Service Express

Process Guide

Your Company Information Here

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Introduction

This book is one of four describing the operation of Service Express. It's purpose is to explore possible processes within the company the application would fit into.

It describes the user base for the application.

A section is also available describing tickets, statuses, and problems types.

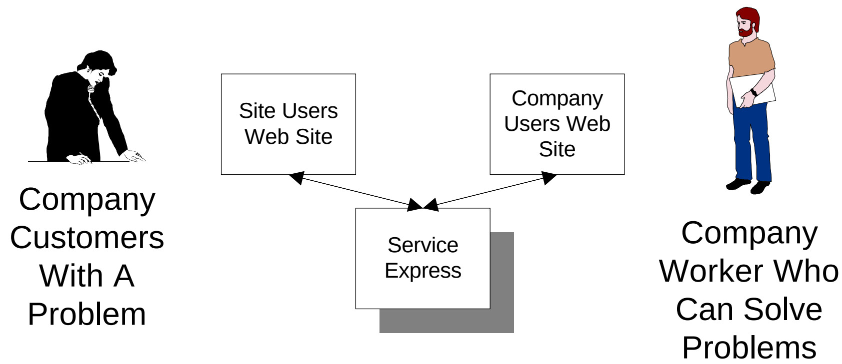
Discussion about the user and ticket routing between users is described.

And a short discussion about configuring the application is available.

The User Base

There are two main user bases to the application. The first user base are the customers of the company using the Service Express software. The functionality for these users are documented in the Site Users Guide. This group of users are generally the problem providers.

The second set of users are those employees and agents of the company that has implemented Service Express. This group of users are responsible for the solution of the problems provided by the Site users.



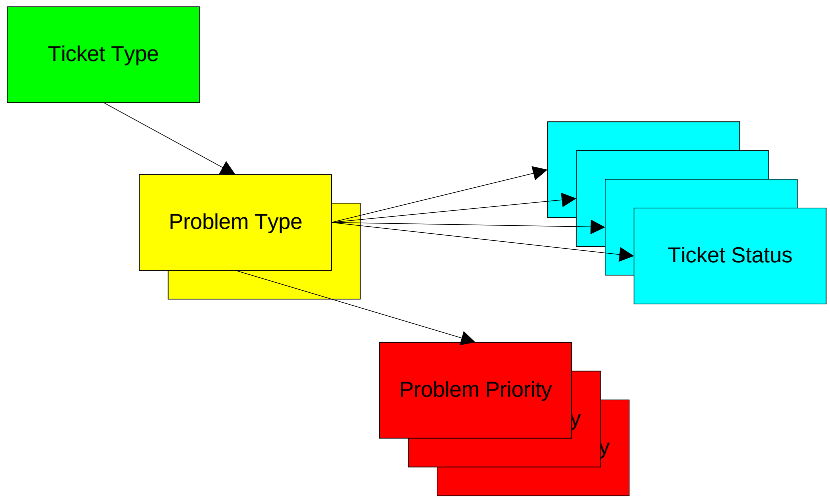
The concept of a ticket

A ticket is a means of interaction with the company. It could be a problem with a piece of equipment as with OEMs, a request for some kind of service be performed such as with property management company's, or an interaction with the company such as a dispute resolution process.

The above three examples could be considered Ticket Types. Using the example of an OEM with equipment, one could set up ticket types of Machine A, Machine B, Machine C. This will be the model for further discussion within this document.

Within ticket types are problem types. Problem types further category the interaction one would have. Some machines might have potential problems that other machines do not. For example, if Machine A is electrically powered, there could be a problem type of "Electrical." Other problems the machine might have might be "Installation" or "De-Installation" for requests for new machines if applicable to your business.

Problems are generally solved via a work flow of people and the steps that they perform. Each one of these steps should be represented as a status for the problem solving process. Some example statuses could be “Open,” “In Transit,” “Back Ordered,” “On Site,” “Closed,” “Cancelled.”



