

iBaan E-Enterprise

**E-Service 2.1 SP1 User's Guide for
External users**

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About this document

This document is a User's Guide that describes the functions and features available to external users of the iBaan E-Service 2.1 application.

Users can be classified as either internal users or external users. An internal user is a user who belongs to the organization that hosts E-Service. An external user is a user who is not a part of the organization, but who uses E-Service. For example, a business partner, customer, or guest user of the organization becomes the external user of the E-Service application. Users can access the application over the Internet to utilize the various functions and features of E-Service.

This document serves as a guide for the external user and enables the external user to understand how to use the E-Service application. This document describes the various user interfaces and the functions and features available in E-Service for the external users.

No detailed knowledge is required to use this document. However, understanding the contents is easier if you have a general knowledge of iBaan E-Enterprise and the Baan application.

This document contains the following chapters:

Chapter 1, "Introduction," introduces the E-Service application and provides a brief overview of the various functions and features.

Chapter 2, "E-Service – functions and features," provides a detailed explanation of the various functions and features of the application. This chapter also describes the various user interfaces.

Chapter 3, "Miscellaneous," describes the additional features available to the user as a part of the E-Service application.

Terms and definitions used in the document

Terms	Definitions
User	<p>An individual who can access the E-Service application.</p> <p>User refers to either the customer, prospect, internal user, internal business partner, such as suppliers, subcontractors, and so on, of the company that uses E-Service to enable services over the Web.</p> <p>E-Service users can be classified as registered users or guest users.</p>
Registered User	<p>A registered user is a user who has a valid login and password to access E-Service.</p>
Guest User	<p>A user who does not have a valid login and password to access E-Service.</p> <p>This type of user can access E-Service as a guest user.</p>
Service Request	<p>The functionality in E-Service that the user can use to log all the queries.</p>
Frequently Asked Questions (FAQs)	<p>A functionality of E-Service that enables the user to get acquainted with general or product-related queries.</p>
Attachments	<p>Refers to the files that the user can send along with the service request to describe the problem specified in the service request.</p> <p>The service provider can also add attachments along with the solution provided to the service request.</p>
Trouble Shooting	<p>Refers to the functionality of E-Service where problems and solutions related to particular product category and question category is maintained. The user can intuitively browse through this problem and solution tree structure to arrive at the appropriate solution.</p>

1 Introduction

In the current market scenario, most companies strive to provide better services to customers to not only retain, but also increase the existing client-base.

In this scenario, companies can use the iBaan E-Service application to provide quick and efficient service to the customers. iBaan E-Service is a Web-enabled application that enables companies to provide services 24 hours a day, 7 days a week. Using E-Service, companies can not only provide round-the-clock services to customers, but also ensure that the services being offered are consistent to all the customers who access the application.

E-Service provides customers with two types of services: unassisted services and assisted services. Unassisted services include the FAQs and troubleshooting tips options available to users. These services are generic and identical for all customers. The assisted services, however, are more customized to individual requirements. Assisted services in E-Service include the ability of a user to raise a service request. The user can create a detailed description of the query and send the request to the service provider. The service provider then provides a solution to the query stated in the service request.

The following chapters describe the unassisted and assisted services available in E-Service.

E-Service provides the following options to resolve problems you might encounter:

- **FAQs:**

The Frequently Asked Questions option enables you to view the frequently asked queries related to general, as well as product-related information. For example, if the query is related to a computer and the type of question you have is related to how to install a particular type of software, you can view the procedure used to install the software as the solution to the query. The E-Service application provides users with the option to search the FAQs database. Users can view a question and the related answer based on a combination of the type of product and the questions related to the product. An FAQ is associated with a unique identification number, which can be used to search for the required FAQ. You can also search for the required FAQ based on a keyword that is present in the service request.

- **Troubleshooting:**

The troubleshooting tool is an interactive tool that enables the user to browse through a set of interlinked questions and answers related to a product.

