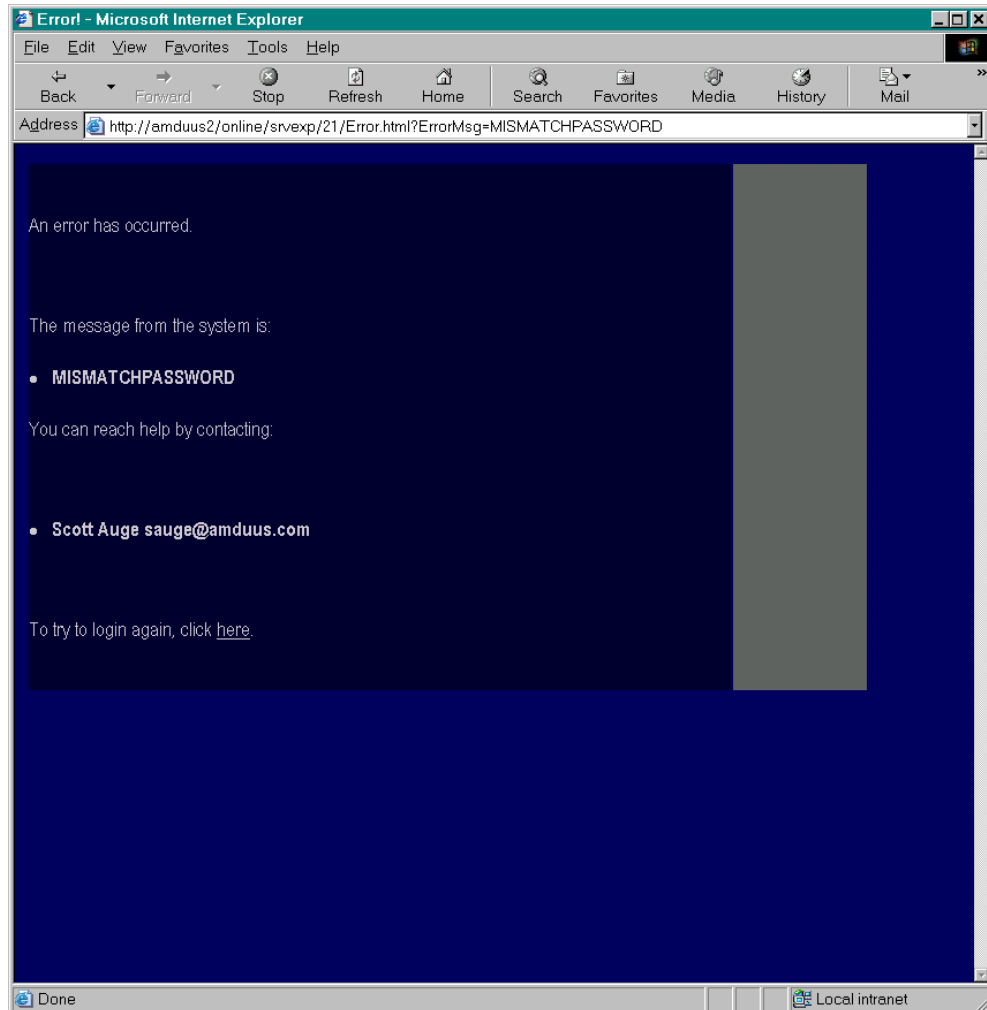


- Click "Service Express" in the Applications column
- Click "main.html" in the Parameter Group column
- Find the parameter named "News"
- Enter the message. HTML tags can be used in the message.
- Press Submit.