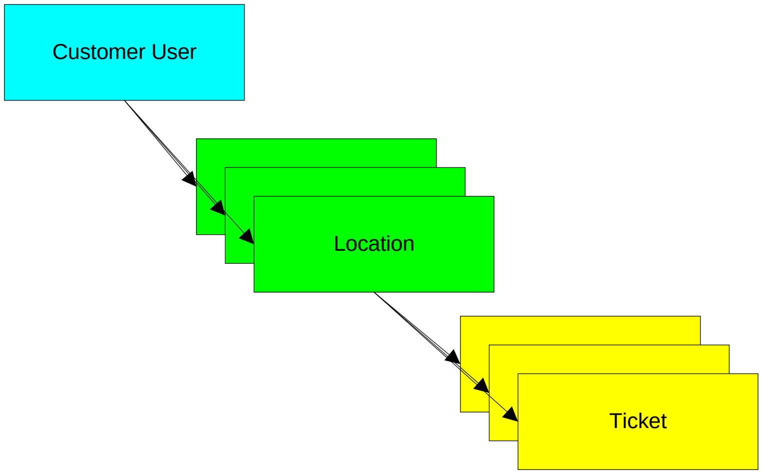
How data concepts are related to each other for a ticket

Some problems could be more important than other problems. For this purpose, certain problems can be defined as having a different priority from other problems. Priorities can be numerical such as 1, 2, 3… or by code name, Alpha, Bravo, Charlie, etc.

How a Ticket fits with Customer Users and Locations

Customer users often have multiple locations for their equipment. A location could be a street address, a floor within their building, or a cubicle. The Customer User can add locations or update existing locations for their needs.

A ticket is associated with a location should a unit of work be required of a service person. This way the ticket will contain that information that can be directly sent to the service person.



Relations between Customer User, Locations of Work, and Tickets

How a ticket fits in with Company Users

The application is designed to route tickets to company users based on status, position, and actions taken by a ticket owner.

When a ticket is first created, it is assigned to a person who is referred to as the "ticket owner." When a problem type is set up, a position is set as the default receiver for that problem. The system will then choose an employee within that position to assign the ticket to.

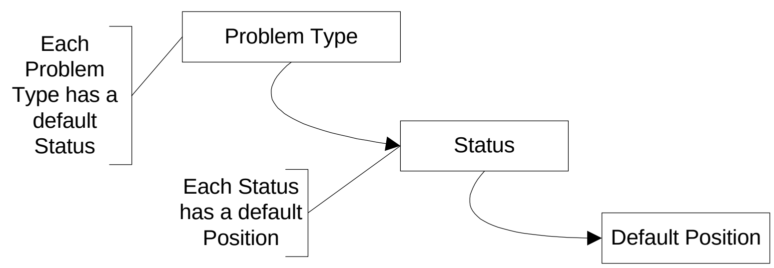
A company user can also create a ticket. When creating a ticket, the system determines the position appropriate for the problem type and sends the ticket to an employee in this position. If the ticket creator is a member of that position, then the ticket will be owned by that user.

A ticket owner can pass ownership of the ticket to another position or company user. Passing ownership of the ticket means the ticket will be placed in that person's work queue within the application. If the ticket owner chooses to pass the ticket to a position, the system will assign the ticket to an employee who is a member of that position.

If the ticket owner changes the status of the ticket, the system will find the default position to send the ticket to for that status. If the default position is the same as the ticket owner, the ticket will remain with the company user.

How Problem Types, Status Changes, and Positions work

To help in routing a ticket within both medium and large companies, or companies that have multiple office locations, the system can be set up to use defaults to get the ticket to a user.



Defaults are associated with these items

So when a ticket of a certain problem type is created, the system assigns to it a default status. Since the status is associated with a certain step in the process of work to solve the problem, it has a default position associated with it. The application can then determine a user within that group of position holders and assign the ticket.

