iBaan E-Enterprise

Administrator's Guide for E-Service 2.1 (SP1)

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Table of contents

About this document

This document is an Administrator's Guide that describes iBaan E-Service 2.1 SP1, a component of the iBaan E-Enterprise Suite of products for the Internet. This guide is intended for administrators who are responsible for the implementation of the iBaan E-Enterprise suite and describes the requirements to achieve a successful run of the iBaan E-Service 2.1 SP1 application from scratch. This document is also useful for those who already have iBaan E-Service 2.1 and are migrating to the SP1 release in filling the gaps and provided the entire information in the new perspective.

The contents of this guide complement the online Help, which contains more in-depth details, whereas this guide focuses on general procedures. The information in this guide is divided into the following chapters:

Chapter 1, "Introduction," describes the iBaan E-Service 2.1SP1 on a very broad level.

Chapter 2, "iBaan E-Enterprise Server architecture," describes the architecture of the iBaan E-Enterprise Server 2.5 SP1.

Chapter 3, "Navigation in the iBaan E-Enterprise suite," shows the navigation of the E-Enterprise product on the E-Manager pages.

Chapter 4, "Basic data setup," describes how to set up basic and common data to enable the E-Service application to function.

Chapter 5, "E-Service data setup," describes how to set up E-Service.

Chapter 6, "iBaan E-Service 2.1 SP1 Admin Utility," describes the options available to the Web administrator to control the NT Service programs when the programs are run manually.

Chapter 7, "Integration with iBaan ERP 5.0c," describes the required setup to integrate iBaan E-Service 2.1 SP1 with iBaan ERP 5.0c.

Chapter 8, "Mater data setup iBaan ERP 5.0c," describes the required setup to synchronize the master data of E-Service 2.1 SP1 with that of iBaan ERP 5.0c.

Chapter 9, "Integration with Baan IVc4," describes the necessary setup to integrate iBaan E-Service 2.1 SP1 with Baan IVc4.

Chapter 10, "Master data setup Baan IVc4," describes the necessary setup to synchronize the master data of E-Service 2.1 SP1 with that of Baan IVc4.

Appendix A, “Mail types in iBaan E-Service 2.1,” describes the various mail types available in iBaan E-Service 2.1.

Terms and definitions

Term	Definition
Back-end system	An information processing system to control business processes, such as the production and servicing of goods, including financial accounting. See also Business Information System.
BIS instance	An implementation of a business information system (BIS) for a particular company. For example, company 550 in Baan IV.
Business Information system	An information processing system to control business processes, such as the production and servicing of goods, including financial accounting. Acronym: BIS
Integration component	The Middleware connection that is used for communication between Baan E-Enterprise and the business information system (BIS).
Portal	A Web site that serves as a gateway to the Internet. A portal is a collection of links, content, and services designed to guide users to information the users are likely to find interesting, such as news, weather, entertainment, commerce sites, chat rooms, and so on. Examples of portals include Yahoo!, Excite, Microsoft's MSN.COM, and Netscape Netcenter.
Administrator	The person who sets up E-Service at a company site, who is also the person for whom this book is intended.
Business partner	A business partner can be a supplier, a customer, or both. The company with which your company does business.
Customer	A business partner who makes purchases from your company. A customer can also be a business partner who seeks the services of your company.
Supplier	A business partner who supplies indirect materials or services to your company.
Employee	A person at your company who is registered in the user profile, and is the contact ID known to Baan.

Reference

Administrator's Guide for iBaan E-Enterprise Server 2.5 (U7702A US).

1 Introduction

When customers have problems, they want excellent service immediately. The service could be in various forms, from unassisted mode of referring to a knowledgebase, to having some assistance from a call center. Typically, customers communicate with a call center by telephone to help resolve the issue.

iBaan E-Service 2.1 is a Web-based, unassisted, self-service application that enables the customers to do the following:

- Search the FAQ database using a combination search options.
- Troubleshoot with a diagnostic tool that helps customers find the source and best solution for their problem.
- Log service requests in a call center, such as breakdowns, questions, or complaints, which can be solved there.
- Create the link documents for the service requests in the back end in the form of calls or service orders to be attended to by the support center of a field service engineer.
- Look up the status of service requests both in stand-alone and integrated modes.
- Contact the help desk by telephone, e-mail, or FAX, and have a service request created on the customer's behalf.
- Enable a guest to register service requests.
- Publish some of the service requests to the FAQ database and provide relevant attachments, such as Microsoft Word documents or .gif images, to provide a detailed account of the issue at hand.

E-Service can be used in either stand-alone application or integrated mode. In integrated mode with the Baan IVc4 Service package, service orders can be created in SMA. In integrated mode with the iBaan ERP 5.0c Service package, calls can be created in CLM. However, at any point in time, only one of these three modes would be active, as determined during the installation. This amount of control significantly improves the level of service a customer is offered and receives.

2 iBaan E-Enterprise Server architecture

This chapter provides an introduction to and a description of the architecture of the Baan E-Enterprise Server 2.5 SP1 application. This application provides common services and is useful to other Baan E-Enterprise Web applications. These services are divided into the following three parts:

- Business components
- Run-time services
- Common functionality and tools

Each of these three parts is described in the following sections.

Business components

The business components of E-Enterprise Server are used in several Baan E-Enterprise Applications. Examples of business components include:

- Catalog
- Currency
- Business Partner
- Frequently Asked Questions
- Search

E-Enterprise Server offers these business components to other products as a service. For example, not all Baan E-Enterprise products use the catalog component. These components are delivered with manager pages, for example, to add items to a catalog or to change currency rates. All of this functionality can be added to applications through a subscribe mechanism. If E-Enterprise Server is installed in stand-alone mode, not all functionality is directly visible. For example, when E-Sales is installed, the currency link will be visible on the menu.

Catalog

The catalog component provides complete catalog functionality to the other Baan E-applications. This component also contains manager pages to maintain the catalogs. The catalog data is stored in a database.

Business partner

The Business Partner component controls the business partners. The Business Partner is pivotal in all the Baan E-applications. This component includes pages to manage business partners, shipping addresses, and so on. Business partner information is also used to request real-time information for the Baan back-end servers and to delegate user management tasks. For example, you can assign local administration rights to a user who is linked to a particular business partner. This user, in turn, can manage all users linked to this business partner.

Suppose your business partner B has ten users, and user X is the local administrator. User X can assign catalogs, dashboards, and so on to existing users linked to business partner B. Local administrator X can also create new users, but these users will always be linked to the same business partner: business partner B. The local administrator can only assign permissions, such as catalogs, dashboards, and so on, that are assigned to this local administrator through the delegated profile. Baan refers to this functionality as delegation of authority.

Frequently Asked Questions

You can use Frequently Asked Questions (FAQs), for example, for customer service Web sites. The FAQ functionality contains a manager part, where the administrator maintains the FAQs.

Search

The Search component performs indexing and searches on specific parts of the Web site. For example, when the catalog is used, an index will be built on the content of the catalog. Search also contains user pages where the user can enter questions. The search engine supports database and document search.

Run-time services

The Run-Time Services are the infrastructure components used for all E-products.

Examples of these services include the following:

- Membership
- Dashboard
- Authorization
- Configuration
- Data Synchronization
- Internationalization

Membership

The Membership component is used to manage users and profiles. This component is also responsible to connect to the LDAP server. This version of E-Enterprise Server supports only the iPlanet Directory Server (LDAP).

Dashboard

The Dashboard component is responsible to connect in real-time to the Baan back-end servers. Supported Baan versions are Baan IV and iBaan ERP. E-Dashboard is delivered with a set of manager pages, on which the system administrator can create and manage Self Service lookups, such as real-time lookups in the Baan back end, and so on. The Dashboard component can handle multiple Baan back-end servers and supports intelligent rules.

Authorization

The Authorization component is responsible to manage the log-on process of a user and asks users to identify and authenticate themselves. This component is written as an ISAPI filter in Internet Information Server (IIS).

Configuration

The Configuration component is responsible to read and write into the Baan E-applications configuration files. Rather than reading the configuration files directly, the configuration component is used. The configuration files, also called configuration stores, are defined as XML. These configuration stores are also used to subscribe to particular functionality.

Data synchronization

Data synchronization is used to synchronize data such as business partners, addresses, product data, and so on from the (Baan) back end to the E-Enterprise server database. The tools to synchronize are delivered on a separate iPack.

Internationalization

The Internationalization component displays language-specific labels. This component is also called I18N.

Common functionality & tools

This part provides standard functions such as display functions, coding standards, and so on to Web developers. These tools are very useful, for example, to customize the Baan E-products or to develop add-on pages. Examples include the following:

Libraries

To develop Web applications according to the standard Baan look and feel, libraries are delivered with E-Enterprise Server that contains standard functions such as grids, backgrounds, error handling, and so on. These libraries are useful for customers and Baan developers to customize the standard E-applications or create new functionality.

Coding standards

Coding standards are part of the E-Enterprise Server product when the customer has access to the source code. The coding guidelines provide standard coding rules and performance hints.

Component checker

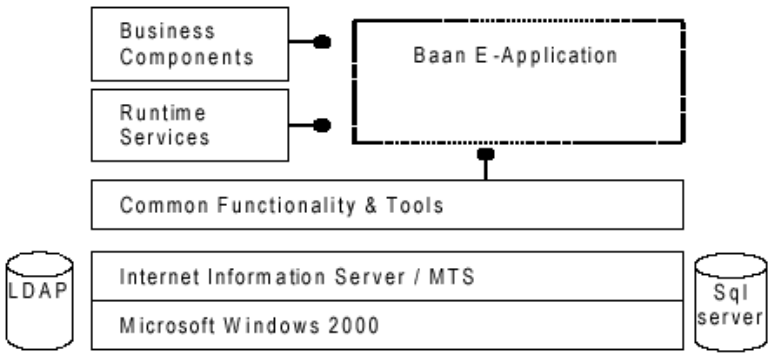
The component checker is very useful to check whether a Web server contains the correct versions of certain software. This utility checks all external DLLs or software components that are used in the Baan product.

Remote help desk utilities

The remote help desk utilities provide a support look from a remote location. With these utilities, Baan support can check which software is installed, which versions, and whether customizations are performed on the standard software.

Architecture

The following figure shows the E-Enterprise Server architecture. E-Enterprise Server consists of services that other E-applications can also use. Note that the Common Functionality & Tools layer is a set of libraries and utilities:



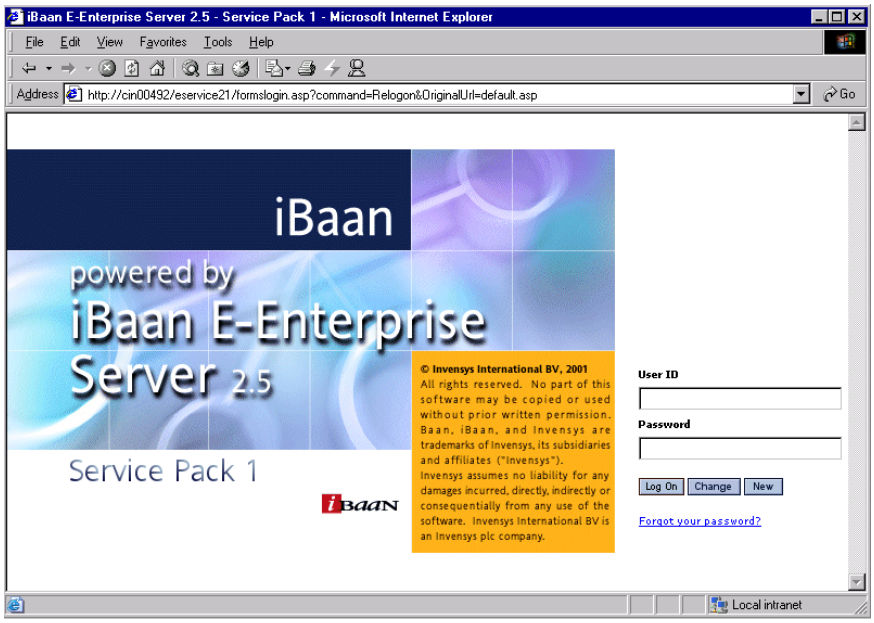
Platform support

Because E-Enterprise Server is built using Microsoft Visual Basic (VB), Active Server Pages (ASP), and C++, platform support is limited to the Windows 2000 platform. E-Enterprise Server supports Microsoft SQL 2000 as a database. iPlanet has been chosen as the preferred directory server (LDAP). Platform support of this directory server is limited to the supported platforms of iPlanet. In general, this includes NT, Windows 2000, several UNIX flavors, and Linux.

3 iBaan E-Enterprise suite navigation

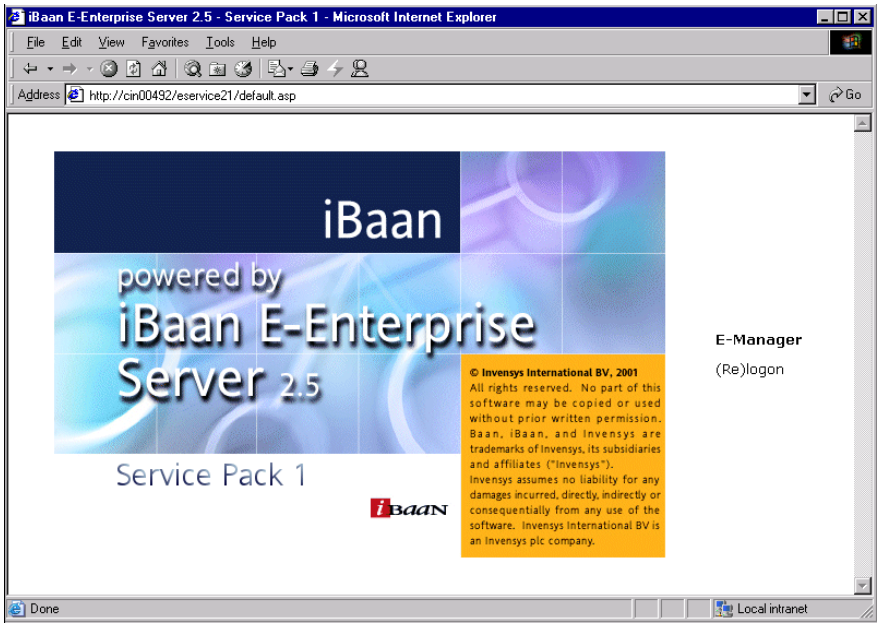
This chapter provides an overview for a Web site Administrator to navigate through the various pages in the administrator domain of the E-Enterprise product suite.