- **Service Request:**

If you fail to locate a suitable solution to your problem using the FAQs database and the troubleshooting tips, you can use the E-Service application to log a service request. The service provider will provide a solution based on the problem specified in the service request.

The following list describes the procedure in which the user can use the unassisted and assisted services available in the application:

- 1 The customer logs on to the application.
- 2 The customer can search the FAQs database
- 3 If the customer cannot find a relevant solution to the problem in the FAQs database, the customer can use the troubleshooting option.
- 4 If the troubleshooting tips also do not help, the customer can create a service request.
- 5 The service request, when submitted, reaches the service provider.
- 6 The service provider offers a solution to the service request.
- 7 If the customer is satisfied with the solution that is provided, the process ends.
- 8 If the customer is not satisfied, the service request is sent back to the service provider and the cycle continues until the customer is satisfied.

The E-Service application is available to the customer in the following three modes:

- **Stand-alone mode:**

You can use E-Service as a stand-alone application.

- **Integrated with iBaan ERP 5.0c:**

You can integrate E-Service with iBaan ERP 5.0c as the back-end application.

- **Integrated with Baan IVc4:**

You can integrate E-Service with Baan IVc4 and you can integrate E-Service with the existing ERP as the back-end application.

The following sections describe the functions and features of E-Service in detail based on the mode in which E-Service is being used.

2 E-Service functions and features

This chapter describes the functions and features of the E-Service application and describes the user interfaces in E-Service.

This chapter is divided into the following sections:

- E-Service logon page and home page:
Describes the options available on the Logon page and the various panes in the home page of the E-Service application.
- Frequently Asked Questions:
Introduces and describes the Frequently Asked Questions functionality. This section also describes the procedure used to locate the required FAQ using the various search options.
- Troubleshooting:
Introduces and describes the procedure used to access the troubleshooting tips available in E-Service.
- Service Request:
Introduces and describes the procedure used to create and track a service request in E-Service. This chapter is further sub-divided into the following sections:
 - Create service request:
Describes the procedure that you must use to create a service request in E-Service as a stand-alone application and when E-Service is integrated with iBaan ERP 5.0c and Baan IVc4.
 - Track Service Request:
Describes the procedures the user must use to track the service requests in E-Service as a stand-alone application and when E-Service is integrated with iBaan ERP 5.0c and Baan IVc4.

E-Service logon page and home page

This section is divided into two sub sections. The first section, “E-Service logon page,” describes the options available on the logon page of the E-Service application. The second section, “E-Service home page,” describes the various panes and functions available to the user in the home page.

Logon page

The Logon page is the first page that is available to the user in the E-Service application:



Figure 2-1 E-Service logon page

This page contains of the following options:

- **iBaan E-Service:**
Use this option to access the E-Service home page.
- **Re-logon:**
A registered user to whom the administrator has assigned a user ID and password must use this option to access the logon page for registered users.
- **Registered User:**
A user to whom the administrator has assigned a user ID and password.
- **Guest User:**
A user who is a potential user of the application. All the functions and features available to the registered user are available to the guest user, with the exception that the guest users must enter an e-mail address for authentication, because the guest user profile is not available in the database.