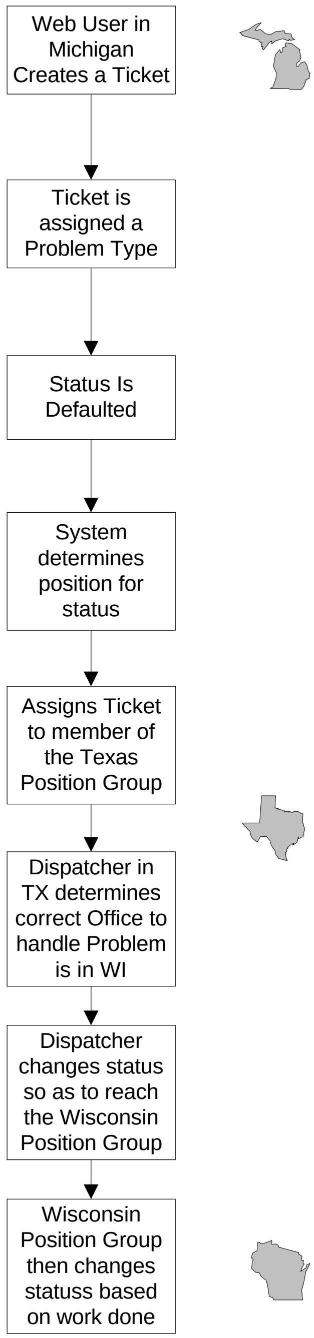
One could have a default status that will land the ticket in a dispatcher. If the ticket is incomplete, or vague – the dispatcher might be able to call the ticket creator for more information. Once the information is updated, the dispatcher could change the status to move the ticket to a position that is proper for the solution of the problem.

Some tricks can be set up with statuses to see the ticket gets to the right part of the country if the company is dispersed. A default status could be set up to send the ticket to a dispatcher. A group of status's could be set up - one for different part of the country. The dispatcher could realize the proper branch of the company the ticket should go to and set the status of the ticket to a status that is set up for that branch. The application would then use the positions associated with that status to identify a user to assign the ticket to in that geographical location.

The use of positions and statuses can be very powerful. It can be used to get the ticket to the right person in the right geographical area – even in a large company. As well as describe how much of the solution process has been taken place to deal with the issue provided by the customer user.

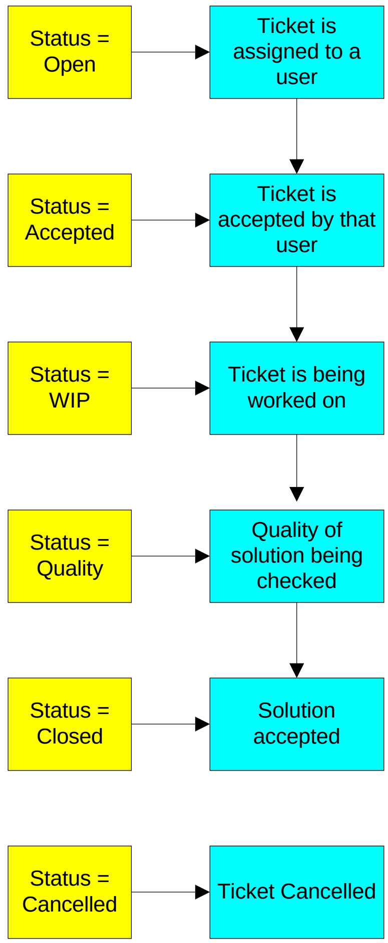
Using statuses to get a ticket into a geographical area

Following is a flowchart that could describe getting a ticket to the right person in the right geographical area:



Using statuses to describe the level of completion of a ticket

Statuses can be used to get the ticket to the proper people within a company to achieve the action that is to be done to finish the issue within the ticket.