This chapter provides the administrator with the Web site at which the iBaan E-Service 2.1 SP1 product has been successfully installed. When this site is accessed, the administrator is presented with a page that enables them to log on to the site. The following figure shows the Login page:

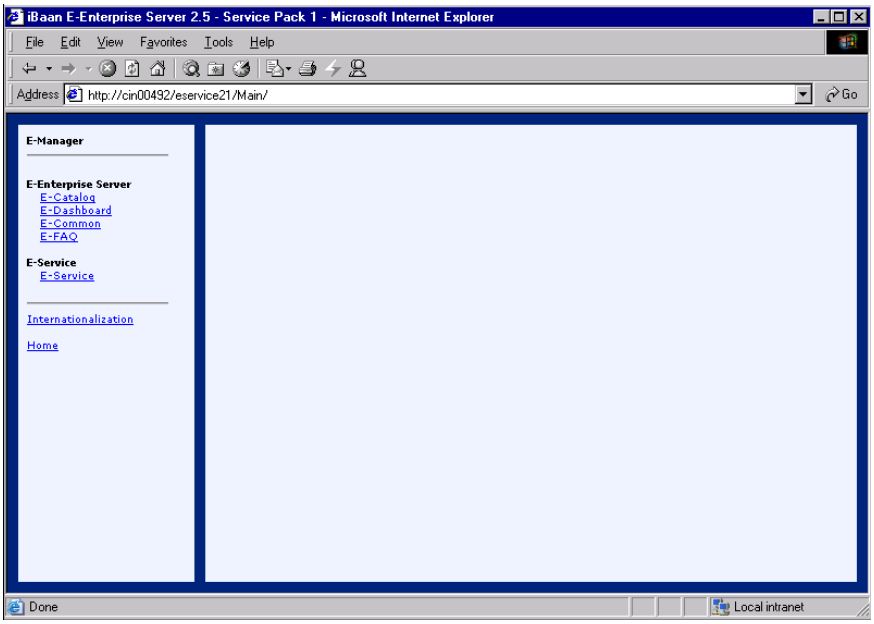


The default login and password that is provided by the application for the Web site administrator to access the administrator pages are **administrator** and **baan,** respectively. The user musst change these values immediately upon installation of the product.

After the administrator logs on to the Web site with the appropriate login and password, the user is presented with the default page of the Web site, as shown in following figure:



Web site administrators can click the **E-Manager** hyperlink to configure the Web site for other users to access the site. The hyperlink presents the default page for the Web administrator, which is shown in the following figure:



The following sections list and describe the various products of the E-Enterprise product suite that the Web site administrator can use to set up iBaan E-Service.

For a more detailed explanation of the data setup in E-Common, E-Catalog, and E-Dashboard manager pages, refer to the *Administrator's Guide for iBaan E-Enterprise Server 2.5* (U7702A US).

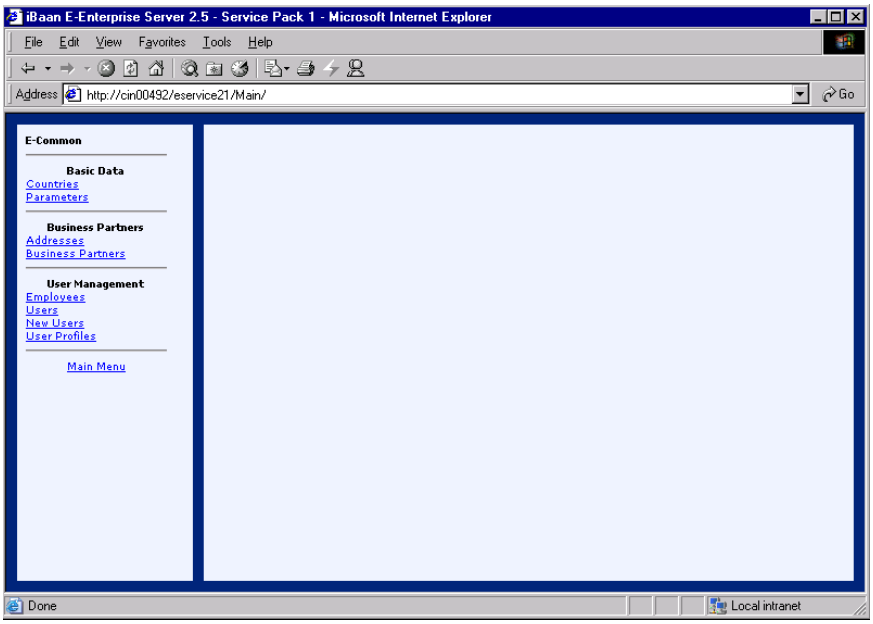
E-Common

E-Common provides basic data for the entire Web site to operate with user-related information and some vital parameters.

The **Basic Data** section handles creation of the countries and maintains some common parameters such as guest information and other vital information.

The **Business Partners** section aids in creating the business partners and linking them with BIS Customers.

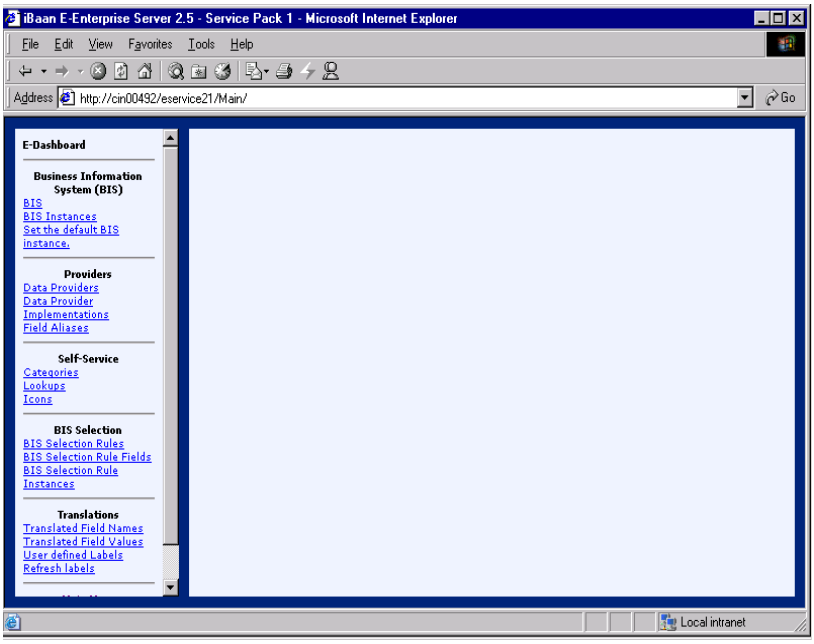
The **User Management** section is used to create users and give them various roles in E-Service, based on the requirement and ensuring that appropriate visibility is associated with each of the users defined.



E-Dashboard

E-Dashboard provides the critical integration between the E-Enterprise product suite and Baan back office application. E-Dashboard enables the administrator to do the following:

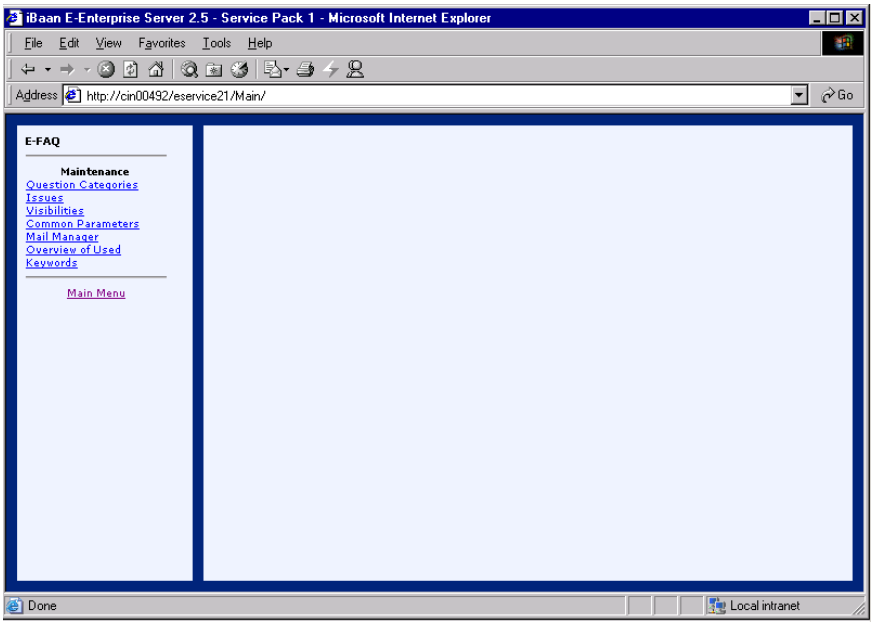
- Define the particular middleware that is used for data transfer. E-Dashboard defines Business Information Systems (BIS) to define the required middleware. In this release, the middleware is iBaan OpenWorld.
- Access details of the iBaan ERP system, called BIS Instance in E-Dashboard, to retrieve and send data.
- Use user-defined rules to retrieve data from iBaan ERP. A rule can determine from which iBaan ERP system or iBaan ERP company data is retrieved.
- Use E-Dashboard to define BIS selection rules, BIS selection rule fields, BIS selection rule instance, and BIS selection rule instance field values to set up the required data. E-Service uses a BIS rule called Business Partner.



E-FAQ

E-FAQ manager pages are used to manage information that is crucial for creation and maintenance of the Frequently Asked Questions. This set of manager pages is used exclusively for the E-Service application only.

The common parameters primarily control the FAQ Change Notification mechanism. Apart from that, the E-FAQ manager pages maintain the question categories and visibility-related information that is vital for creation of an FAQ along with the mail-related parameters.

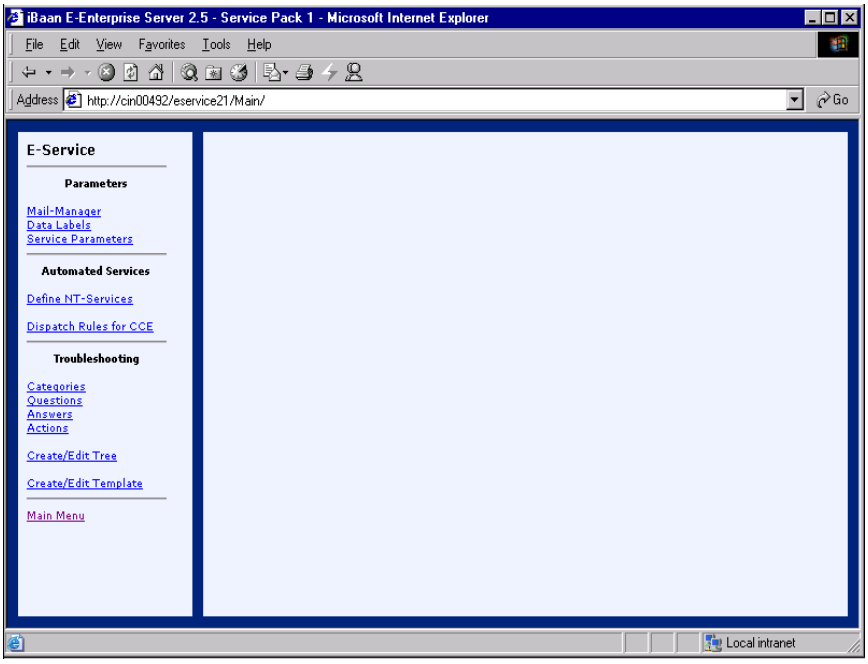


E-Service

iBaan E-Service 2.1 is an intranet and internet-based application that works as a stand-alone package, or that can be integrated with any other back-end ERP system or legacy system. The administrator is also provided with a client interface that is used to operate particular tasks otherwise unmanageable by the Web interface.

An administrator can perform the following functions:

- Define parameters that govern the functioning of iBaan E-Service 2.1.
- Defines dispatch rules for engineers of call center and support center.
- Define Troubleshooting Repository content.
- Define Troubleshooting Trees/Templates.
- Manages the synchronization of the master data.
- Manual invocation of the NT Services.
- Archiving the database when required.
- Customize mail types based on the required language using Data Labels.



4 Basic data setup

This chapter describes the procedure used to set up the basic data as required to enable iBaan E-Service to work in stand-alone mode. The areas include E-Common, E-Catalog, and E-Dashboard. For a detailed description, refer to the *Administrator's Guide for iBaan E-Enterprise Server 2.5* (U7702A US).

Chapter 5, “E-Service manager pages,” describes the setup of E-Service-related data. Chapters 7 through 10 describe the setup of iPacks, E-Dashboard, and master data, which also describe the iBaan E-Service 2.1 integrated mode of working.

NOTE You must set up this basic data before you use the application, in accordance with the instructions laid out in this document. Any subsequent adjustment or modification of the parameters must be understood in the context of implications. Wherever necessary, appropriate instructions and the related implications are listed throughout the document.

E-Common data

To maintain the **E-Common data**, click **E-Manager → E-Common**.

Basic data

In the E-Common parameters, define the way the application must function. In the parameters, if the **Enable Guest** field is set to **True,** the **Default Guest** user setting is used. For more information, refer to the User Management section of E-Common. This enables the user to browse through E-Service without logging on to the application. For a prospect functionality of E-Service to be active, this requirement is mandatory. Any modification of these E-Common parameters requires you to restart the Web application.

In addition to this and other parameters, the following information related to business partners and user management must be maintained for E-Service:

- Countries.
- Addresses.
- Business Partners.
- Employees.
- Users.
- User Profiles.