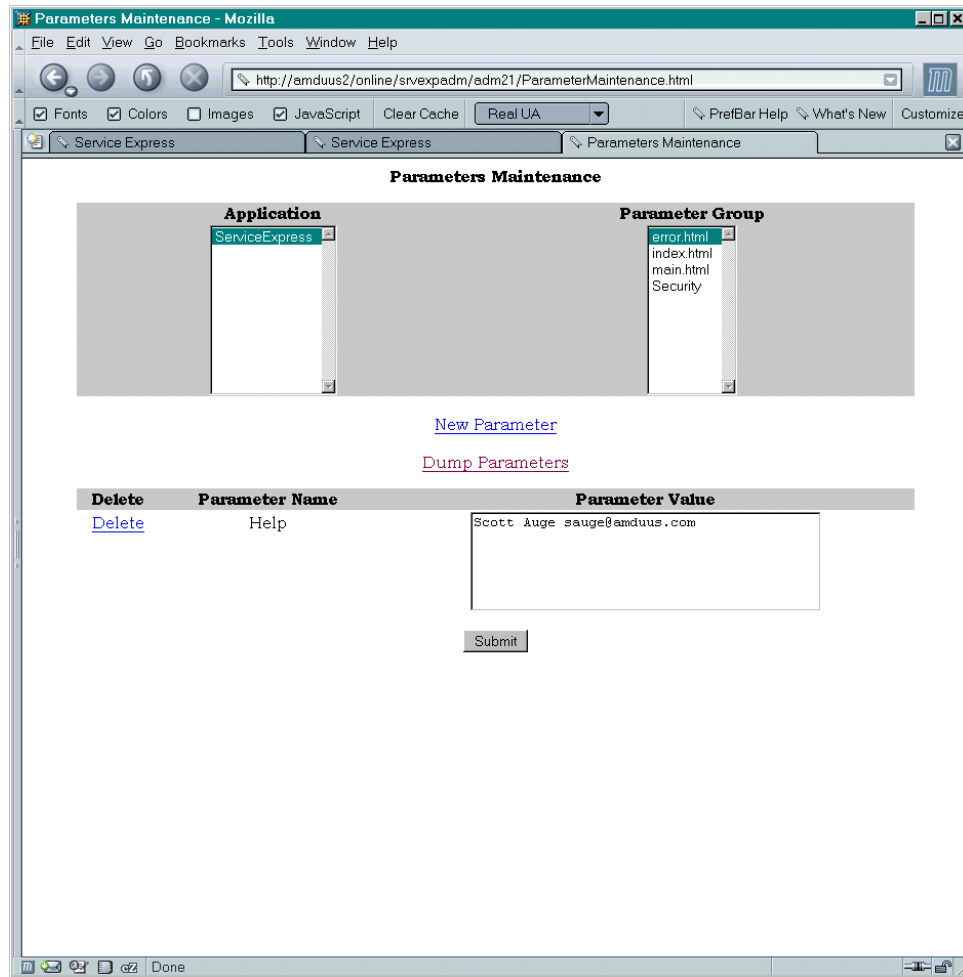
Changes are made immediately to the database and external login screen.

Setting Help Contact In Error Screens

There is a parameter available for you to set contact information for users who encounter a problem running the application. An error screen such as below may occur when the user has done something wrong (such as entered a bad password/user id combination:)



- Access the Parameter's Maintenance page (ParameterMaintenance.html)



- Click "Service Express" in the Applications column
- Click "error.html" in the Parameter Group column
- Find the parameter named "Help"
- Enter the message. HTML tags can be used in the message!
- Press Submit.

Changes are made immediately to the database and external error screen.

Getting Started With Customers

Before the application can be used, the customer base must be entered. If the customers are outside the organization, one should look to the accounting or sales organizations to obtain customer numbers. If the application is being used internally, customers could represent different departments.

Creating Main Customer Information***Administering Customer Sites******Administering Customer Contacts*****Getting Started With Tickets*****Creating A Ticket******Listing Tickets******Updating A Ticket*****Logging Out**

Logging out of the system is pretty important. It is accomplished by clicking on the Logout hyperlink available at the menu at the top of each screen. By logging out, you prevent people from using the system under your name. You can also log out by completely closing the browser (and all associated windows) on the system.

Part II External Web Site

About

The external web site is used by the people who wish to relate an issue to the organization using a web site. Currently, the companies or organizations the user is attached to must be pre-entered into the system. This provides an authorization code the user enters in their user id identification screen

Handling Login's

In order for the system to identify the user, so that only their information is made available and no one else's, a login procedure is used. The user will create an account for themselves, or an account will be made available for them.

In order for the user to create an account, they will need the customer number and authorization code.

Creating a customer Login internally***Creating a customer Login externally***

- Access the external web site home page.

This page contains entries to create an external user. See the application administrator for information about the URL to reach this page with.