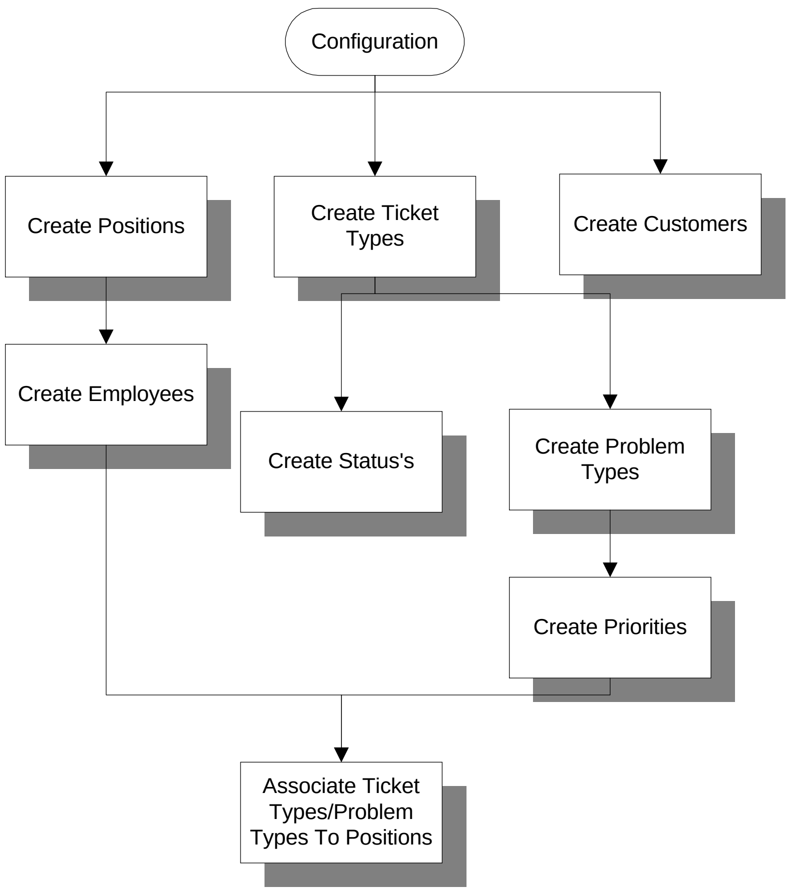


The status of a ticket can represent how far into the solution it has passed

The above flowchart describes using statuses to show how far into a workflow process the ticket has passed.

Configuration

The use of Service Express requires configuration of the software after it's installation. Configuration of the software means setting up the parameters of operation in order for the software to operate within the work flows of your company. A short flowchart of configurations and their order of set-up are provided below:



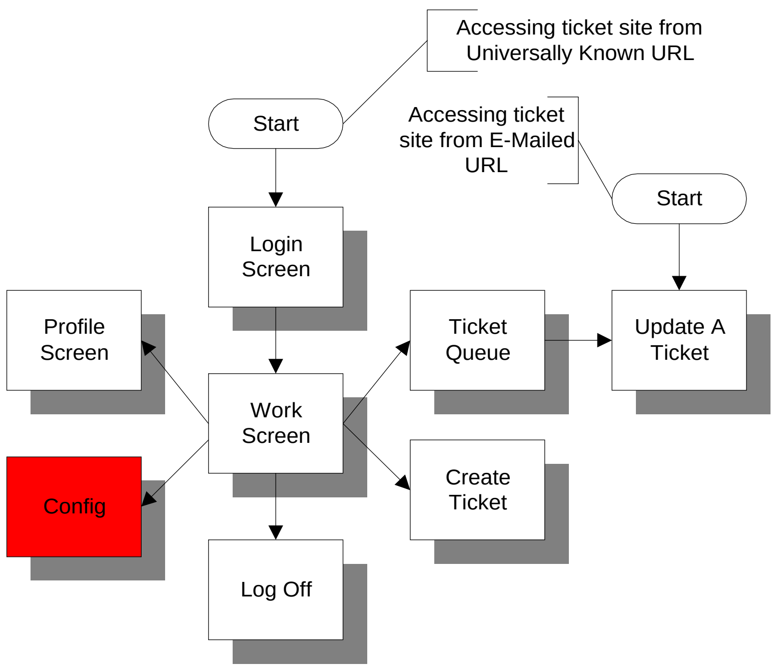
Steps for configuring Service Express

See the configuration guide for more information and details for performing these steps. It includes detailed instructions as well as work sheets to preplan the configuration.

Use of the Application

The following sections detail the use of the application by a Company User. See the Site User Guide for instructions on how a customer might use the site associated with them. See the configuration guide for information about how to set up the application to work under the work flows for your company.