User management

Users are individuals who access the Web site. Users might work for the company that owns the site, in other words, the service provider, known as th internal users, or the business partners and their employees, known as the external users. All the users of E-Service must have a valid Web login when the prospect viewing is not allowed.

Users

Apart from other vital information, the user can be linked to a business partner.

If **FAQ Visibility** is selected**,** the types of questions and product categories the user can see can be defined. If a user has access to information that is defined for various FAQ visibilities, multiple FAQ visibilities can be defined. For example, if a user must have access to the information that is defined for the FAQ visibility **Customer,** and to the information that is defined for the FAQ visibility **Dealer,** then, for this user, both FAQ visibilities must be defined.

In the E-Common common parameters**,** a default guest user can also be specified. In the user data of the guest user, the rights of an anonymous user can be defined, for example, the **FAQ Visibility**. If a guest user must access the site, some basic visibilities can be defined in the user's name.

User roles is an effective way and means to define the user who accesses the Web site of E-Service application. These user roles are used to build up the E-Service menu and are used for security purposes. The following user roles can be specified for a user:

- **Support Agent:**
  A user who can create service requests on behalf of a registered user or a guest user.
- **Call Center Engineer:**
  A user who operates in the call center. Call center engineers are responsible for the service requests that are assigned to them in the call center.
- **Support Center Engineer:**
  A user who operates in the support center. Support center engineers are responsible for all the service requests that are assigned to them in the support center.

- **Dispatcher:**
  A user that assigns or re-assigns service requests to an engineer. The dispatcher can belong to a call center or support center. When the dispatcher dispatches in the call center, the dispatcher is referred to as the call center dispatcher (CCD) and the service request is assigned to a call center engineer. When the dispatcher dispatches in the support center, the dispatcher is referred to as a support center dispatcher (SCD) and the service request is assigned to a support center engineer.
- **Supervisor**:
  A user who can use some search criteria to search for the service requests. The supervisor can belong to a call center or support center. When operating in the call center, the supervisor is referred to as the call center supervisor (CCS). When operating in the support center, the supervisor is referred to as the support center supervisor (SCS). Generally, the supervisor is also given the rights of a dispatcher, as well as the rights of a call center engineer or a support center engineer, as the case may be. This enables the supervisor to reassign or answer service requests.
- **Publisher:**
  A user who can add and edit Frequently Asked Questions to the knowledgebase. One of the ways to add FAQs is through service requests.
- **Privileged user:**
  A role that must be given to an E-Service user when the application is integrated with iBaan ERP 5.0c. This parameter, coupled with some others, enable the user to directly register the call in the call center or support center.

NOTE Each role has a unique purpose. For example, if a supervisor wants to reassign a service request, the supervisor must have dispatcher permissions. No defined hierarchy exists in the roles that would automatically translate the responsibility to another user in the tree. The hierarchy must be explicitly declared.

The following assumptions are crucial that must be noted in the context of roles being defined and the relevant data being set up in iBaan E-Service 2.1:

- The roles of dispatcher and supervisor have a single option each for both call center and support center. Separate roles, including call center dispatcher, support center dispatcher, call center supervisor, and support center supervisor, would be created and used in the next version. Individual agenda can be determined based on the user interface distinction that has been provided.

- For a support center engineer, the Web login must be the same as the iBaan ERP login and the E-Service Employee name must be the same as the iBaan ERP employee. For an external user, the BIS customer must match the back-end business partner.
- The support center dispatcher must have a valid back-end iBaan ERP login with the same name in iBaan ERP to enable the dispatcher to create calls.
- An internal user can be removed only after the user fulfills the items in the agenda. In a future release, the supervisor who handles all such cases when an internal user, if absent for some reason, would be considered.

Each of the users of the E-Service application must have the **Applications** option set for E-Service and the user type for any of the previous roles can be **Registered User**.

E-Catalog data

To maintain **E-Catalog** data, click **E-Manager → E-Catalog**.

For E-Service, the following data in E-Catalog must be maintained:

- Product: Used for the troubleshooting function.
- Product category: To categorize the products, the Frequently Asked Questions and the service requests that are raised.

Products

In the Troubleshooting manager pages, start questions can be specified for the defined products. For this reason, the part number and the product description must be specified for the products for which a troubleshooting tree must be defined.

Product category

To define the product category by user, select the appropriate FAQ visibility. Products belong to a product category. To add or delete a related product, you must use the **Products by Product Category** hyperlink. A search function is provided to support a link of the products to the product category.

E-Faq data

To maintain the **E-Faq**, click **E-Manager → E-FAQ**.

Question categories

You can use question categories to categorize the FAQs and the service requests that are registered with E-Service.

Visibilities

With FAQ visibility, you can specify what type of FAQs users can view. On the Edit FAQ Visibility page, you can specify the FAQ visibility.

Issues

On the Issue page, you can use the **Add Issue** link to add FAQs or click the respective FAQ ID to edit an FAQ.

To categorize FAQs, you can specify the **Product Category** and **Question Category**. You can use these categories when you search the FAQ knowledgebase.

The **Description** briefly describes the subject of the FAQ. This short description is used in a view that lists FAQs. Users can use this list to select an FAQ.

In the **Question and the Answer** field, you can specify the detailed question and answer description. The **Display Mode** indicates the way the question and answer text can be interpreted: either as HTML or as plain text. If HTML is used, you can also include pictures in the question and/or answer text. These pictures must be stored on the Web server and through a relative path. The pictures must also be indicated in the question or answer text.

To provide feedback, users can indicate, for each selected FAQ, whether the content of the FAQ helped them. For this reason, voting buttons are available on the detail page of any FAQ, which the user can use to indicate whether the FAQ solved his problem. These votes will be registered for each FAQ by registration of the **Number of Votes** and the **Ratio**. On the FAQ issue page, you can edit the **Number of Votes** and the **Ratio**. The voting information will be used to sort the FAQ Search result list. The **Date** will be registered that the FAQ has been added to the knowledge base. This date can also form part of the selection criterion when a FAQ knowledge base is searched. During the search, you can indicate to show only those FAQ entries that have been entered before or after a specific date. In addition, the date will be used to determine whether the **New Flag** must be shown for the FAQ. In addition, whenever an FAQ is added, the **Hit** count for that FAQ increases.

Attachments such as a document or a presentation can be linked to an FAQ entry. To add or delete attachments, you can click the **Add/Delete Attachment** hyperlink. To link a Web site to an FAQ, you can specify the hyperlink in the **Link** field.

By means of the **Visibility,** you can indicate the type of user that can view a particular FAQ. When a user searches for an FAQ using, for example, a category and/or a keyword, the visibility in the FAQ will be compared with the FAQ visibility of the user. Only when they match with any of the visibilities the user has will the FAQ be shown to the user.

If an FAQ is changed, at a later moment, after the change is published, the amount of change can be classified as **Major/Minor**.

Using the **Duplicate** button, the content of an FAQ can be copied to a new FAQ. This enables the user to link the FAQ to a different product and/or question category and publish the same FAQ with some alteration in content for multiple visibilities.

E-FAQ parameters

Common parameters

The directory in which the attachments will be stored can be indicated in the attachment directory. The directory must be available on the Web server. With the **New Expiry** parameter, the number of days the new flag is shown for a Frequently Asked Question can be specified.

FAQ notification parameters

The **Mail Notify** indicates whether the FAQs that are updated must be sent as mail to all the users on the notification list for that FAQ. If the mode is **Yes**, an e-mail message will be sent. If the mode is **No**, no message is sent and the subsequent options are totally blocked from the view of the administrator.

The **Mode Mail Notify** takes two values, **Periodic** and **Immediate**. **Periodic** indicates that an active background process would be used to send the updates to all users who are on the notification list for all those FAQs that are updated with change classification as **Major**. If the value is **Immediate**, the e-mail message is sent immediately as soon as the update is made on the FAQ with change classification as **Major**. Only when the mode is **Periodic** does the administrator can see the subsequent options for this set of parameters.

The **NTS Mail Notify** indicates whether NT Service process that must send e-mail messages is active when set to **On**. Otherwise, this field is **Off.** If the service is **On**, the **Interval** option also appears, which indicates the frequency, in minutes, with which the NT Service must operate.

Overview of used keywords

To check the information that customers enter into the search engine, the keywords used will be registered. Every time a keyword is used, the number of times the keyword is used increases. If the keyword has not been specified, the keyword will be added to the list of used keywords. This information can be used to improve the used wording, for example, if warranty is used as a keyword, but the users use guarantee instead, the wording can be improved.

Mail manager

Some predefined set of mail types required for the FAQ change notification are listed here. During situations such as modification and deletion of FAQs, based on parameters, these templates are used to dispatch e-mail messages to the users on the notification list for the affected FAQs. For more details about the mail types used in E-FAQ, refer to Appendix A, “Mail types.”

5 E-Service manager pages

To maintain the data relevant to E-Service, click **E-Manager → E-Service**. The user must have administrator privileges given to him to work on the following pages. A user with the Publisher role can access troubleshooting-related pages described here.

Parameters

Mail manager

The Mail Manager lists all the available mail types along with the ID and the description and to whom that e-mail message is sent to the current application, the last two being information fields. These formats are the mail formats that are dispatched during various situations based on some events. The mail types used in E-Service application are listed in Appendix A, “Mail types.”

A click on the **ID** leads to the Modify Mail page where you can edit the message and the contents. The **From** field is used to store the address from which the e-mail message is sent to the user. Generally, the address is a common e-mail address. For example, the address can be Eservice@baan.com. The **Hyperlink Path** must be filled in the format as specified in http://<machine>/<virtualdir>/ where the Web server and virtual directory indicates the machine and the directory where the Web application was installed.

The **Attachment** section indicates whether or not an HTML file must be present when you use the **Create HTML File** option to send the e-mail message. The **XSL File Path** specifies the location where the XSL is stored. This HTML file is applicable to only some mail types, as listed in Appendix A, “Mail types.”

The **Add New Solution Mail Type** link is used when the service provider wants to add their own mail type to answer the customer when a solution to a service request is provided.

Data labels

Each of the mail types has some associated values: **Description**, **Subject**, and **Body**. These values in these fields are actually data labels. Using this facility, the e-mail messages are dispatched to the receiver. An advantage to the service provider would be if to equip these e-mail messages with the latest information whenever required when dispatching these messages. This point is one of the primary reasons why these labels are maintained as data labels rather than as I18N labels. The I18N labels can also be used, but would require some extra effort from the administrator of the system to refresh labels, which you can now avoid.

To modify the content of an e-mail message, click the **Data Labels** option. Select the data label that corresponds to the e-mail message you must modify to make the changes. You can link a label to a language and e-mail combination.

The standard mail types that come with installations include this facility.

Service parameters

General parameters

Allow Prospect accepts a Boolean value and indicates whether the functionality enables guest users to use the site in which case the value is **True** or, otherwise, when the value is **False**. To use this feature, guest logging must be enabled in E-Common parameters.

The **Archive After** field takes a value in days that is the minimum time after which service requests can be archived after the requests are closed.

The **Archive Location** is the place where the archives are placed. Currently, this must be there on the Web server itself.

The **Back Office Application**, which is a read-only value, provides the mode in which the E-Service is working at the moment. The installation program directly updates this value, which can have three modes: **None (0)**, **Baan IVc4 (1)**, **iBaan ERP 5.0c (3)**.

Then **Dispatcher Escalation Mail** accepts a Boolean value. The value is **True** if an e-mail message must be sent to a dispatcher in case of an escalation, and **False** otherwise.

The **Engineer Escalation Mail** accepts a Boolean value. The value is **True** if an e-mail message must be sent to a engineer in case of an escalation, and **False** otherwise.

The **Escalation Mail** is a company-level parameter that accepts Boolean. When set to **False**, this value would disallow sending escalation e-mail messages to the dispatcher, engineer, and supervisor. The dispatcher, engineer, and supervisor Escalation parameters require this parameter to be set to **True** when the e-mail messages must be sent to one or more recipients. The parameter is applicable to both the call center and the support center.

The **Manual Dispatching** field governs the behavior of dispatching when performed manually. If the value is set to **Use Dispatching Rule**, when a dispatcher dispatches a service request, the list of call center engineers appears in the order specified by evaluating the dispatch rules of each of the call center engineers. If the value is set to **Do not use dispatching rule**, the dispatcher receives the list of call center engineers in alphabetical order.

The **Max Dormancy Time** is the minimum time, in days, after which a guest user's information can be deleted.

The **Max Hours Assigned** indicates the time, in hours, after which an service request assigned to a call center engineer shows up in the **Engineer - Urgent** list.

The **Max Hours Registered** indicates the time, in hours, after which a service request with the Registered status in the call center appears in the **Dispatcher - Urgent** list for the call center dispatcher.

The **Max Hours SCE Assigned** indicates the time, in hours, after which a service request assigned to a support center engineer appears in the **Engineer - Urgent** list.

The **Max Hours SC Queue** indicates the time, in hours, after which a service request in SCQueue statuse appears in the **Dispatcher - Urgent** list for a support center dispatcher.

NOTE The **Max Hours SCE Assigned** and **Max Hours SC Queue** are relevant when an iBaan ERP 5.0c integration is in place. Otherwise, these fields do not have significance.

With the **Page Records** field, you can specify the number of records that will be shown in a list view.

The **Reminder Time** takes the time, in hours, after which a reminder e-mail message will be sent to the service request originator, who is provided with a solution. The time when a solution was provided to the request is taken into account as to when the e-mail message must be sent.

The **Supervisor Escalation Mail** accepts Boolean value. The value is **True** if an e-mail message must be sent to a supervisor in case of escalation, and **False** otherwise.

The **Conclusion Time** accepts the time, in hours, after which a service request is Concluded in the event of no response for the solution provided. The time at which service request is provided with a solution forms the Basis. Note that this conclusion time is greater than the reminder time.

NOTE If you find another set of items as **Back-end Parameters**, refer to Chapter 7, "Integration with iBaan ERP 5.0c," or Chapter 8, "Master data setup iBaan ERP 5.0c," based on whether the integration is with Baan IVc4 or iBaan ERP 5.0c.