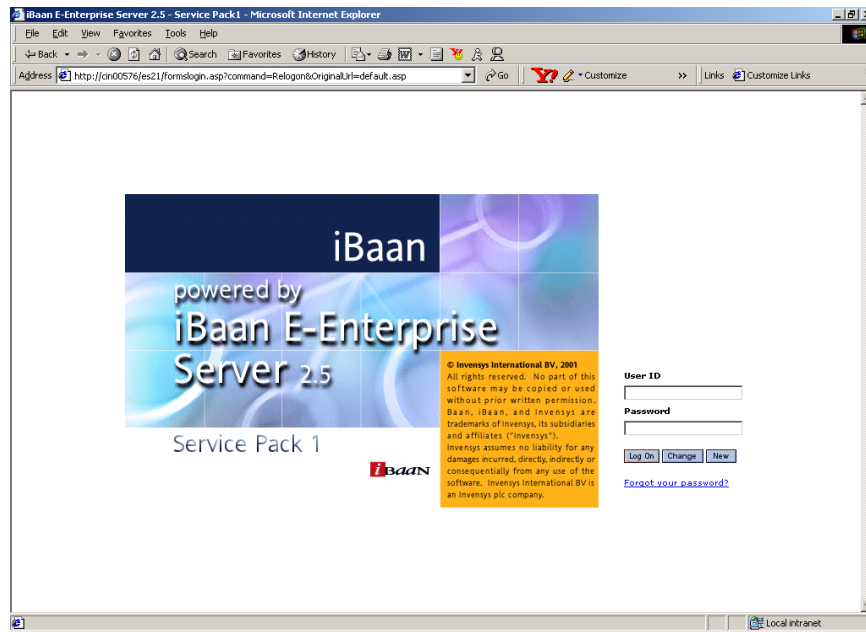


Figure 2-2 E-Service logon page for registered users

On this page, a registered user must enter the following:

- **User ID:**
Enter the User ID that is assigned to you by the administrator.
- **Password:**
Enter the password that must be used to authenticate the user ID.

Click **Log On** to access the E-Service home page.

The following sections describe the additional options that you can use on the Logon page.

Change

Use this option to change your profile and password.

Enter your user ID and password and click **Change** to access the Change User Registration page:

The screenshot shows a web browser window with the title 'Baan E-Enterprise Server 2.5 - Service Pack1'. The address bar displays the URL 'http://cn00576/es21/formslogin.asp?command=Relogon&OriginalUrl=default.asp'. The main content area is titled 'Change User Registration' and contains a form with the following fields:

- User ID: [text box]
- Password: [password box]
- Verify Password: [password box]
- Secret Question: [text box]
- Secret Answer: [text box]
- First Name: [text box]
- Last Name: [text box]
- Company Name: [text box]
- Phone Number: [text box]
- E-mail: [text box]
- Position: [text box]
- Language: [dropdown menu]
- Regional Settings: [dropdown menu]
- Country: [dropdown menu]
- Fax: [text box]
- Modem: [text box]
- Applications: [checkbox]
- Submit: [button]

Figure 2-3 Change User Registration page

The following table lists the data fields on this page:

Fields	Description
User ID	Used by the user to access the application. You cannot modify the value in this field.
Password	The password assigned to the user to authenticate the User ID. You can modify your password.
Verify Password	Enter the modified password again in this field to confirm the new password.
Secret Question	The secret question that is associated with the password. You can modify the secret question.

Secret Answer	The secret answer that you can use to remind you of your password. You can modify the secret answer.
First Name	The user's first name. You can modify the first name.
Last Name	The user's last name. You can modify the last name.
Company Name	The name of the company that is associated with the user. You can modify the company name.
Phone Number	The user's telephone number. You can modify the telephone number.
E-mail	The user's e-mail address. You can modify the e-mail address.
Position	The user's designation in the organization appears in this field. You can modify the user's position.
Language	The language that is used to view the labels in the application. You cannot modify the language.
Regional Settings	The regional setting of the user. You can modify the regional settings.
Country	The country in which the user is located. You can modify the country.
Fax	The user's fax number. You can modify the fax number.
Modem	The details related to the modem used to access the Internet appear in this field. You cannot modify the modem details.
Application	View the application that the user can access in this field. You cannot modify the value in this field.

Click **Submit** to save the modifications on this page.

New

Use the **New** option on the logon page to create a new user.