The first set of input boxes are for existing logins. The second set of boxes are related to creating a new login.

- Enter the customer number. This is the customer number the external customer is known by.
- Enter the authorization code. This code tells the system that the user is indeed a member of this organization. This authorization code should be kept confidential. If there are people who need access to the application, the customer organization may want to appoint someone to create IDs so that this code is not well known.
- Enter the login id the user wishes to be known by. Examples might be FirstName.LastName or some abbreviation of their initials. User's need to be unique to the system, not to the company so be careful about people with the same name.
- Next is the password the user should use to authenticate themselves as that user.
- The following information is contact information for that user. It is not location information for a ticket!

Welcome To Service Express! - Microsoft Internet Explorer

Address: <http://amduus2/online/srvexp/21/index.html>

Welcome to Service Express!

Use this program to assist you in contacting the Service Department.

If you need training, please contact sauge@amduus.com for more informaion....

If you already have a login, please enter the web site here:

UserID:

Password:

If you do not have a log in, please register to enter the web site:

Customer Number:

AuthCode:

UserID:

Password:

First Name:

Last Name:

Phone:

Email:

Pager:

Cell:

Fax:

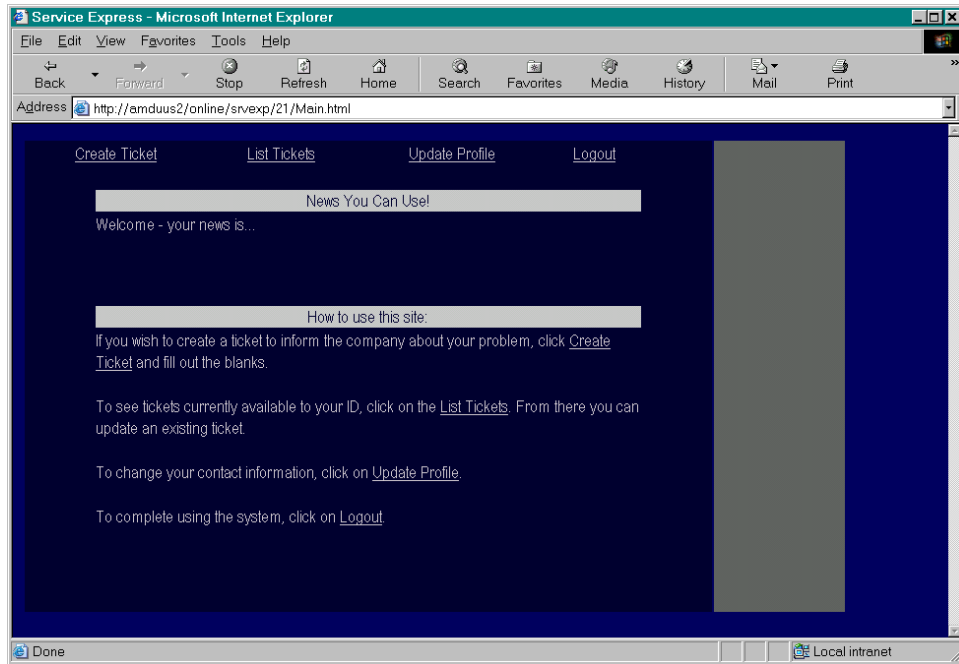
Address:

Address:

City, State, Zip:

- Upon proper creation of the login, the web user will be directed to the main screen as shown below