Automated services

Define NT-Services

E-Service supports the following NT Services:

Archive helps in archiving the data from the QUESTIONHISTORY table. This table has all the end-state, PUBLISHED, CLOSED, and CANCELLED, service requests and, if required, the supervisor or the administrator of the Web system can archive these requests. However, the user of the service request can still see the requests when they search the archives.

Delete removes obsolete records, in other words, the service requests that have not been submitted and the attachments that are linked to each of these service requests. In addition, all the XML files that are created at the time of dispatching are also cleared.

Dormant User Expiry is used to delete the prospects that are dormant for specified amount of time.

Reminder reminds the service request originator about the service requests for which no response is received even after a solution is provided. This NT service automatically handles all the service requests that are due for a response from the customers. Every service request will have a time set as part of the Solution Provided e-mail message, the customers will receive a reminder e-mail message after that time passes. Every service request will have a time set. As part of the reminder mail, the customer will receive a conclusion mail after that time passes.

NOTE Every time this service is run, a log file is updated. For example, if the installation directory is C:\Program Files\Baan\iBaan E-Enterprise Server, a folder C:\Program Files\Baan\iBaan E-Enterprise Server\BESvcLog is created, which will hold all the log files for each of the NT services. Typically, the names of the files will be <ntservicename>_log.txt. As a result, if a service has the name BESvcCleanupSvc.exe, the log file will be BESvcCleanupSvc_log.txt.

NOTE All the NT services stop when the server is shut down, even though the services are set to **Yes** in E-FAQ and/or E-Service parameters. The services must be updated with the required Status after the NT is restarted.

Dispatch rules for CCE

Weights for call center engineer

The dispatching functionality can automatically assign the service requests to a call center engineer based on a number of criteria. These criteria can be set in the **Dispatching Weight** when you click any of the following weights.

For each call center engineer, you can specify the following criteria:

- Business Partner
- Country
- Keywords
- Language
- Product Category
- Question Category
- Regional setting

Initially, all the values here are set to zero. You can set these values with any integer value in the range 0-1000. If these values have a non-zero value, no two criteria can have the same value.

Rules for call center engineer

Each of the dispatching rules is in the name of a call center engineer. For every call center engineer, the status Dispatching Weights, along with the Queue Size and the Experience for a given call center engineer, determines the way a given service request is assigned.

Add New Dispatching Service is used to create a new dispatch rule for a given call center engineer. When that link is clicked, you go to the New Dispatching Rule page where, for a given call center engineer, you can assign the dispatching criteria.

The **Status** can be set to **On** or **Off**. When set to **On**, the automatic dispatching considers the particular rule for assigning the call center engineer to a service request that is registered.

The **Engineer** field lists the entire internal users that have the call center engineer role. Any engineer who already has one rule will not be listed in the field there. For a given call center engineer, only one rule can exist.

NOTE The administrator must manually ensure that the engineers listed here are the engineers who have call center engineer rule. If a user, who earlier had the call center engineer role, has that privilege removed in his user profile, the administrator must manually delete the relevant user record.

NOTE You must have at least one rule defined if automatic dispatching must be enabled.

The **Product Category**, **Question Category**, **Business Partner**, **Countries**, **Languages** and **Regional Settings** have a select option, using which one or more of the options listed can be selected against the criteria.

The **Keywords** field is a text field which lists some keywords, which can also be specified as the criteria.

For automatic dispatching, when a service request is created, all dispatch rules with the On status is taken and each of the criteria are evaluated for a match against each of the call center engineers. Wherever a match is found, points are added for each engineer. In the final tally, the call center engineer with more points would be assigned the service request. In case of a tie, the queue size of the call center engineers that have the same score are compared and the service request is assigned to the call center engineers with the least number of service requests against. In case of a tie at this level, the call center engineers with the most experience is considered and the service request is dispatched. In case of a deadlock, the service request is assigned randomly to among the call center engineers that have same scores on all counts.

In case of manual dispatching, the steps are followed in the same sequence except that all the call center engineers are considered for the assigning of the service request irrespective of their status or dispatching criteria and the final ordered list is evolved in line with the previous set of criteria.

NOTE The dispatching in the call center and support center use the same set of parameters but are maintained differently. This setup is designed to accommodate the future changes and not have an overlap in dispatching and each can extend in its own way. The DISPATCH RULES maintained for the call center engineer or support center engineer must have appropriate users with those roles present in the membership. Not maintaining these rules can lead to unpredictable results. As a result, if a user is deleted from membership, then ensure that the DISPATCHING RULE does not exist for that user in the call center or the support center.

Troubleshooting

The troubleshooting functionality is aimed at providing the user with a mechanism to easily identify a problem they can experience on a given product through a series of cause-effect-solution analysis. Consisting of a series of questions, answers, and associated actions, all taken from a repository, troubleshooting is supplemented with relevant FAQs at every level. The entire tool is in the form of a tree that is specific to a given product. An option to maintain some common repetitive structural occurrences in templates also exists. The management of the troubleshooting tool revolves around maintaining repository, tree, and template.

Repository maintenance

Repository consists of the essential data that goes into construction of a tree. The repository includes Troubleshooting categories, Questions, Answers, and Actions. The following links can be found under **Troubleshooting**:

Troubleshooting categories

This link is a list of categories, the classification of which helps the user group the problem causes for a specific product. Because these categories are defined by an administrator or publisher, the user has greater flexibility to order or arrange the content while building the tree or template.

Questions

Questions consist of a total list of items, along with a short description and a long description for details. These items are a series of causes that define the nature of the problem that the user who is seeking assistance might experienced.

Answers

Answers consist of a total list of items, along with a short description and a long description for details. These items are a series of effects or reasons to address the problem that the user who seeks assistance might experience.

Actions

Actions consist of a total list of items, along with a short description and a long description for details. This link is generally a list of suggestions or possible steps a user might have to take to resolve a problem.

A modification on each of the repository items involves updating the content (short description/long description) across all the trees where a particular repository item has been used.

Tree maintenance

A tree is a structural grouping of all repository elements aimed at providing a solution to a problem being faced by a user on a given product. The link **Create/Edit Tree**, as the name suggests, helps create and define new tree structures as also modifying the existing tree structures. If you click this link, a list of product categories appears. Upon selection of a product category, an associated product is shown. A product selected further might or might not have an associated troubleshooting tree. Some of the tree-related operations is described in the following list:

- Create
- Edit
- Search
- Expand/collapse
- Print
- Delete Tree

Create tree

If the troubleshooting tree does not exist for this product, the user has the following options to create a new tree:

- **New**:
  To create the tree afresh. Using this option, the user must create a tree from scratch and attach each and every node as the tree is built.
- **From Template**:
  To create the tree from a template. Using this option, the user can create a tree from an existing template. After copying the basic form, the user can then start to edit the tree.
- **From another Tree**:
  To create a tree from another tree. Using this option, the user can create tree from another existing tree. After copying the basic form, the user can then start to edit the tree.

To create the tree afresh
The user can use the items in the repository or dynamically create the items while building the tree, simultaneously adding the items to the tree and repository. The copy & paste functionality can be used, through which a structure can be copied from an existing tree and paste the same in the current one. Copy & paste operates under particular rules and boundaries to be detailed later. The items are uniform during both creation and editing. The nodes can also be taken from existing templates. In this case, a template consists of a sub-structure of a given tree that is seen as being used in multiple places. The basic process of the tree creation is equivalent to editing the tree content. All the operations that are a part of this are detailed in that section.

To create a tree from a template
The template is a basic building block that maintains the most commonly used structural details across trees. A user can create a tree from only that set of templates that has only troubleshooting categories as the top-level nodes. After a structure is selected, the visibility related details are propagated down the trees based on a particular sequence, as described in a later section. After the user creates the basic structure, the user can now start to edit the tree content.

To create a tree from another tree
An existing tree is another form that can be used to create a fresh tree. After a structure is selected, the visibility related details are propagated down the trees based on a particular sequence, as described in a later section. After the user creates the basic structure, the user can now start to edit the tree content.

Edit tree

If a troubleshooting tree exists for the product selected, the tree is displayed to the user. The user can start to edit the content.

The user must explicitly use **Edit tree** to start to make changes. Only one user can edit the content at any one time. After the editing is completed, the user who is modifying can use the **Publish tree** to publish the content when the content would be available to all the users. While creating a tree, the user need not explicitly click **Edit tree** to modify. The content is automatically in the edit mode until the content published.

Some operations while editing the content of a tree include the following:

- Add node
- Delete node
- Modify node
- Copy & paste
- Re-order node

Note that the operations are essentially mouse-based operations.

Add node
A node is an aggregation of repository content, visibilities, relevant FAQs, and hyperlinks. A new node can be added with the repository items being taken from the repository, or dynamically created. Other contents of the node are filled after linking the repository item. Alternatively, predefined templates that contain information can be used.

The user selects the type of repository item they are planning to add under the selected node (parent node). If the user uses the **Get from Repository** button to add the item**,** the user is shown the contents of the repository based on the type selected. The user can add any of displayed types, such as troubleshooting category, question, answer, or action, from the repository.

NOTE At the root level of the tree, only troubleshooting category is allowed below the product. In subsequent levels, either Question, Answer, or Action can be added.

The view pages of each of the repository have built-in search mechanism that help the user to narrow the search to the required items. The user can select directly from this multi-view page or by using the link provided under **Name** to go to the details and select after seeing the total content.

The user can also decide to create the node dynamically. In this case, as the first step, the user must provide a short description and long description in the fields provided.

By default, while creating a node, the visibilities of the parent node get copied to the new node. The user can then edit the visibilities and limit them to what is required in the tree based on the content and audience.

NOTE In a tree, at any given time, the visibilities of the child node are the subset of the visibilities of the parent node.

Hyperlinks can be attached to the current node. These hyperlink enable the user to jump from the current location in the tree to any other location, subject to access to destination node. The **Clear** option removes the hyperlink if any is attached.

FAQs can be attached to the current node as well. After the **Attach FAQs** link is used, the user is taken to a page where the already attached FAQs is listed along with a provision to **Add FAQ to the list.** When you use this link, the user is given some search criteria using which the user receives a list of FAQs that meet the specified criteria. The user can select one or more of the FAQs using the check boxes there and then **Add** the FAQs to the existing list. The user is now taken to the page where the total list of FAQs appears. Whatever FAQs are selected when the user presses the **Submit** button are the FAQs that are linked to the current node.

If the user clicks **Get from Template,** the user is shown the list of available templates. If the user adds the template under a product, templates that have only troubleshooting categories at the top level are shown. If the user adds the template under a level other than product, templates with a collection of Questions, Answers, and Actions are shown. A template can consist of one or more nodes at the top. Therefore, all these nodes are added under the node where these nodes must be added. Each and every node of the template is linked with the repository items, along with the relevant FAQs. The hyperlinks present in the template are disregarded during this operation. The visibilities will undergo a transition as detailed subsequently in this document.

The user can press **Save** when the content they created is added to the node. If the short description and long description were dynamically added, a new repository item of the specified type is created in the repository and then attached to the node. All the other details are automatically saved in the node. The **Reset** button is used empty the content from the current page, which enables the user to create the entire content from scratch.

Delete node
The delete node removes the current node and all the descending nodes, recursively, below that node from the tree structure. Before removing the node the user is asked to confirm the option and, based on the response, the deletion takes place. Note also that this deletion is limited to the structural content only and does not affect the repository.

Modify node
Modification of a node happens at two levels: repository content and other details. If a modification is made on repository level Details, then the user has two options, one of which is to save the changes only in this node. In this case, the modified content is posted to the repository under a new node, which is then linked to the current tree at the same place. This setup ensures that none of the existing tree structures that use the same repository item suffers. The second option, one that is rarely used, is to update the changes across all occurrences of this particular repository item among the entire database. Both the options are provided through **Update** and **Update All,** respectively.

Copy & paste
This functionality aids in reuse of the content within or across trees. After selecting a node, not the root node in case of troubleshooting tree Product, from the source tree, the user can use the copy option to hold the node in the buffer. Next, the user can go to a location in the destination tree where the copied node must be pasted as the child node. The copied part is pasted under the new parent, except on two counts. The visibility and hyperlinks are modified. The hyperlinks are totally removed and the visibility is modified based on the visibility associated with the parent node in the process detailed in the following section:

Re-order node
The troubleshooting tree has various levels and many nodes for each level. The nodes, for each level are sequenced in the chronological order of their addition to the parent node. Later, if the user wants to reorder the node in the same level, the user can select the node and use the arrow keys provided on the sidebar to reorder the node. This reorders the selected node as desired.

Search tree

The search option provided helps the user to search the content of the tree. Various search operations provided include **And**, **Or**, and **Exact Phrase**. The **Or** search returns all the nodes of the tree that have at least one of the keywords. The **And** search returns all the nodes of the tree that have all the keywords. The **Exact phrase** search searches the content of the tree for the string as specified in the **Keywords** field in the same order.

Expand/collapse tree

The **Expand** (+) option enables the user to view entire tree. The **Collapse** (–) option shrinks the entire tree to a single level that hides all the nodes in the tree except the root node.

Print tree

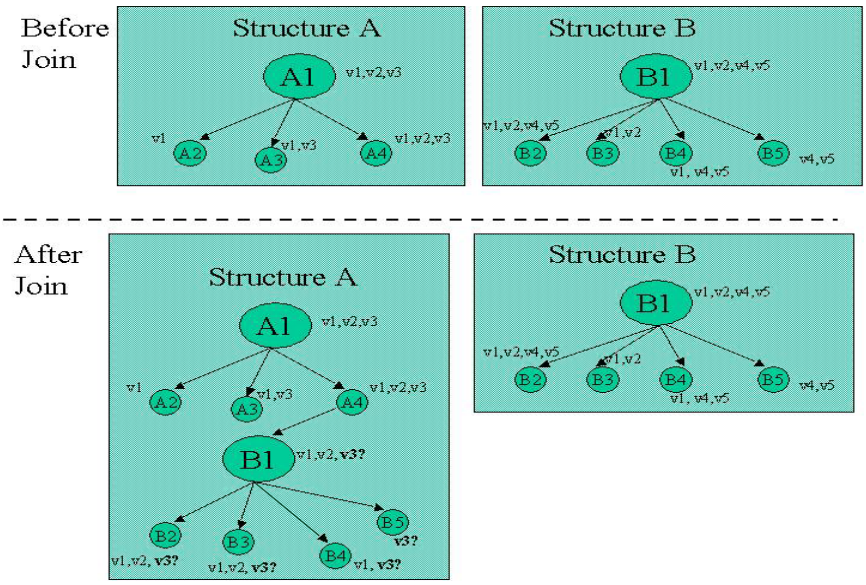
The print option enables the user to print tree with or without the long descriptions. The entire tree is printed in the expanded format.