This page contains the following data fields:

Fields	Description
User ID	Enter the user ID that the user will use to access the application.
Password	Enter the password that the user can use to authenticate the user ID. A value in this field is mandatory.
Verify Password	Re-enter the modified password in this field to confirm the new password.
Secret Question	Enter a secret question that is associated with the secret question. A value in this field is mandatory.
Secret Answer	Enter a secret answer that is associated with the secret question. A value in this field is mandatory. The secret answer must not be similar to the secret question.
First Name	Enter the user's first name. A value in this field is mandatory.
Last Name	Enter the user's last name. A value in this field is mandatory.
Company Name	Enter the name of the company with which the user is associated.
Phone Number	Enter the user's telephone number.
E-mail	Enter the user's e-mail address. A value in this field is mandatory.
Position	Enter the position of the user in the company.
Language	Select the language that must be used to display the labels in the application.
Regional Settings	Select the regional settings that the user must use.
Country	Select the country in which the user is located.
Fax	Enter the FAX number that the user can user.
Modem	Enter the details related to the modem used to connect to the Internet.
Application	Select this check box to provide authorization to the new user to access the E-Service application.

Click **Submit** to save the new user profile.

E-Service home page

This section describes the various functions available to the user on the home page. Irrespective of whether you are a registered user or a guest user, the functions and features available to the user in the home page are the same.

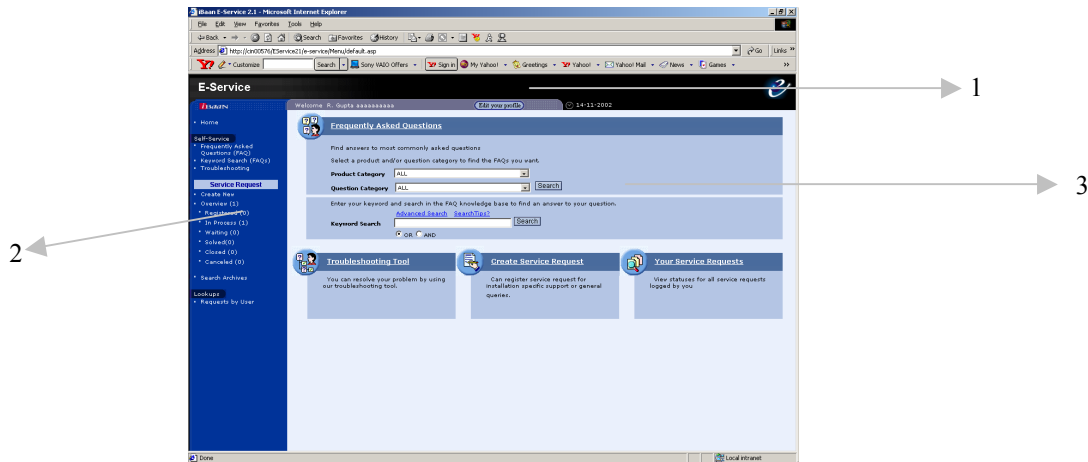


Figure 2-4 E-Service home page

The E-Service home page contains of the following panes:

1 E-Service pane:

If you are a registered user, the E-Service pane welcomes you with your user ID. If you are a guest user, the E-Service pane welcomes you as a guest user.

Click on the **E-Service** icon on this pane to access the E-Service logon screen. You can use this option to log in as a different user.

2 E-Service menu:

The user can select the required option on the menu to access the various functions of the E-service application.

The E-Service menu contains the Self Service section, which contains the following options:

- **Frequently Asked Questions (FAQ):**
Use this option to locate the frequently asked questions, based on the product and question categories.
- **Keyword Search (FAQs):**
Use this option to search the FAQ database, based on the word that is used in the FAQ.
- **Troubleshooting:**
Use this option to locate the product specific troubleshooting tips.
- **Your Service Request:**
Use the options available in the menu to create and track the service requests.
- **Home Option:**
Use the home option to access the E-Service home page from anywhere in the application.

The following sections describe all the options available on this menu.