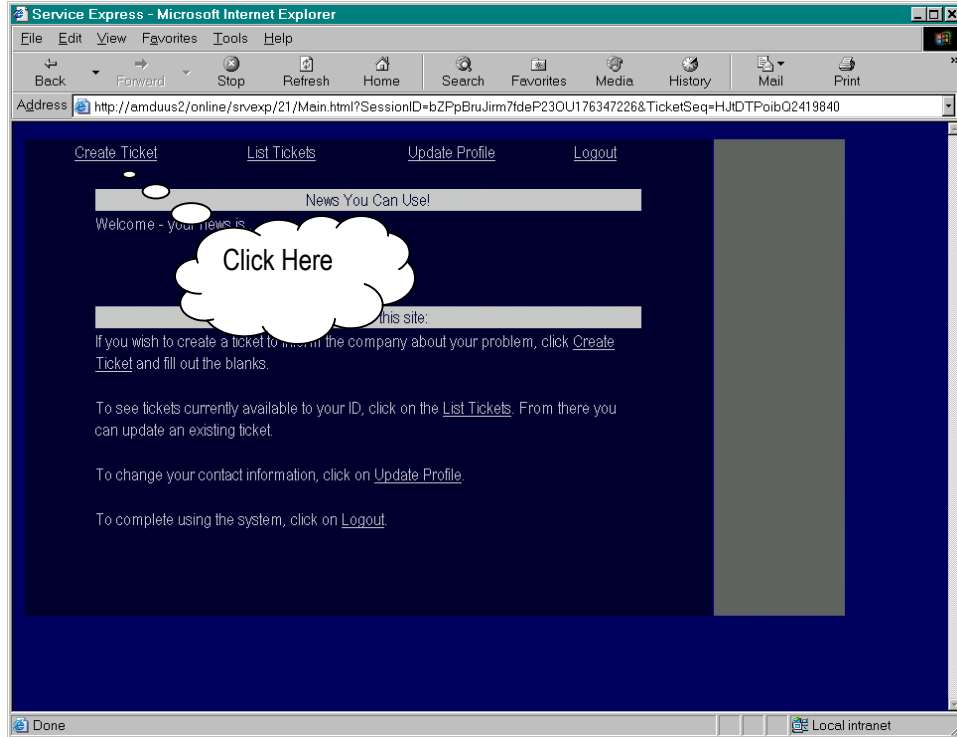
From this page, there are links to all available operations the user may wish to perform on tickets in the system.



Handling Tickets

Users can create, update, and list tickets associated with their login. The following screens and accompanying instructions will give the reader an idea how to accomplish this.

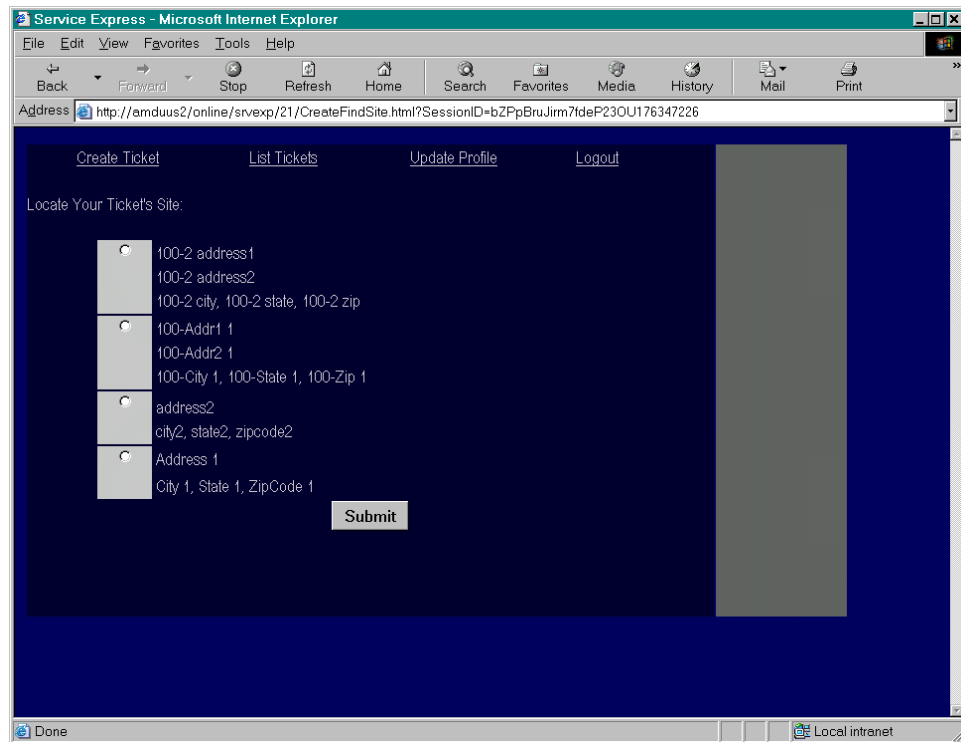
Creating a Ticket



To create a ticket, one should:

- Ensure one is logged into the system.
- Access a page that has Create Ticket hyperlink.
- Click on the Create Ticket hyperlink.