Delete tree

As a part of edit operation, the user can also click **Delete Tree** to delete the tree. This operation deletes the tree only in two conditions: if nobody is modifying the tree or if the current user modifies the tree.

Visibility modification process

An example helps understand this concept better. Assume you have two structures, A and B. Both these structures have some visibilities associated within each of the nodes. The following schematic represents the situation visibility situation before and after which the node B1 is linked as a child node for A4.



Rules of operation:
Here, structure B is called the source and structure A is called the destination. The copying operation would change the destination structure, but the source would remain intact.

- Rule 1: The visibilities that are common across source and destination structures are carried as they are in the source structure. In this situation, v1 and v2 are common visibilities, therefore, these visibilities are retained.

- Rule 2: The visibilities that belong to source-only are removed. In this situation, visibilities v4 and v5 belong only to the source and are not found in the destination and, therefore, are ignored. The structure would not be deleted but only the visibilities are removed.
- Rule 3: The visibilities that belong to destination-only are prompted for the user to respond on propagation down the tree on the added part. In this situation, the visibility v3 belongs to only the source and not the destination. As a result, the user is prompted of whether or not this must be propagated in the copied structure.

Template maintenance

Template is a basic building block that maintains the most commonly used structural details across trees. A template, like a tree, also is a structural grouping of all repository elements aimed at providing a solution to a problem that a user faces.

The **Create/Edit Template** link, as the name suggests, helps create and define new templates as also modifying the existing links. If you click this link, a list of existing templates appears. The list shows the name, a short description, the associated product category, and the status of the template. If the user clicks any template, the user is taken to a detailed screen that contains two sections: Template details and actual Template structure.

The template details consist of the name, comment, and the associated product category of the template. The **Edit** is used to modify these details. If the user presses this button, a new window that consists the same details appears, which enables the user to make the necessary modifications on name, description, or the associated product category. On completion of the modification, the user must press **Save** to update the content. The **Remove** button deletes the template structure, if existing, and the details associated with the template. The link **Select other Template** takes the user to the same screen as is visible when the link **Create/Edit Template** is operated from the left navigation bar.

Some of the template related operations are the following:

- Create
- Edit
- Search
- Expand/collapse
- Print
- Delete

Create template

The user receives the following options to create a new template:

- **New**:
  To recreate the template. Using this option, the user must create a template from scratch to attach each and every node as the structure is built.
- **From Template**:
  To create the template from another template. Using this option, the user can create a new template from an existing template. After copying the basic form, the user can start to edit the new template.
- **From Troubleshooting Tree**:
  To create the template from another tree. Using this option, the user can create a template from an existing tree. After copying the basic form, the user can then start to edit the template.

To recreate the template
The user can use the items in the repository or dynamically create the items while building the template, simultaneously adding the items to the template and repository. The user can use the copy & paste functionality through which a structure can be copied from an existing structure and paste the structure in the current structure. The copy & paste functionality operates under particular rules and boundaries to be described later. These rules and boundaries are uniform during both creation and editing. The nodes can also be taken from existing templates. In this case, a template consists of a sub-structure of a given tree that is seen as being used in multiple places. The basic process of the template creation is equivalent to editing the template content. All the operations that are a part of this are detailed in that section.

To create a template from a template
A user can create a template from another template. The entire structure, along with the visibilities and associated FAQs for each of the nodes, is also copied. After the user creates the basic structure, the user can now start to edit the template content in the created template.

To create a template from another tree
A tree can be used to create a fresh template. The entire structure, along with the visibilities and associated FAQs for each of the nodes, is also copied. After the user creates the basic structure, the user can now start to edit the template content.

Edit template

The user must explicitly use **Edit Template** to start to make changes. Only one user can edit the content at any given time. After the editing is complete, the user who is modifying can publish template content when the template would be available to all the users. While creating a template, the user need not explicitly click **Edit template** to modify. The template is automatically in edit mode until the template is published.

As a part of the edit operation, the user can also use the **Delete Template** button present there to delete the template. This operation deletes the template only in two conditions: if nobody is modifying the template or if the current user is modifying the template. This will, however, delete only the template structure and not the template details. To remove the template details as well, the user must use the **Remove Template** option in the **Template Details** section on the page.

Some operations while editing the content of a template include the following:

- Add node
- Delete node
- Modify node
- Copy & paste
- Re-order node

Note that the operations are essentially mouse-based operations.

Add node
A node is an aggregation of repository content, visibilities, relevant FAQs, and hyperlinks. A new node can be added with the repository items being taken from repository, or dynamically created. Other contents of the node are filled after linking the repository item. Alternatively, predefined templates that contain information can be used.

The user selects the type of repository item the user is planning to add to the node. When the user uses the **Get from Repository** button to add the repository item**,** the user sees the contents of the repository based on the type selected. The user can add any of displayed types, such as troubleshooting category, question, answer, or action, from the repository.

NOTE If, at the root level of the template, troubleshooting category is allowed for the first times, all the siblings must be of the same type. Similarly, if at the root level any of Question, Answer, or Action is added for the first time, the troubleshooting category cannot be a sibling for this node or can no longer exist in that template.

The view pages of each of the repository have built-in search mechanism that aid to narrow the search to items required. The user can select directly from this multi-view page or by using the link provided under **Name** to go to the details and select after seeing the total content.

The user can also choose to create the node dynamically. In this case, as a first step, the user must specify a short description and long description in the fields provided.

By default, while creating a node, the parent node's visibilities are copied to the child node that is being created. The user can then edit the visibilities and limit them to what is required in the tree, based on the content and audience.

NOTE In a template, at any given moment, the visibilities of the child node are the subset of the visibilities of the parent node. When adding the node to the top level for a template, the user is free to add whatever visibilities they want to associate the node. Subsequently, the total visibilities of the template are UNION of all the visibilities of the template's top-level node.

FAQs can also be attached to the current node. After the **Attach FAQs** link is used, the user is taken to a page that lists the already attached FAQs along with a provision to **Add FAQ to the List**. On using this link, the user is given some search criteria, using which the user receives a list of the FAQs that meet the criteria given. The user can select one or more of the FAQs using the check boxes there and then **Add** the FAQs to the existing list. The user is now taken to the page where the total list of FAQs appears. Whatever FAQs are selected at the time of pressing the **Submit** button are the FAQs that are linked to the current node.

When the user adds using button **Get from Template,** the user is shown the list of available templates. If the user adds the template at the top level, a sibling-type check is made and, if any of the siblings has only troubleshooting categories, then only templates that have the troubleshooting category at the top-level are shown. Similarly, sibling-type-check yields a different type then all the templates that do not have troubleshooting category at the top-level are displayed. A template can consist one or more nodes at the top. As a result, all these nodes are added under the node where these nodes must be added. Each and every node of the template is linked with the repository items along with relevant FAQs. The hyperlinks present in the template are disregarded during this operation. The visibilities will undergo a transition as detailed subsequently in this document.

The user can press **Save** when the content they created is added to the node. If the short description and long description were dynamically added, a new repository item of the specified type is created in the repository and then attached to the node. All the other details are automatically saved in the node. The **Reset** button is used to empty the content from the current page, which enables the user to create the entire content from scratch.

Delete node
The Delete node removes the current node and the child nodes below the node that is being deleted from the template. Before removing the node, the user is asked to confirm and, based on the response, the deletion take place.

Modify node
Modification of a node happens at two levels: repository content and other details. If a modification is made on repository level details, then the user has two options: one to save the changes only in this node. In this case, the modified content is posted to the repository under a new ID. This ensures that none of the existing tree structures that use the same repository item suffers. The second option, which is rarely used, is to update the changes across all occurrences of this particular repository item among the entire database. Both the options are provided through **Update** and **Update All**, respectively.

Copy & paste
This functionality aids in reuse of the content within or across trees. After selecting a node (not the root node) from the source structure, the user can use the copy option to hold the node in the buffer. The user can then go to the location in the destination structure where the copied node must be pasted as a child node. The copied part is pasted as is under the new parent, except on two details. The visibility and hyperlinks are modified. The hyperlinks are totally removed and the visibility is modified based on the visibility associated with the parent node, in the process detailed later in this section.

Re-order node
The template has various levels and multiple nodes for each level. The nodes for each level are sequenced in the chronological order of their addition to the parent node. Later, if the user wants to reorder the node in the same level, to do so, the user can select the node and use the arrow keys provided on the sidebar for the purpose. This will reorder the selected node as desired.

Search template

The search option provided helps the user to search the content of the template. Various search operations provided include **And**, **Or**, and **Exact Phrase**. The **Or** search returns all the nodes of the template that have at least one of the keywords. The **And** search returns all the nodes of the template that have all the keywords. The **Exact phrase** search searches the content for the string as specified in the **Keywords** field in the same order.

Expand/collapse template

The **Expand** (+) option enables the user to view entire template. The **Collapse** (-) option shrinks the entire tree to a single level and hide all the nodes in the template except the root node.

Print template

The print option enables the user to print template with or without the long descriptions. The entire template is printed in the expanded format.

Delete template

As a part of edit operation, the user can click **Delete Template** to also delete a template. This operation deletes the template only in two conditions: if nobody is modifying the tree or if the current user is modifying the tree.

Visibility modification process

This process is quite similar to the process for a tree. For more information, refer to “Visibilities,” previously in this chapter.

6 iBaan E-Service 2.1 Admin Utility

The E-Service application also has an Application Interface- Admin Utility, which you can find on **Start → Program → iBaan E-Enterprise → iBaan E-Service2.1 Admin Utility**. If you follow the normal default installation steps, the utility is physically present and, assuming that the installation is performed on the C drive, you can find this utility in the C:\Program Files\Baan\iBaan E-Enterprise Server\Components\E-Service along with the other NT Services in the same folder.

The primary function of this admin utility is to enable the user to manually invoke the NT Services that are in disabled or manual mode. All the NT Services that are present in the E-Service application can be manually invoked from this interface if the administrator chooses to.

A log file is created and placed in the following folder:

```
C:\Program Files\Baan\iBaan E-Enterprise Server\BESvcLog.
```

Using E-Service in stand-alone mode, the **Synchronization-Related** button is disabled. Any of the NT Services can be invoked manually from this interface and this feature for each of the services is enabled only when the NT Service is disabled or is in manual mode, that is, OFF state in E-Service database.

7 Integration with iBaan ERP 5.0c

iBaan E-Service 2.1 is integrated with the CLM module in the iBaan ERP 5.0c Service package. To enable the integrations, you must set the following parameters. The details about the setting up of master data are described in Chapter 8, “Master data setup iBaan ERP 5.0c.” The prerequisite is the installation of iPack 3.0 for iBaan ERP 5.0c – E-Service 2.1.

E-Common setup and maintenance

Business partners

Business partners

If you click this button, the **Business Partners** displays all the business partners that are maintained in the E-Enterprise application. The **Add Business Partner** option is used to input a **Business Partner** and associate the same with a **BIS Customer.** The **BIS Customer** field is equivalent to the sold-to business partner that is maintained in the iBaan ERP application.

User management

Employee

The **Employees**, when clicked, displays all the employees. The **Add Employee** option is used to input an **Employee ID** that is equal to the way that is defined in the iBaan ERP application. The **Name** is the value that is seen in the E-Enterprise application.

Users

The E-Service user can be associated with an **Employee ID**. If E-Service is integrated with iBaan ERP, the **Employee ID** for internal users must be filled with the employee code as used in iBaan ERP for the user. The employee code is used to assign a call to a user in iBaan ERP.

Apart from other vital information as specified in the EES Administrator's Guide, the user can be linked to a **Business Partner**. When E-Service is integrated with iBaan ERP, the E-Service business partner is associated with a BIS customer as specified in the iBaan ERP. This link is used when a service request is created and when service calls are viewed through E-Service.

E-Dashboard setup and maintenance

The E-Dashboard functions must be used to set up the integration between iBaan E-Enterprise and the Business Information System (iBaan ERP). To access the **E-Dashboard Maintenance** functions, click **E-Manager → E-Dashboard**.

In E-Dashboard, the following, E-Service uses the following set of parameters:

- Business Information System (BIS).
- BIS Selection.

For details on how to set up BIS, refer to the *E-Enterprise Server Administrator's Guide*. The user must use **Set Default BIS Instance.** This setting is used primarily during the master data synchronization.

BIS Selection

Before maintaining the BIS Selection Rule Instances, make sure that a BIS Selection Rule name **Business Partner** exists with a field name **BPID** of type STRING. If E-Service is integrated with multiple ERP servers, you can select the appropriate iBaan ERP server based on a **BIS Selection Rule**.

E-Service supports BIS Selection, based on the business partner that is linked to the user. To use this BIS Selection rule, you must define a BIS Selection Rule Instance for each business partner. In the BIS Selection rule, the business partner must be linked to a BIS Instance. To define a BIS Selection Rule, take the following steps:

1. Add **BIS Selection Rule Instance**: Specify the BIS Instance and the type of BIS Selection Rule business partner.
2. Click the **BIS Selection Rule Instance** created in the previous step. Click **BIS Selection Rule Instance Field Values**, click the field name **BPID** and specify the **Field Value, and** specify the business partner as maintained in Business Partners table in E-Common.

If a user creates a service request in E-Service, the business partner identification as registered in the user data will be used to select the iBaan ERP server in which the service call must be registered.