The following is an overview of the screens you will encounter in the use of the application, as well as how to navigate between them:



The main screens available are as follows:

- Login – prompts for your user name and presents a password challenge
- Work Screen – this is the screen that all the other pages will delineate from. It contains your menu of functionality
- Logoff – allows you to log off from the site
- Create Ticket – allows you to enter the information to create a ticket. Note information entered in this screen appears in the customer site.
- Ticket Queue – displays the tickets that have been assigned to you
- Update A Ticket – allows you to enter information about a ticket into the ticket. Note that portions of this information is made available to the customer on their site.

- Profile – allows you to tell the system whether you are on vacation so it will not assign tickets to you. Also allows you to set up another user who would receive your tickets, as well as your contact information

Note that the configuration screen (denoted in red) is a restricted screen.

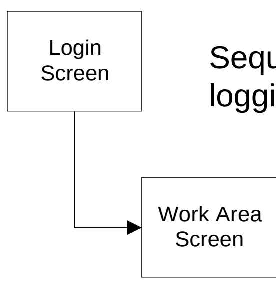
Each of the screens may have additional screens associated with it, but this diagram is meant to give you an overall view of the screens available within the application.

Logging into the application

Logging into the application is a requirement. It is through logging in that the application knows who you are to provide you with the ticket information of your concern.

Logging in is achieved by having your employee information entered into the system. See the system configuration guide for this information, or your system administrator.

Your system administrator will provide you a Universally Known URL to the application. This is different from a URL you might receive in an email from the application. The Universally Known URL will challenge you with a login and password prompt. By completing these fields you will be able to work your tickets.

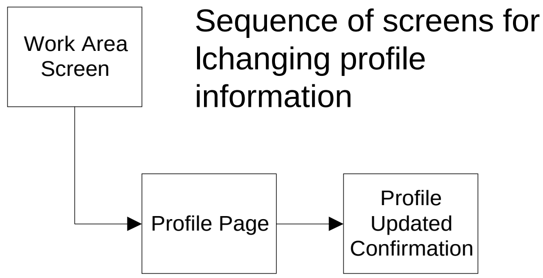


Sequence of screens for logging in

Once logged in, you will be presented with the Work Area screen where the functionality of the application will be made available to you.

Changing your password

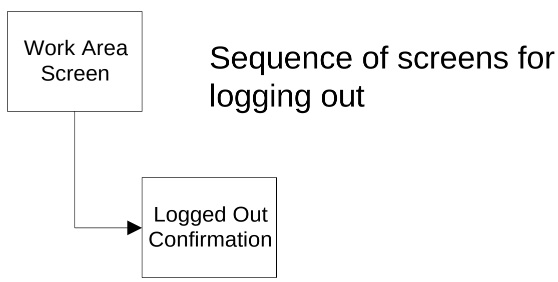
Changing your password is accomplished in the Profile screen. This screen presents various information about you such as your in and out times, vacation times, and contact information.



One chooses the Profile page from the menu on the Work Area screen. This will present an input screen whereby you can change information about your profile. By clicking Submit, you will issue your changes to the application which will present the Profile Updated Confirmation page.

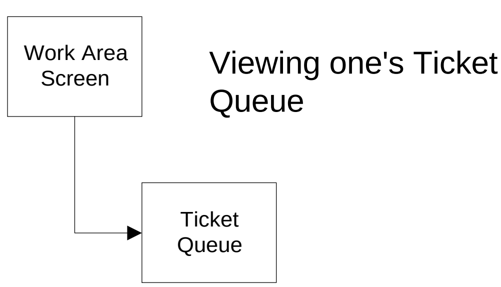
Logging out of the application

Logging out of the application is important. By logging out, you insure that your computer's browser can no longer be used to access the application.



Viewing your ticket queue

The Ticket Queue page is used to present you with the tickets that can benefit from your activities.

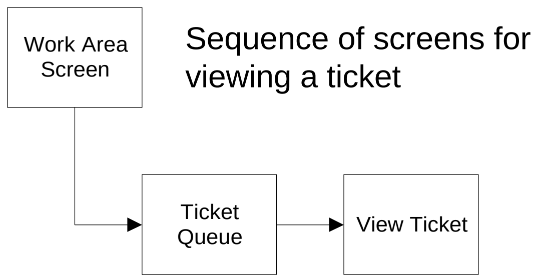


Getting to this list of tickets is accomplished by clicking on the Ticket Queue link on the menu found in the Work Area screen.