The first page one will encounter, is identifying the available sites the ticket working organization will work at. The user should pick one of those sites and click the “Submit” button.



The next screen helps the user classify the ticket so that it reaches the correct group of people in the organization to address their problem.

- The user should click the appropriate ticket type and click the "Submit" button.

Service Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Address <http://amduus2/online/srvexp/21/Create.html>

[Create Ticket](#) [List Tickets](#) [Update Profile](#) [Logout](#)

You will need to progress through a series of pages to create a ticket. Please answer the questions as best you can. The last screen will have a free form input for you to more fully describe details in your own words.

Enter Ticket Type:

- ☐ General Interaction One
- ☐ Service Express Issue
- ☐ House Repair
- ☐ Interaction Workflow Issue
- ☐ Portal Software
- ☐ Custom Programming Issue
- ☐ Steve King
- ☐ Order Parts

Submit

Done Local intranet

Once the ticket type has been chosen, the available problem types are presented to further aid in classifying the ticket. The user should choose a problem for the ticket.

Service Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Address <http://amduus2/online/srvexp/21/Create1.html>

[Create Ticket](#) [List Tickets](#) [Update Profile](#) [Logout](#)

Enter Problem:

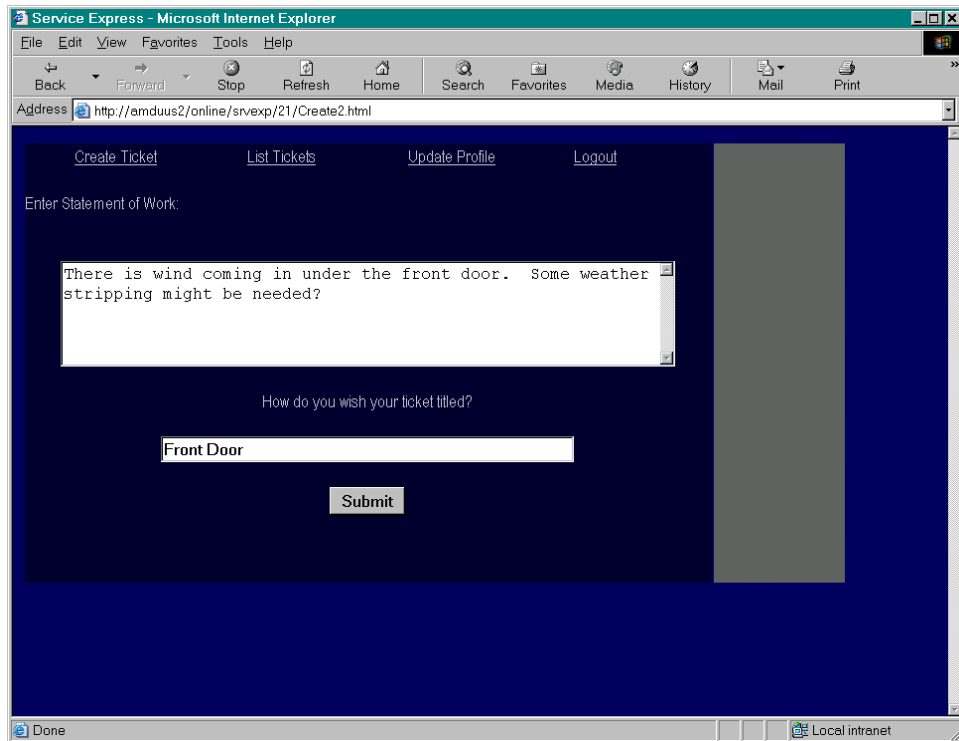
- ☐ Broken Toilet
- ☐ Broken Door
- ☐ Broken Window

Submit

Done Local intranet

Next the system will allow the user to present their problem in their own words to fully inform the organization of their problem. There is a limit of 32,000 characters for this description.

One should name the ticket in the second input box. This is what will appear on the ticket listing page. It is not recommended that the title be more than 80 characters long.