E-Service setup and maintenance

The user defaults, service center defaults and call parameters must be appropriately set for the default call group and series at the back end.

The login with which the BIS Instances are started is used to figure out the number group and number series to be used to create the calls so thee calls must be maintained for the login that starts the components. Generally, the calls in a site are created by a few individuals irrespective of who creates the calls. What is important is that these individuals must be assigned to the appropriate support engineer (SCE). To do so, the number group and series cannot be meddled.

Service parameters

Back-end parameters

When E-Service is integrated with iBaan ERP 5.0c, the following parameters must be set:

All Guest Users Privileged accepts a Boolean and is **True** when the company extends the privileges for the Privileged user role for a guest user.

All Registered Users Privileged accepts a Boolean and is **True** when the company extends the privileges of a privileged user to all the registered users.

Call Creator is the person on whose name the calls are created in the iBaan ERP Call management. This login is used when the call center engineer transfers the service request in the call center to the support center and are automatically dispatched.

The **Call Group For Complaint** stores the default back-end code for call group complaint to create a call in CLM.

The **Call Group For Malfunction** stores the default back-end code for call group complaint to create a call in CLM.

The **Call Group For Question** stores the default back-end code for call group complaint to create a call in CLM.

The **Company Level Direct Call Creation** decides how the users of a E-Service create service requests based on the **Routing** option.

The **ERP Activity** is the default back-end code of the activity taken.

The **ERP Problem** is the default back-end code of the established problem.

The **ERP Solution** is the default back-end code of the established solution.

The **Last Synchronized Date** store the date when the master data was last synchronized from ERP. This time is synchronized with the ERP system's time.

The **Return Link Path** stores the web site URL. This assists the user in the call session of ERP to directly click the link and access the Web site.

The **Routing Option** parameter provides a choice to the registered user at application level to register the service request directly to the call center, support center, or based on the user's choice.

The **Routing Option Guest** parameter provides a choice to a guest user at application level to register a service request directly to the call center, support center, or based on user's choice.

Mail manager

In the **Mail Manager**, the user can define the various types of e-mail messages. These e-mail formats are dispatched during various situations based on some events. The integration with iBaan ERP 5.0c requires types of e-mails, as listed in Appendix A, "Mail types." These mail types come with the standard installation.

Dispatch rules for SCE

Weights for support center engineer

The dispatching functionality can automatically assign the service requests to a support engineer based on a number of criteria. These criteria can be set in the **Dispatching Weight** when any of the following weights is clicked:

For each support center engineer, you can specify the following criteria:

- Business Partner
- Country
- Keywords
- Language
- Product Category
- Question Category

Regional setting

Initially, all the values here are set to zero. The values can be set with any integer value in the range 0-1000. After the values have a non-zero value, no two criteria can have the same value.

Rules for support center engineer

Each of the dispatching rules is in the name of a support center engineer. For every support center engineer, the status dispatching weights, along with the queue size and the experience for a given support center engineer, determine the way a particular service request is assigned.

Add New Dispatching Service is used to create a new dispatch rule for a particular support center engineer. If the user clinks that link, the user is taken to the New Dispatching Task page where, for a given support center engineer, the dispatching criteria can be assigned.

The **Status** can be set to **On** or **Off**. If set to **On**, the automatic dispatching considers the particular rule for assigning the support center engineer to a service request that is registered.

The **Engineer** field lists the entire internal users that have the Support Engineer role. Any engineer who already has one rule will not be listed in the list box. For a given support center engineer, only one rule can exist.

NOTE The administrator must manually ensure that the engineers listed here are the ones who have SCE rule. If a user, who previously had the support center engineer role, has that privilege removed in their user profile, the administrator must delete the relevant user record manually.

NOTE You must have at least one rule defined if automatic dispatching must be enabled.

The **Product Category**, **Question Category**, **Business Partner**, **Countries**, **Languages**, and **Regional Settings** have the select option using which one or more of the options listed can be selected against the criteria.

The **Keywords** field is a text field in which some keywords are listed and these too can be specified as the criteria.

For automatic dispatching, when a service request is created, all dispatch rules in the **On** status is taken and each of the criteria are evaluated for a match against each of the support center engineers. Wherever match points are added for each engineer. In the final tally, the support center engineer with more points would be assigned the service request. In case of a tie, the queue size of the support center engineer is who have the same score are compared and the service request is assigned to the support center engineer that has the least number of service requests against. In case of tie at this level, the support center engineer with the most experience is considered and the service request is also dispatched. In case of a deadlock, the service request is assigned randomly to among the support center engineer that have same scores on all counts.

In case of manual dispatching, the steps are followed in the same sequence except that all the support center engineers are considered to assign the service request, irrespective of their status or dispatching criteria and final ordered list is evolved in line with the previous set of criteria.

8 Master data setup iBaan ERP 5.0c

The master data setup for iBaan ERP 5.0c for E-Service 2.1 involves two steps. The first step is importing the master data through Exchange/DTS scheme. The second step involves periodic synchronization of this master data.

Import master data

Exchange schemes and DTSs are used in conjunction to transfer data from iBaan ERP to iBaan E-Service. The process to transfer data consists of the following steps:

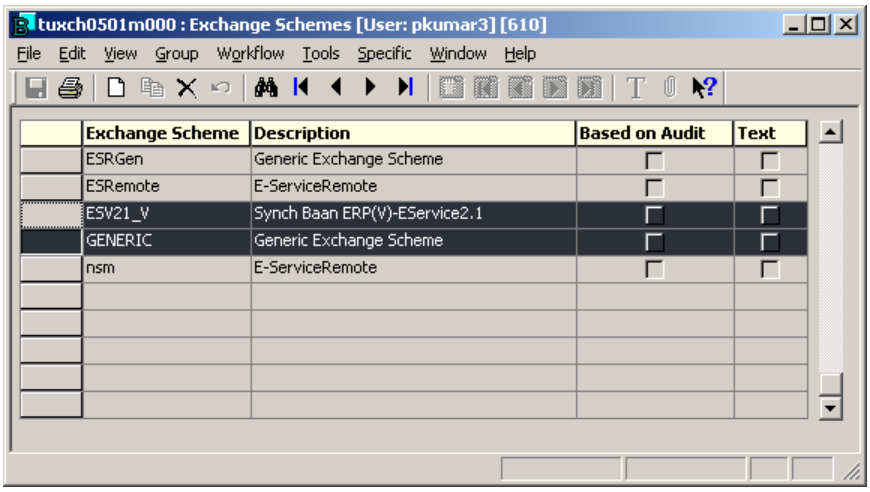
1. Run the Exchange Scheme ‘ESV21_V’ to export the data.
2. Copy the data files from the iBaan ERP system to the E-Service database server.
3. Run each DTS package to import the data on the E-Service database server.

The following section describes each of these steps in detail.

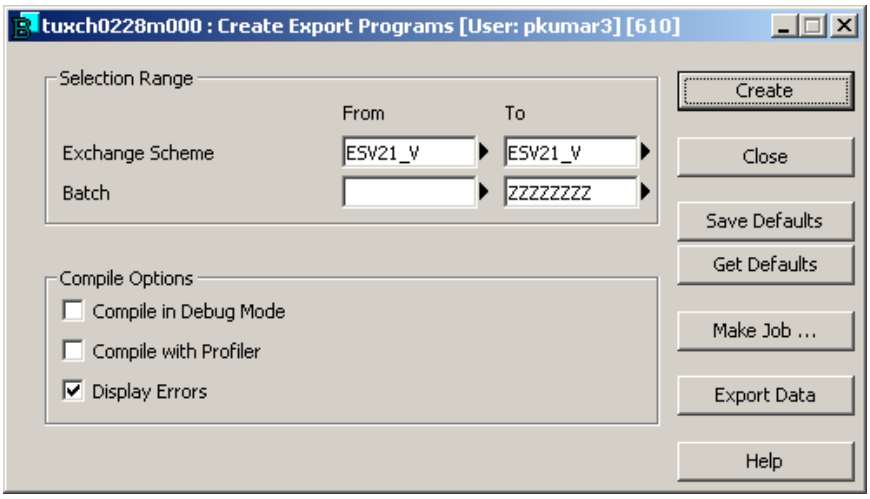
Run the Exchange scheme

1. Start the iBaan ERP Menu Browser.

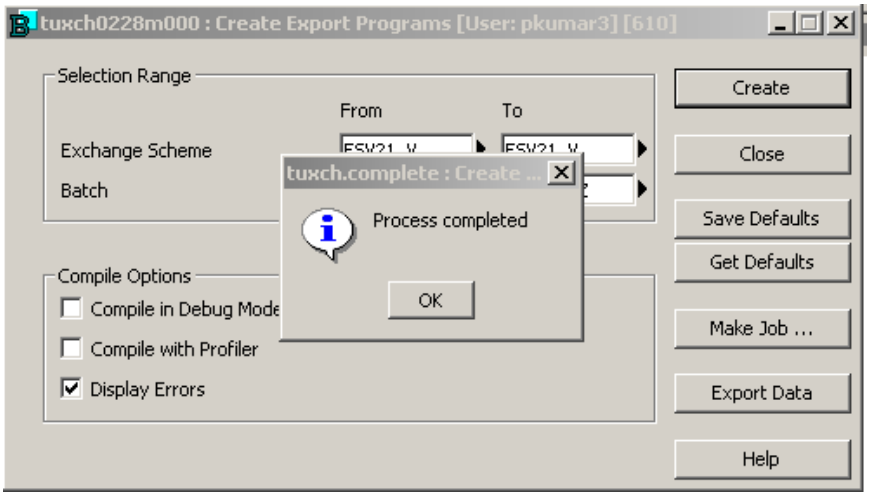
2 Ensure that the following **Generic** and **ESV21_V** exchange schemes are available with the system in **Baan Exchange → Master Data → Exchange Schemes** to open the Exchange Schemes (tuxch0501m000) session, as shown in the following figure:



3 Double-click **BAAN Exchange → Export Module → Create Export Programs** on the iBaan ERP Menu Browser. The Create Export Programs (tuxch0228m000) session starts, as shown in the following figure:

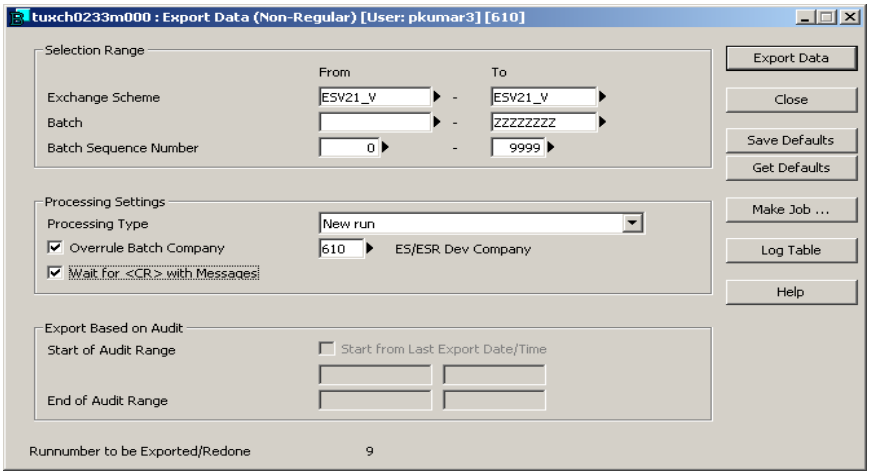


4 In the **Exchange Scheme** list, enter **ESV21_V** in the **To** and **From** of the **Exchange Scheme** field. The batch field takes the all the batches, TSMCS070, TSCFG200, TSCFG220, and TSCLM330. Click **Create**. When the process is complete, the "Process Completed" message appears. Click **OK**. For subsequent runs, this step is not required:

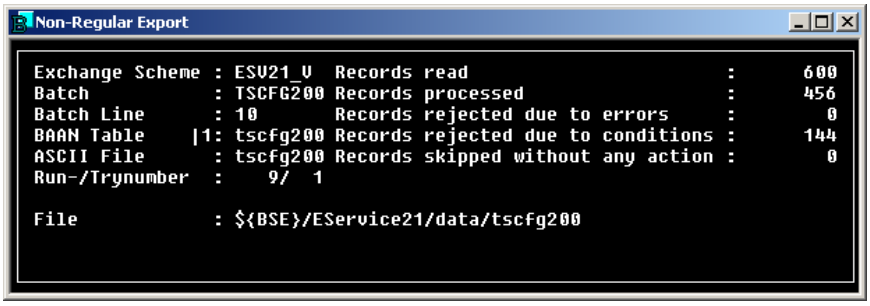


5 Double-click **BAAN Exchange → Export Module → Export Data (Non-Regular)** on the iBaan ERP Menu Browser. The Export Data (Non-Regular) (tuxch0233m000) session starts.

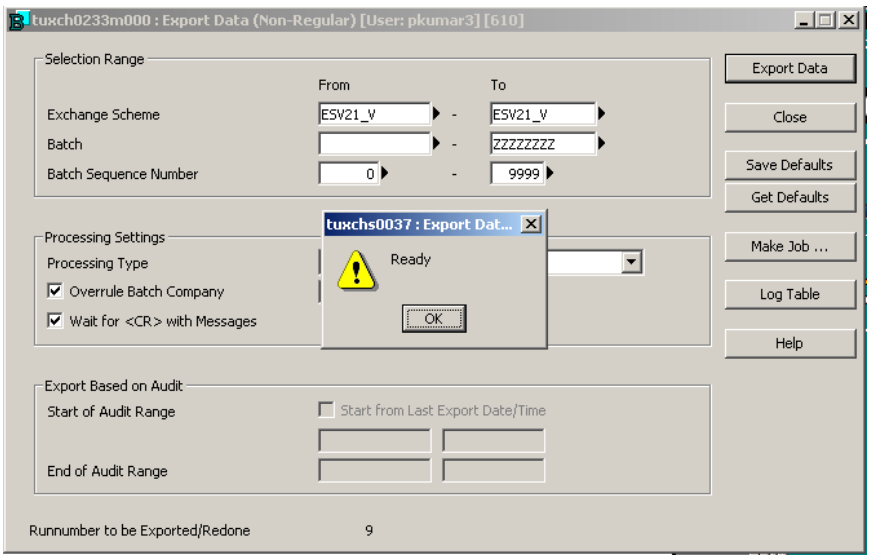
6 Select **ESV21_V - Exchange Scheme** and run for all **Batch**, **Batch Sequence Numbers**. Select **Overrule Batch Company** and specify the appropriate company from which the data must be exported. Press **Export Data**.