3 Display pane: The options selected in the menu appear in this pane.

On the home page, the Display pane provides the following options, which are similar to the options available on the menu:

- Frequently Asked Questions
- Trouble Shooting Tool
- Create Service Request
- Your Service Requests

The following sections describe all the options available on the Display pane in detail in.

Frequently Asked Questions

Frequently Asked Questions enable the user to become acquainted with the frequently asked questions. The questions can be either generic or specific to a particular product. FAQs provide the user with general and product-related information.

To locate a frequently asked question and answer that might help you solve your problem, specify the product category and the question category.

You can either search the Frequently Asked Questions from the option available on the home page or use the link provided in the menu.

To search the FAQs database, you must specify the following:

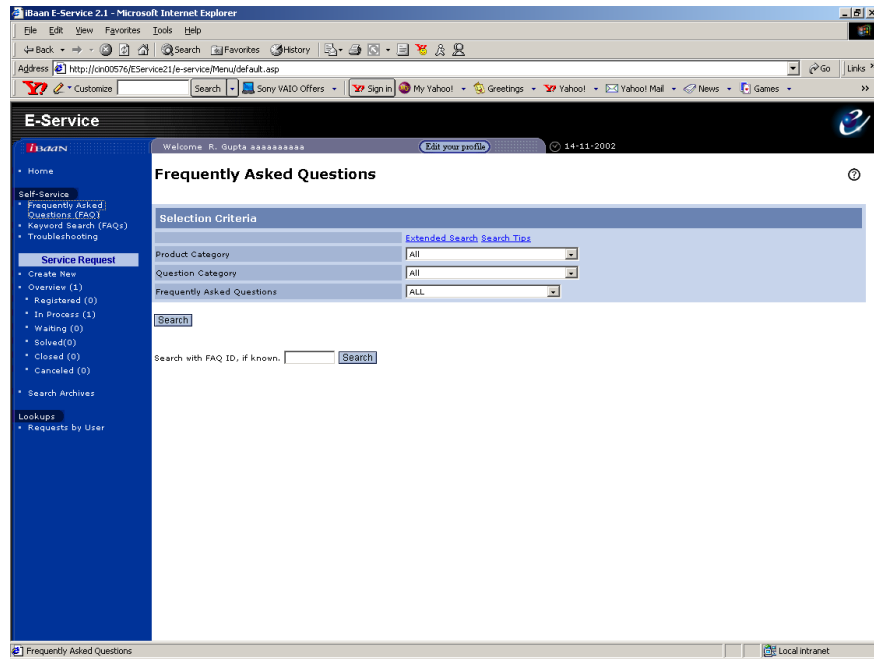


Figure 2-5 Frequently Asked Questions page

Specify the following selection criteria:

- **Product Category:** Select one of the products that appear to you based on the visibility defined for you by the administrator.
- **Question Category:** Select the question category. Based on the question category, you can classify the type of problem for which you must find a solution.

Click **Search** to locate the FAQs that meet the selection criteria

The search results appear on the same page:

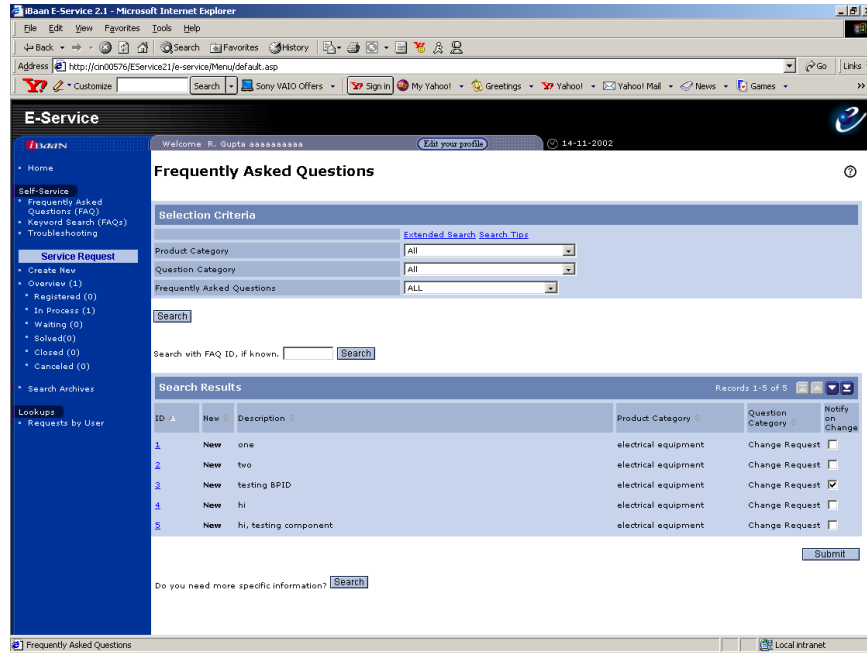


Figure 2-6 Frequently Asked Questions search results page

The user can view the following details related to the FAQs:

- **ID:** The unique identification code that is assigned to the FAQ.
- **New:** The status of the FAQ. Based on the parameter defined by the administrator, an FAQ is treated as a new FAQ for a specified period.
- **Description:** The description of the FAQ. Use the hyperlink provided for the description to view the FAQ details.
- **Product Category:** The product category of the FAQ appears in this field.
- **Question Category:** The question category of the FAQ appears in this field.

Click the link available for the FAQ description to view FAQ details:

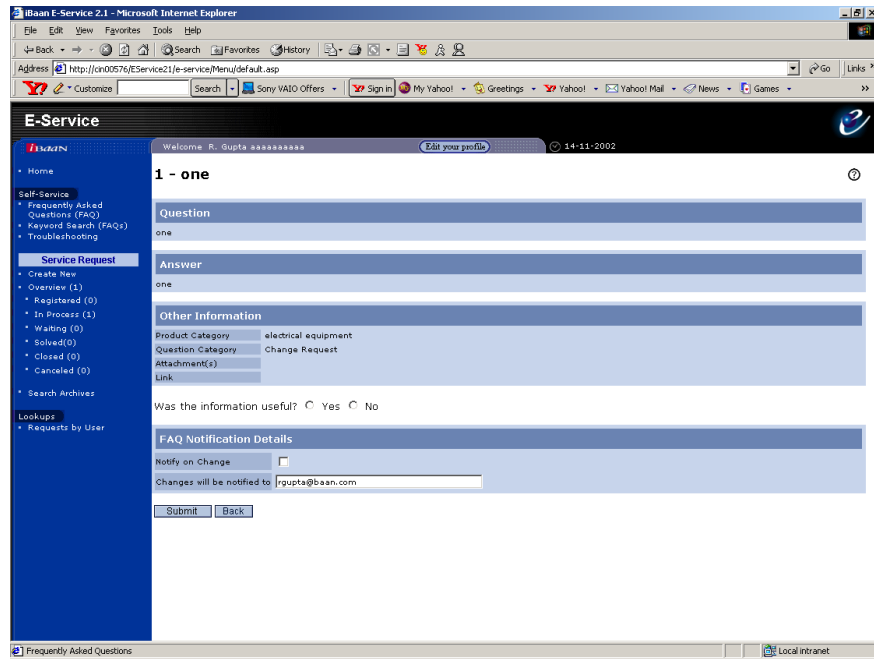


Figure 2-7 *Frequently Asked Questions details page*

You can view the following details related to the FAQ:

- **Question:** Displays the date, time, and question details.
- **Answer:** The date, time, and answer to the question.
- **Other Information:** The user can view the information related to the product category, question category, attachments, and links related to the FAQ.

Click the link provided for the attachments to view the attachment details. The attachment appears in a new window. The attachment can be in any file format.

Click **Back** to go back to the Frequently Asked Questions search results page. You can view the details of another FAQ based on the search results.