Upon clicking the “Submit” button, the user will be presented with the new ticket in the ticket display/updating screen.

Once again the user will have the ability to update the ticket in case they have more to add. See the section “Updating A Ticket” for more information on how to accomplish this.

Service Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media History Mail Print

Address http://amduus2/online/srvexp/21/Update.html

[Create Ticket](#) [List Tickets](#) [Update Profile](#) [Logout](#)

Contact Information

Name	1027 F 1027 Last Name	Phone	555-555-1212
Email	sauger@amduus.com	Fax	No Fax
Pager	No Pager	Mobile	No Mobile
Ticket Address	address2 city2, state2zipcode2		

Reference	2003-E-06-00004	Status	Open
Ticket Type	House Repair	Priority	1
Problem Type	Broken Door		

Brief Description

Front Door

Statement of Work

There is wind coming in under the front door. Some weather stripping might be needed?

Work Log

06/05/03 16:07:52
Status: Open by 1027 F 1027 Last Name

Update Work Log

Change Status

No Change

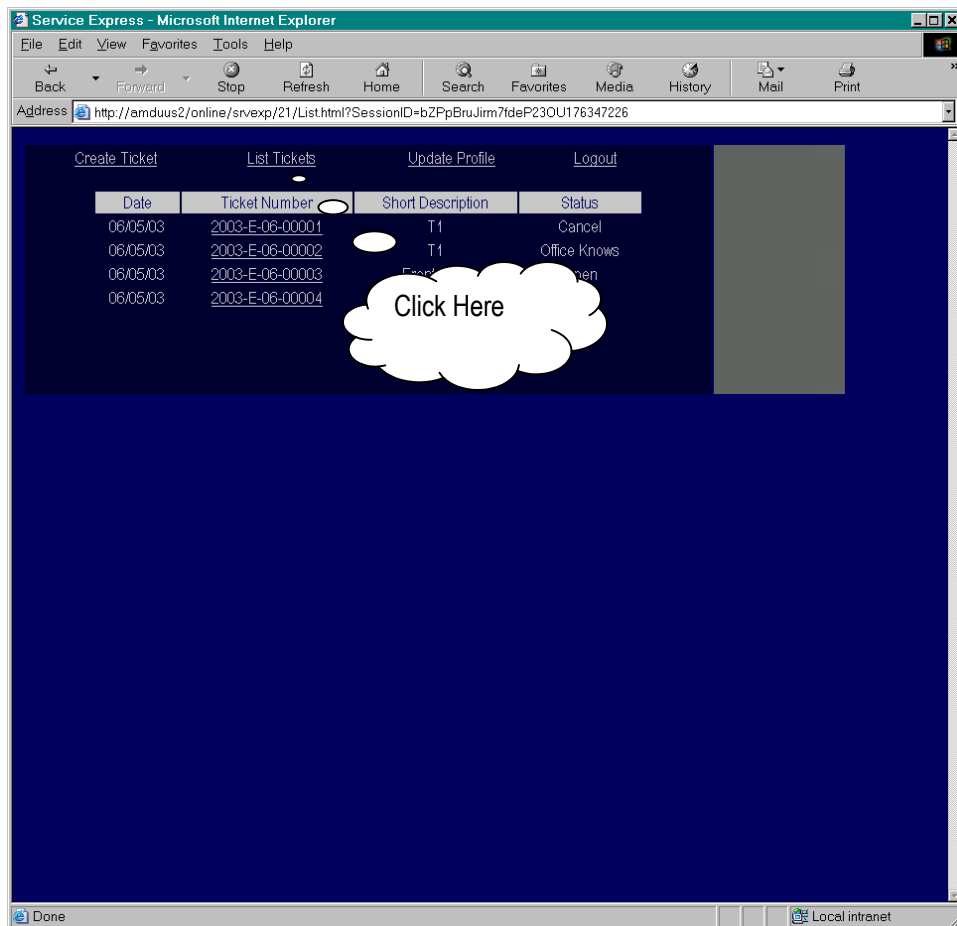
Submit

Done Local intranet

Listing Tickets

Listing the tickets associated to the logged in user is accomplished by the following:

- Log into the external web site using the URL provided by the application administrator
- Click on the List Tickets hyperlink



The List Tickets hyperlink is available on every page of the external web site. To reach the page, simply click the List Ticket's hyperlink.