If you click **Log Table,** a windows such as the following appears momentarily:



7 When the "Ready" message appears, click **OK** and then click **Close:**



8 Click **Close** in the next window.

The data is stored in the following directory: ${BSE}\EService21\Data.

You can use any text editor to view these files to verify whether the data was exported correctly.

If the data of a particular company is exported more than once, the existing files in the ${BSE}\EService21\Data directory will be overwritten.

To copy the data files

Copy all the files in the directory ${BSE}\Eservice21\Data in iBaan ERP to the directory C:\Ee_xchEService5c\EService on the E-Service database server.

NOTE Delete any existing files in the directory C:\Ee_xchEService5c\EService. Otherwise, move the files to a different location.

If iBaan ERP runs on an a Windows NT or Windows 2000 machine that is connected to the LAN, you can use a simple file copy, using Windows Explorer or a batch file, to copy the files to the E-Service database machine. If iBaan ERP runs on a UNIX machine, FTP must be performed in binary format to transfer the files from the iBaan ERP System to the E-Service database machine.

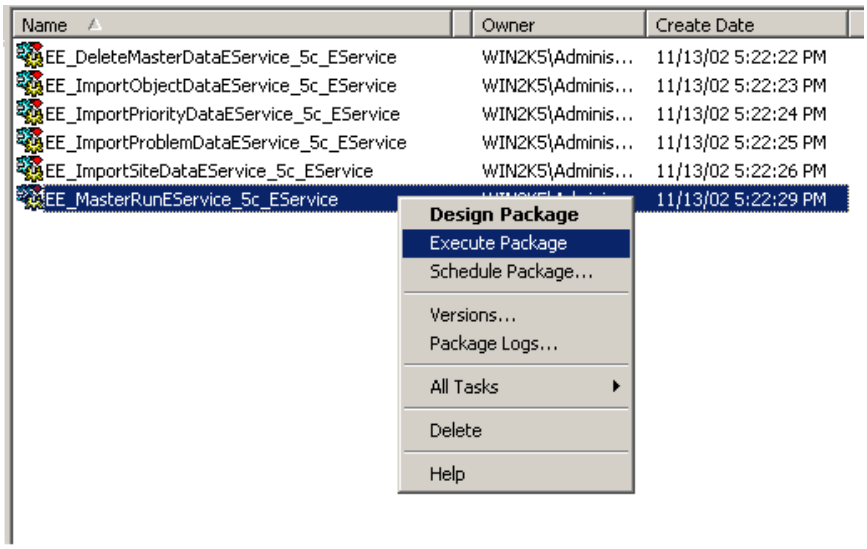
To run the E-Service DTS packages

E-Service DTS packages use LineFeed (LF) as a row delimiter for records. If the iBaan ERP application is installed on a UNIX operating system, the text files created by the exchange scheme can contain a different row delimiter, for example, ControlCharacter and LineFeed. Therefore, before you execute the DTS packages, check the row delimiter in the text files and appropriately modify the DTS packages. TAB, CTRL+I, or pipe is also used as a column delimiter. You only must ensure that this rule is consistently observed to avoid any mismatch.

The following packages are the DTS packages that must be present in the DataTransformationSchemes>Local Packages:

- EE_DeleteMasterDataEService_5c_EService
- EE_ImportObjectDataEService_5c_EService
- EE_ImportPriorityDataEService_5c_EService
- EE_ImportProblemDataEService_5c_EService
- EE_ImportSiteDataEService_5c_EService
- EEMasterRunEService_5c_EService

When the packages are found and the text files from Exchange are loaded at the right location, Execute Package with the name EE_MasterRunEService_5c_Eservice:



Synchronize master data

The application interface available on the Web server, iBaan E-Service 2.1 Admin Utility, has an option to maintain and monitor the master data in case of iBaan ERP 5.0c integrations. The audit trail must be enabled in ERP on the tables that require data synchronization.

9 Integration with Baan IVc4

iBaan E-Service 2.1 can be integrated with the SMA module Service Package of Baan IVc4 as the back-end application. To enable the integrations, you must set the following parameters. The details about the setting up of master data are described in Chapter 10, “Master data setup Baan IVc4.” The prerequisite is the installation of iPack 1.0 for Baan IVc4 – E-Service 2.1.

E-Common setup and maintenance

Business partners

Business partners

The **Business Partners**, when clicked, displays all the business partners as maintained in E-Enterprise application. The **Add Business Partner** option is used to input a **Business Partners** and associate the same with a **BIS Customer.** The **BIS Customer** field is equivalent to the business partner as maintained in the Baan IVc4 application.

User management

Employee

The **Employees**, when clicked, displays all the employees. The **Add Employee** option is used to input an **Employee ID** that is equal to the way as defined in Baan IVc4 application. The **Name** is the value as seen in the E-Enterprise application.

Users

The E-Service user can be associated with an **Employee ID**. When E-Service is integrated with Baan IVc4, the **Employee ID** for internal users must be filled with the employee code as used in Baan IVc4 for the user. The employee code is used to assign a call to a user in Baan IVc4.

Apart from other vital information as specified in the *EES Administrator's Guide*, the user can be linked to a business partner. If E-Service is integrated with Baan IVc4, the E-Service business partner is associated with a BIS customer as specified in Baan IVc4, which is used when a service request is created and when service orders are viewed through E-Service.

E-Dashboard setup and maintenance

The user must use the E-Dashboard functions to set up the integration between iBaan E-Enterprise and the Business Information System. To access the **E-Dashboard Maintenance** functions, click **E-Manager→ E-Dashboard**. You must set up the following processes in the sequence in which the processes are listed:

In E-Dashboard, E-Service uses the following set of parameters:

- Business Information System (BIS)
- BIS Selection

For details on how to set up BIS, refer to the *E-Enterprise Server Administrator's Guide*. You must set the **Default BIS Instance**, which is used primarily during the master data synchronization.

BIS selection

Before you maintain the BIS Selection Rule Instances, make sure that a BIS Selection Rule name **Business Partner** exists with a field name **BPID** of type **STRING**. If E-Service is integrated with multiple ERP servers, the appropriate iBaan ERP server can be selected based on a **BIS Selection rule**.

E-Service supports BIS selection based on the business partner that is linked to the user. To use this BIS selection rule, a BIS selection rule instance must be defined for each business partner. In the BIS selection rule, the business partner must be linked to a BIS instance. To define a BIS selection rule, take the following steps:

1 Add **BIS Selection Rule instance**: Specify the BIS instance and the type of BIS selection rule **Business Partner**.

2 Click the **BIS Selection Rule Instance** created in the previous step. Click **BIS Selection Rule Instance Field Values**, click the field name **BPID**, and specify the **Field Value.** Specify also the business partner as maintained in the Business Partners table in E-Common.

If a user creates a service request in E-Service, the business partner identification as registered in the user data will be used to select the iBaan ERP server in which the service call must be registered.

E-Service setup and maintenance

Service parameters

Back-end parameters

If E-Service is integrated with Baan IVc4, the following parameters must be set:

The **Last Synchronized Date** stores the date when the master data was last synchronized from Baan back-office application. This time is synchronized with the ERP system's time.

The **Order Type** stores the information of the type of order that is to be created when the service request is transferred to the Baan back end.

The **Series Number** data is used to in the creation of the service orders in the SMA in Baan IVc4.

The **Service Area** holds the default location that is required to create a service order in SMA when the service request is transferred to the back end.

The **SPF Module Implemented** accepts a Boolean parameter Yes/No. This must be in sync with the value stored in the back-end application. If the value is **Yes** then the service request must have a problem as a mandatory field when the value is transferred to the back end and a service order is created in SMA.

Mail Manager

In the **Mail Manager,** the various types of mails can be defined. These mails are the mail formats that are dispatched during various situations based on some events. The integration with Baan IVc4 requires the following types of e-mail messages as listed in Appendix A, "Mail types." The e-mail message comes with the standard installation.

10 Master data setup Baan IVc4

The master data setup for Baan IVc4 for E-Service 2.1 involves two steps. The first is to import the master data through Exchange/DTS scheme. The second step involves periodic synchronization of this master data.

Import master data

Exchange schemes and DTS are used in conjunction to transfer data from Baan IVc4 to iBaan E-Service. The process to transfer data consists of the following steps:

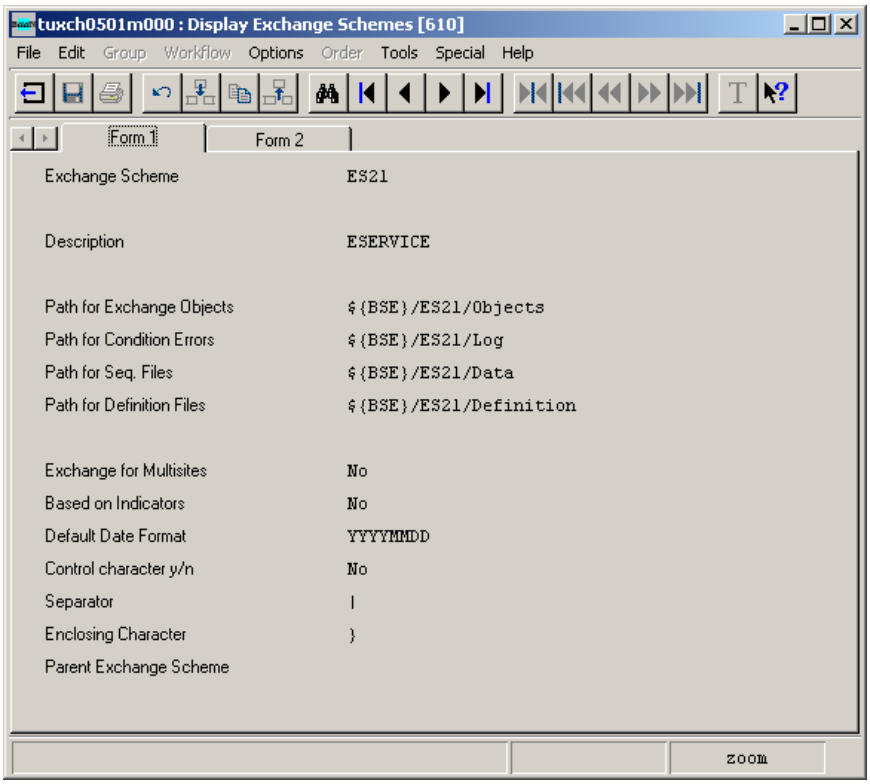
1. Run the Exchange Scheme ES21 to export the data.
2. Copy the data files from the Baan IVc4 system to the E-Service database server.
3. Run each DTS package on the E-Service database server to import the data.

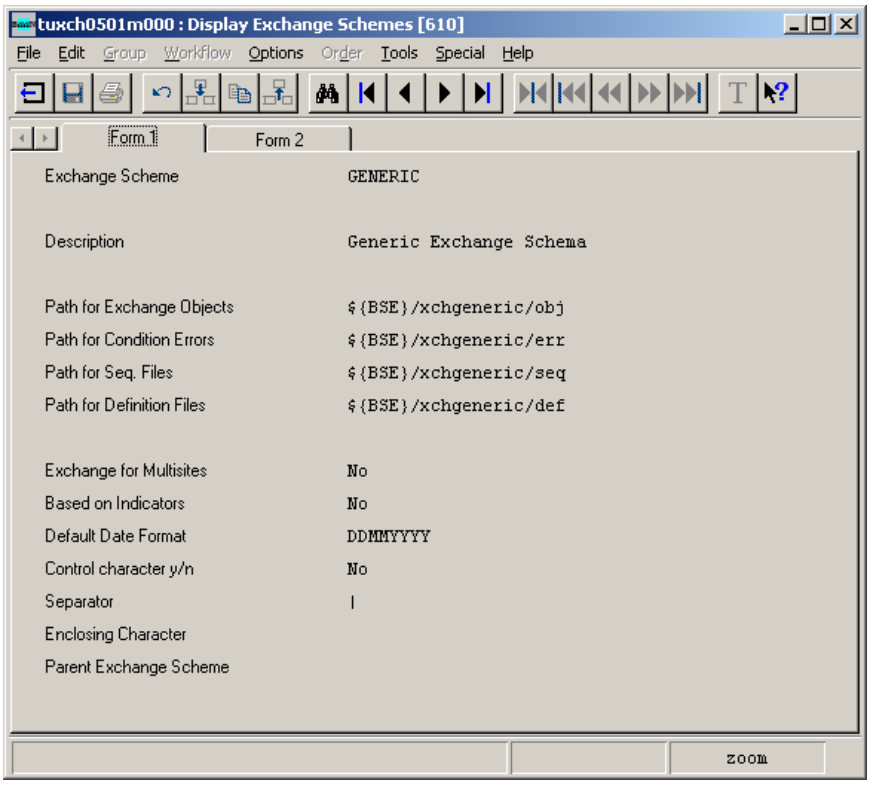
The following sections describe each of these steps in detail.