Viewing a Ticket

Viewing a ticket means traveling through some screens. One can view a ticket that is under your ownership, or search for a ticket that is owned by another.

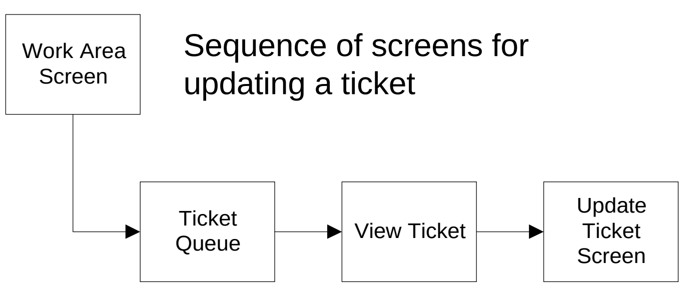
Starting from the Work Area screen, one chooses Ticket Queue which will list all your tickets. By clicking on the ticket number, you will be presented with the screen with the ticket's details.



The Ticket Queue screen also has a search capability to allow you to enter a certain ticket number to be viewed. This will allow you to review tickets that are not owned by you for complementary work on the ticket owned by someone else.

Updating a ticket

Updating a ticket is accomplished by searching for a ticket as with the View Ticket procedure. The View Ticket screen has a link "Update Ticket." It is with this link that you can enter a page that allows you to update a ticket.



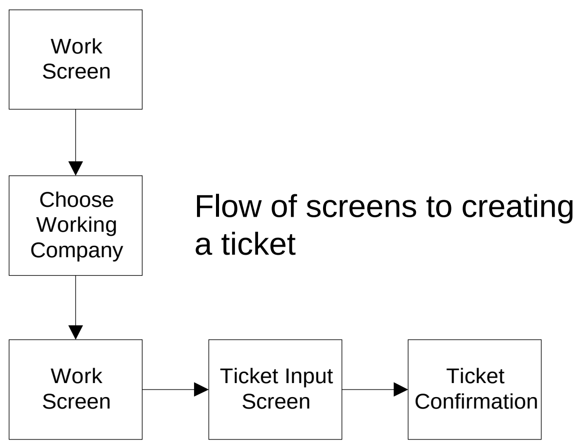
If the ticket is not owned by you, you will not be allowed to update the ticket in anyway except for a note.

Changing a ticket's status

Changing a ticket's problem type

Creating a ticket

Creating a ticket requires you find the customer. This is accomplished in the Choose Working Company screen. Once this is accomplished, you can use the application to work on that customer's data.



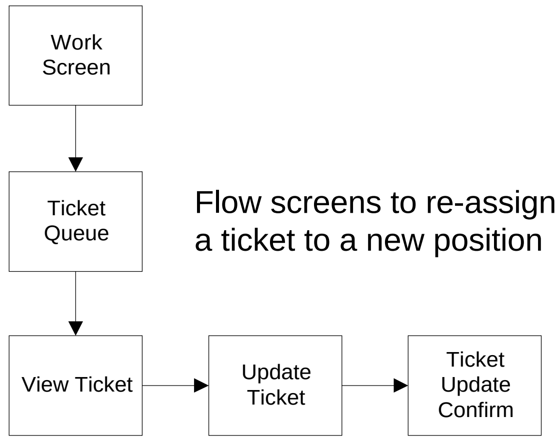
One would then input the customer's issue into the Ticket Input Screen and upon pressing Submit, the ticket would be created. The ticket will be routed as if the customer had entered the ticket.

Reassigning a ticket

The application allows users to re-assign their tickets to help with work load.