One will be able to view or update the ticket by clicking on the hyperlink associated with the ticket number.

Updating Tickets

Updating a ticket is accomplished by using the List Tickets functionality.

By listing the tickets, you will be presented with a hyperlink of the ticket number, which one should click on to access the ticket information as shown below:

Service Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media History Mail Print

Address <http://amduus2/online/srvexp/21/Update.html?SessionID=bZPpBruJirm7deP23OU176347226&TicketSeq=hra2dg5Utn2780228>

[Create Ticket](#) [List Tickets](#) [Update Profile](#) [Logout](#)

Contact Information

Name: 1027 F 1027 Last Name Phone: 555-555-1212

Email: sauge@amduus.com Fax: No Fax

Pager: No Pager Mobile: No Mobile

Ticket Address

address2

city2, state2, zipcode2

Reference: 2003-E-06-00004 Status: Open

Ticket Type: House Repair Priority: 1

Problem Type: Broken Door

Brief Description

Front Door

Statement of Work

There is wind coming in under the front door. Some weather stripping might be needed?

Work Log

06/05/03 16:07:52

Status: Open by 1027 F 1027 Last Name

Update Work Log

Will be out on the 12th at noon....

Change Status

No Change

Submit

Done Local intranet

The user can add additional comments which will be made available to the organization working the ticket.

If allowed by the organization, the user can also change the status of the ticket. A commonly available status available to the external web site user is "Cancel."

Service Express - Microsoft Internet Explorer

Address: <http://amduus2/online/srvexp/21/Update.html?SessionID=bZPpBruJirm7ideP23OU176347226&TicketSeq=hra2dg5Utn2780228>

[Create Ticket](#) [List Tickets](#) [Update Profile](#) [Logout](#)

Contact Information	
Name: 1027 F 1027 Last Name	Phone: 555-555-1212
Email: sauge@amduus.com	Fax: No Fax
Pager: No Pager	Mobile: No Mobile
Ticket Address: address2 city2, state2zipcode2	

Reference: 2003-E-06-00004	Status: Open
Ticket Type: House Repair	Priority: 1
Problem Type: Broken Door	
Brief Description Front Door	
Statement of Work There is wind coming in under the front door. Some weather stripping might be needed?	
Work Log	
06/05/03 16:07:52 Status: Open by 1027 F 1027 Last Name 06/05/03 23:02:37 1027 F 1027 Last Name Adds: Will be out on the 12th at noon....	
Update Work Log	
<div style="border: 1px solid black; height: 40px;"></div>	
Change Status	
No Change	
Submit	

Done Local intranet

With the clicking of the “Submit” button found at the bottom, the remarks and/or the status change are marked in the work log of the ticket. The work log includes the user’s name who updated the ticket, as well the time the ticket was updated.

The time used is the system time available on the server the ticket software is running on, not the local time of the user or the site.

Logging Out

Logging out of the system is pretty important. It is accomplished by clicking on the Logout hyperlink available at the menu at the top of each screen. By logging out, you prevent people from using the system under your name. You can also log out by completely closing the browser (and all associated windows) on the system.

Service Express - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media History Mail Print

Address http://amduus2/online/srvexp/21/Update.html?SessionID=bZPpBruJirm7ideP23OU176347226&TicketSeq=hra2dg5Utn2780228

Create Ticket List Tickets Update Profile Logout

Contact Information

Name	1027 F 1027 Last Name	Phone	555-555-1212
Email	saug@amduus.com	Fax	No Fax
Pager	No Pager	Mobile	
Ticket Address	address2 city2, state2zipcode2		

Click Here

Reference	2003-E-06-00004	Status	Open
Ticket Type	House Repair	Priority	1
Problem Type	Broken Door		

Brief Description

Front Door

Statement of Work

There is wind coming in under the front door. Some weather stripping might be needed?

Work Log

06/05/03 16:07:52
Status: Open by 1027 F 1027 Last Name

06/05/03 23:02:37
1027 F 1027 Last Name Adds:
Will be out on the 12th at noon....

Update Work Log

Change Status

No Change

Submit

Done Local intranet