Run the Exchange scheme

1. Start the Baan IVc4 Menu Browser.

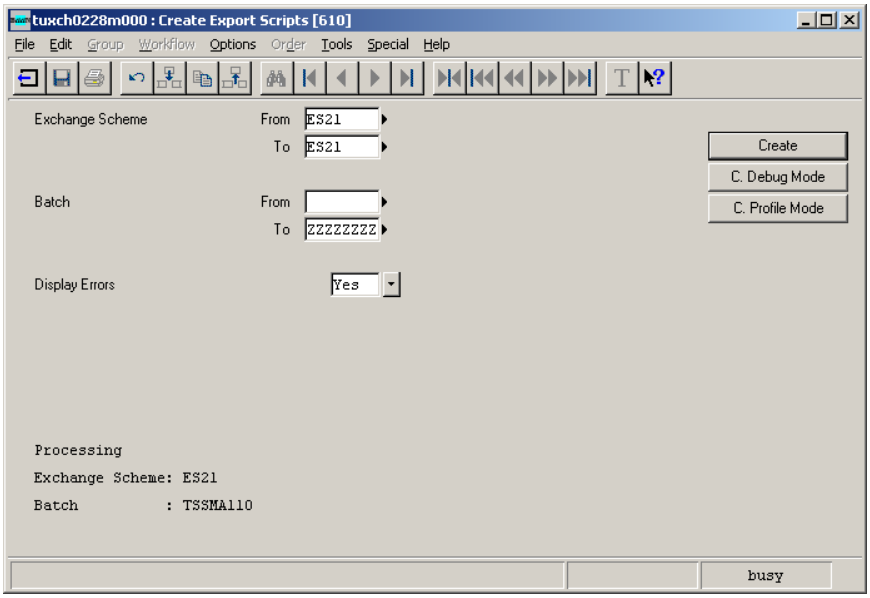
2 Ensure the following **Generic** and **ES21** exchange schemes are available with the system in **Baan IV Utilities → Master Data → Inquire → Display Exchange Schemes.** This session is the Display Exchange Schemes (tuxch0501m000) session:

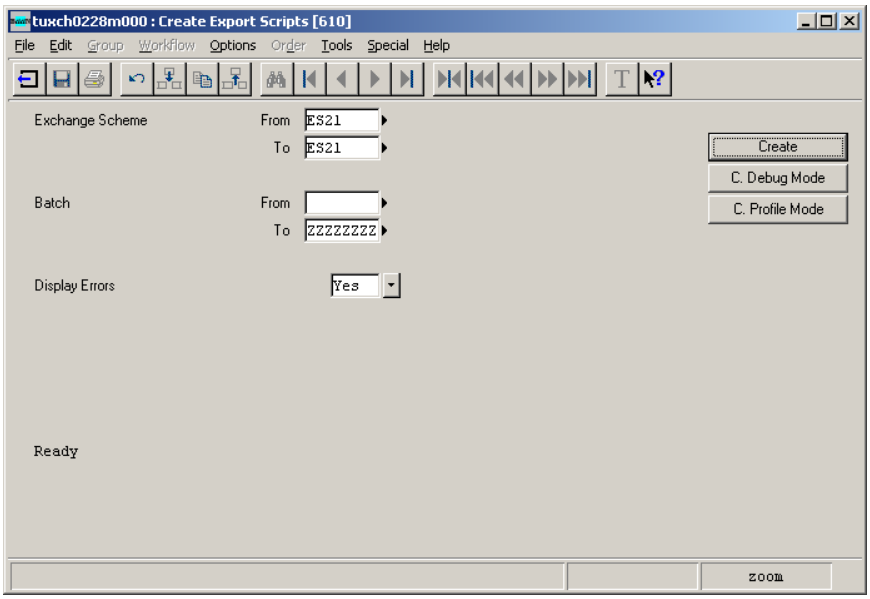




3 Double-click **Baan IV Utilities → Export Module → Maintain → Create Export Scripts** on the iBaan ERP Menu Browser. The Create Export Programs (tuxch0228m000) session starts.

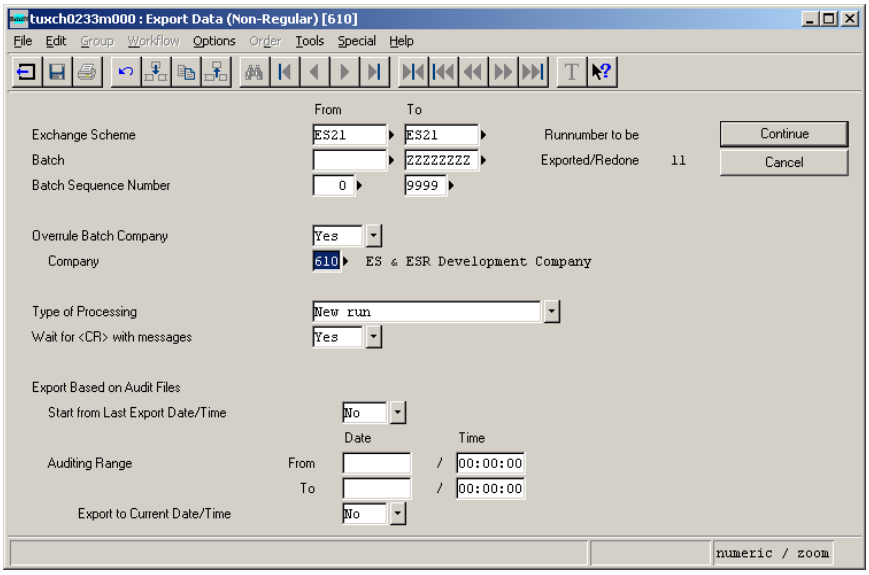
4 Enter **ES21** In the **Exchange Scheme** list in the **To** and **From** fields. The batch field takes the all the batches, TSSMA102, TSSMA110, TSSMA304, TSSPF101, and TSSPF102. Click **Create**. In the same screen towards the bottom, you see **Processing** and the session creates export scripts for the previous batches. When the process is completed, the “Ready” message appears. You can now close the window.





5 Double-click **Baan IV Utilities → Export Module → Maintain → Export Data (Non-Regular)** on the Baan IV Menu Browser. The Export Data (Non-Regular) (tuxch0233m000) session starts.

6 Select **ES21 - Exchange Scheme** and run for all **Batch**, **Batch Sequence Numbers**. Select **Overrule Batch Company** and specify the appropriate company from which the data must be exported. Press **Continue**:



7 When the process is completed successfully, the “Ready” message appears, click **OK** and then click **Close** to close the message window.

8 Close the Export Data (Non-Regular) (tuxch0233m000) session.

The data is stored in the following directory: ${BSE}\ES21\Data.

You can use any text editor to view these files to verify whether the data was exported correctly.

If data of a particular company is exported more than once, the existing files in the ${BSE}\ES21\Data directory will be overwritten.

To copy the data files

Copy all the files in the directory ${BSE}\ES21\Data in iBaan ERP to the directory C:\Ee_xchEService4c\EService on the E-Service database server.

NOTE For the first time create the sub-folder EService under the path C:\Ee_xchEService4c. Delete any existing files in the C:\Ee_xchEService4c\EService directory. Otherwise, move the files to a different location.

If Baan IVc4 runs on a Windows NT or on a Windows 2000 machine that is connected to the LAN, you can use a simple file copy using Windows Explorer or a batch file to copy the files to the E-Service database machine. If Baan IVc4 runs on a UNIX machine, FTP must be performed in binary format to transfer the files from the Baan IVc4 system to the E-Service database machine.

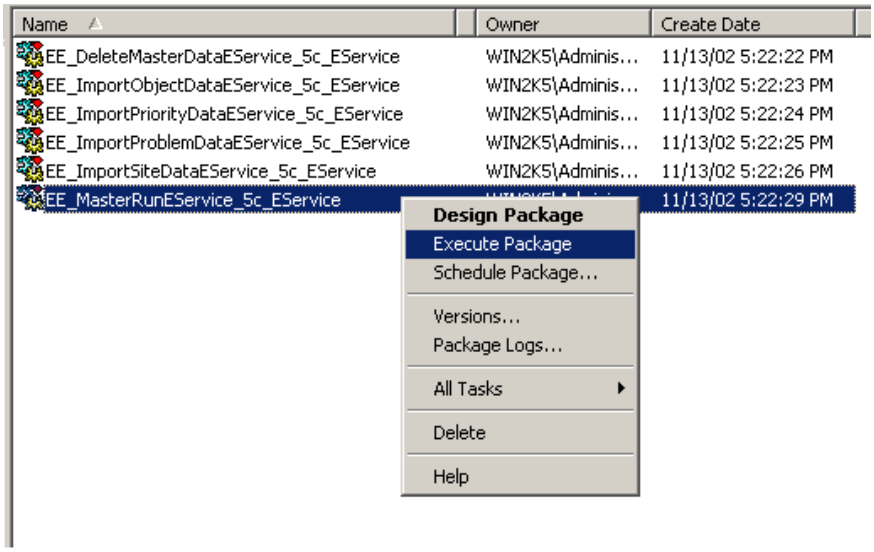
To run the E-Service DTS packages

E-Service DTS packages use LineFeed (LF) as a row delimiter for records. If the iBaan ERP application is installed on a UNIX operating system, the text files created by an exchange scheme can contain a different row delimiter, for example, ControlCharacter and LineFeed. Therefore, before you run the DTS packages, check the row delimiter in the text files and appropriately modify the DTS packages. TAB, CTRL I, or pipe is also used as a column delimiter. You must simply ensure that this rule is consistently observed so that no mismatch occurs.

The following are the DTS packages that must be present in the DataTransformationSchemes>Local Packages:

- EE_DeleteMasterDataEService_4c_EService
- EE_ImportPriorityDataEService_4c_EService
- EE_ImportProblemDataEService_4c_EService
- EE_ImportProductDataEService_4c_EService
- EE_ImportSiteDataEService_4c_EService
- EE_ImportSymptomDataEService_4c_EService
- EEMasterRunEService_4c_EService

After the packages are found and the text files from exchange are loaded at the right place, **Execute Package** with the name **EE_MasterRunEService_4c_EService**.



Synchronize master data

The application interface available on the Web server, iBaan E-Service 2.1 Admin Utility, has an option to maintain/monitor the master data in case iBaan ERP IVc4 integrations. The audit trail must be enabled in Baan IVc4 on the tables that require data synchronization.

Appendix A Mail types

This Appendix lists the various mail types that are used in the application. These include those mail types are in stand-alone as well as integrated mode.

A.1 E-Service mail types

ID	Description	Sent to	Summary
1	Creation Acknowledgment	Customer	Sent to the user who creates a service request as soon as the request is successfully submitted. Generally, the user is an external user, but can also be an internal user called 'customer'.
2	Engineer Assignment (CC)	CCE	Sent to the CCE/SCE when a service request is assigned to them.
3	Update Acknowledgment	Customer	Sent to the customer when they supplement the service request they created, further.
4	Reopened	CCE/SCE	Sent to the CCE/SCE who last provided a solution for a given service request; which when the customer reopens the service request.
5	Closed (Customer)	Customer	Sent to the customer to indicate that they accepted the solution provided for the service request they raised previously.
6	Solution Provided	Customer	Sent to the customer that raised the service request as soon as the solution is made available.

8	Reminder for a Response	Customer	Sent to a customer who does not respond to the solution provided, after a predefined amount of time has elapsed after the solution is provided.
9	Closed by CCE/SCE	Customer	Sent to the customer as soon as the CCE/SCE closes the service request on behalf of the customer with their consent.
10	Closed (Automatic)	Customer	Sent to the customer after NT Service concludes the service request for which no response was received from the customer. This service request has a reminder e-mail message sent previously.
11	Closed by CCE/SCE (Forced)	Customer	Sent to the customer when a CCE/SCE forcibly concludes the service request from a customer. In this situation **Accepted by Customer** is set to **No**.
12	PIN Number	Prospect	E-mail message used to send a randomly generated number that would act as their identification when used along with the e-mail address, to the prospect or the guest user who registers the service request.
13	Clarification Requested	Customer	Sent to the customer when a clarification is sought by the CCE/SCE.
14	Clarified	CCE/SCE	Sent to the CCE/SCE when the customer clarifies.
15	Cancelled Internally	Customer	Sent to customer when the service provider cancels the service request from the customer.
16	Cancellation Acknowledgment	Customer	Sent to the customer when the customer himself has canceled the service request from the customer.
17	Engineer Assignment (SC)	SCE	Sent to the engineer when a call is assigned to the support center.

18	Transfer & Put Onhold	Customer	Sent to the customer when the service request raised by the customer is put on hold when attempting to transfer the service request to the field service.
19	On Hold Removal	Customer	Sent to the customer when the service request that is the field service is ready to be processed after being on hold.
20	Transferred to Field Service	Customer	Sent to the customer when the service request is transferred from the call center to field service.
21	Transferred & Put Onhold	CCE	Sent to the CCE that the service request of the customer has been put on hold.
22	On Hold Removal	CCE	Sent to the CCE when the on hold status of the service request in the field service is removed.
23	Cancelled by Supervisor	CCE	Sent to the CCE when the service request in the field service has been cancelled by the supervisor
25	Draft (Engineer)	CCE	Sent to the CCE when the service request of the customer is put in draft status.
26	Draft (Customer)	Customer	Sent to the customer when the service request is put in draft when being transferred to the field service.
27	Draft Removal (Engineer)	CCE	Sent to the CCE when the draft status of the service request has been revoked.
28	Draft Removal (Customer)	Customer	Sent to the customer when the draft status of the service request has been revoked.
29	Dispatcher Escalation	Dispatcher & Supervisor	Sent to Dispatcher with a copy to supervisor when the registered service request escalate
30	Engineer Escalation	Engineer	Sent to individual Engineer when the assigned service request escalate

31	Supervisor Escalation	Supervisor	Sent a copy of the entire list of escalated Assigned service requests for each engineer
32	Direct Call Creation Failed	Dispatcher & Supervisor	Sent to dispatcher and supervisor when the direct call creation for iBaan ERP 5.0c is unsuccessful.

A.2 E-FAQ mail types

ID	Name	Description
1	FAQ Notify Mail	Sent when the customer selects some FAQs on which he/she would like to be notified about updates
2	Notify on Change - Acknowledgment	Sent to the user in the notify list when a FAQ is modified with change classification is Major.
3	Stop Notify on Change	Sent to the user in the notify list when he/she wants to be removed from notification list of a FAQ.
4	Change in Mail ID	Sent when the user prefers to be notified in an alternative E-Mail ID.
5	FAQ Deletion	Sent when a FAQ that a user is to be notified about the changes, is deleted.