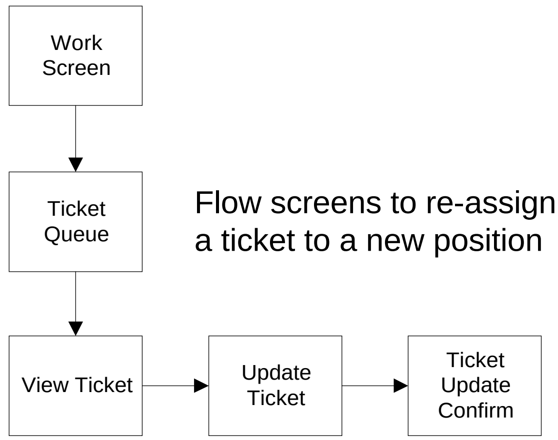
Reassigning by position

Note that if your ticket queue is less than that of others, the ticket may be re-assigned back into your ticket queue.



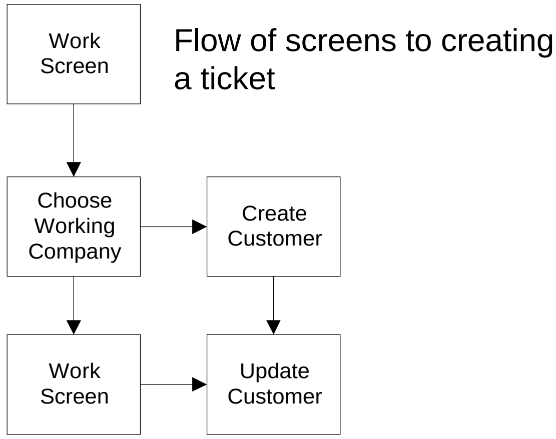
Reassigning by employee

A ticket owner can assign a ticket to another employee outside of those set in the positions for it's status.



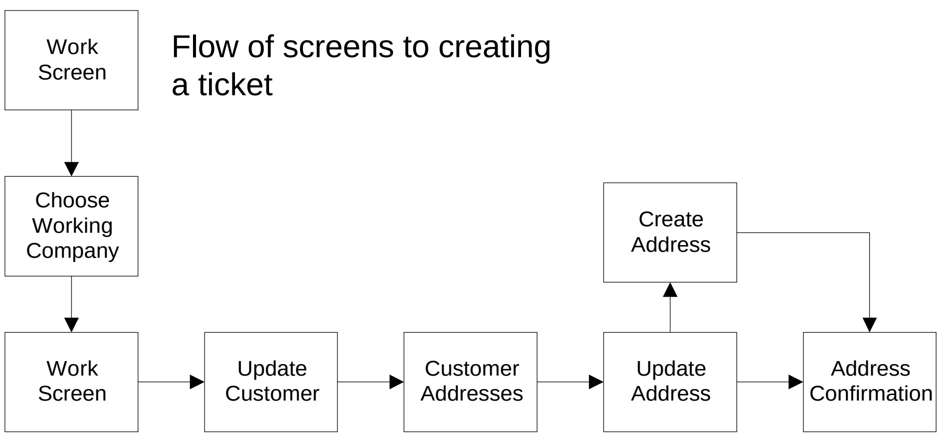
Editing Customers

Adding, modifying and deleting customers is done in the web pages composing the customer editor.



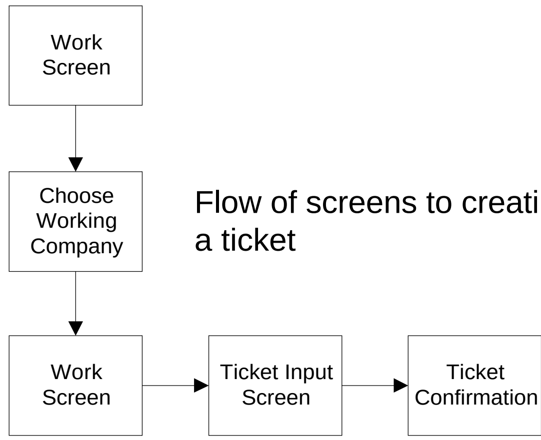
Editing Customer Addresses

A customer may have multiple addresses to work under. A Site User can add addresses for it's customer also.



Editing Customer Site User Accounts

A site user is someone from a company customer who uses the Customer Site. At times you may need to adjust parameters associated with them.



Flow of screens to creating a ticket

Note that a customer can create an account for themselves on the web site – however, an internal user will need to associate that account to a customer so that appropriate checks can be made they are who they say they are.