Search the FAQs database

Users can search the FAQs database in the following three ways:

- Keyword search
- Advance search
- Extended search

The following sections describe each of these search methods in detail.

Keyword Search

To use this option, you must click the **Keyword Search** option on the menu to access the Search in FAQ Knowledge Base page:

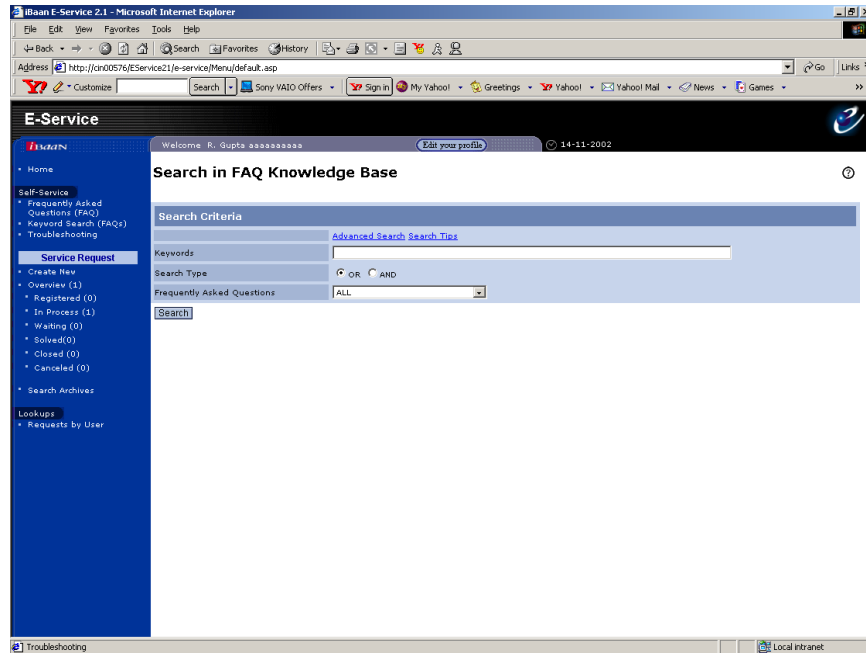


Figure 2-8 Search in FAQ Knowledge Base page

On this page, the user must enter the following details:

- **Keywords:**
Enter a word or set of words in this field. The word or a set of words must be part of the FAQ. The keywords can refer to the product category, the question category, the subject specified by the user, or the problem description. You must use a comma (,) or a semi-colon (;) to separate the words in this field.

- **Search Type:**

Select either **And** or **Or** in this field to determine the way in which the words you have entered in the **Keywords** field must be used.

Click **Search** to search the FAQs database.

The search results appear on the same page:

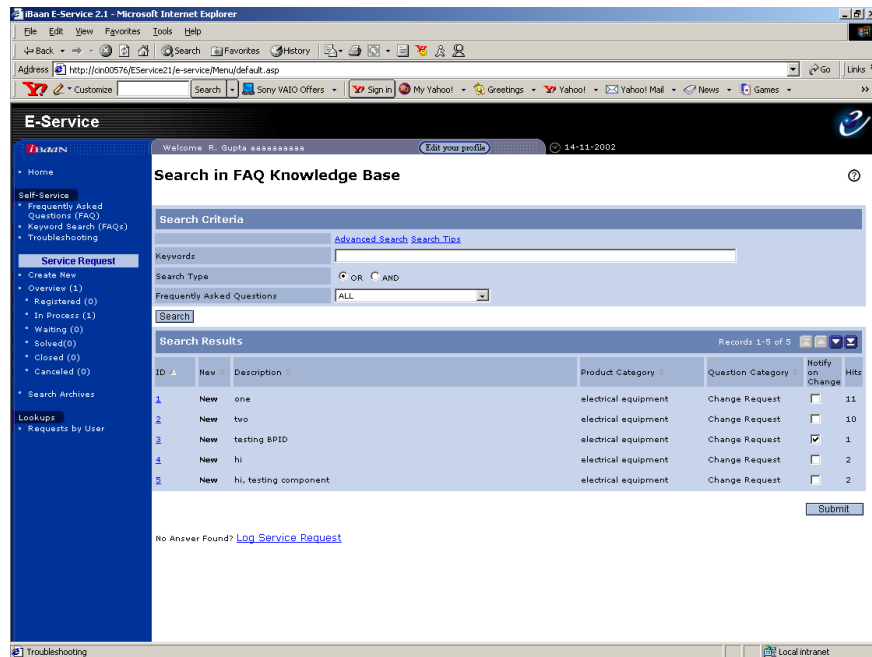


Figure 2-9 Search in FAQ Knowledge Base results page

The following details related to the search results appear:

- **ID:** Shows the FAQ ID.
- **New:** Based on the parameters defined by the administrator, an FAQ is considered new for a specific duration from the time the FAQ is created. Use this field to determine if the FAQ is new.
- **Description:** The description of the FAQ appears in this field. Use the hyperlink provided for the description to view the FAQ details.
- **Product Category:** The product category to which the FAQ belongs appears in this field.
- **Question Category:** The question category to which the FAQ belongs appears in this field.

- **Hits:** This field informs you of the number of times the specific FAQ all users have accessed the FAQ until now.

Click on the hyperlink available for the FAQ description to view the FAQ details.

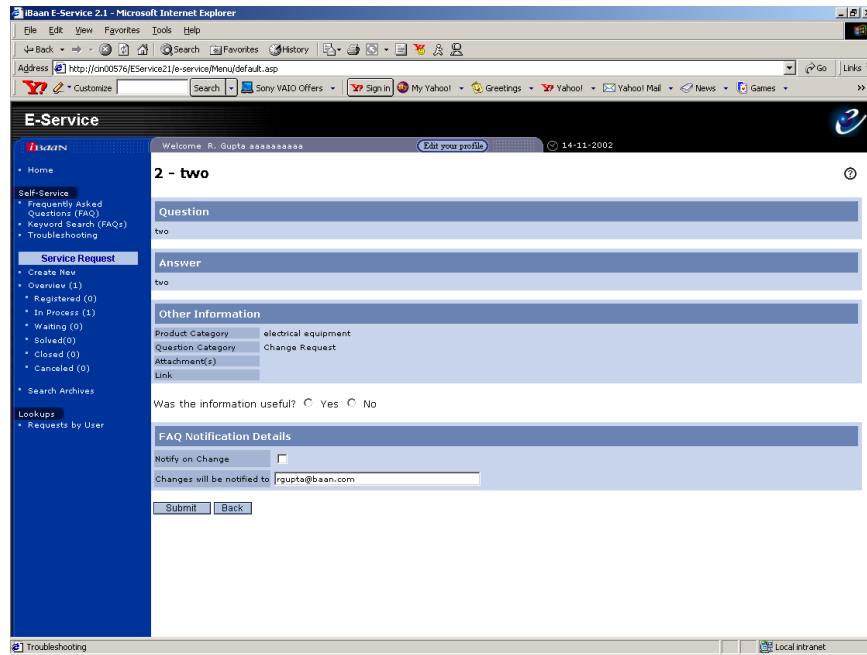


Figure 2-10 FAQ Knowledge Base Search detail page

You can view the following details related to the FAQ:

- **Question:** The detailed description of the question.
- **Answer:** The solution related to the question.
- **Product category:** The category to which the product specified in the FAQ belongs.
- **Question category:** The category to which the question in the FAQ belongs.
- **Attachment:** The file or folder, which is attached to the FAQ.

Click **Back** to go back to the Search in the FAQ Knowledge Base page.

Advanced Search

The Search in FAQ Knowledge Base page includes the **Advanced Search** option:

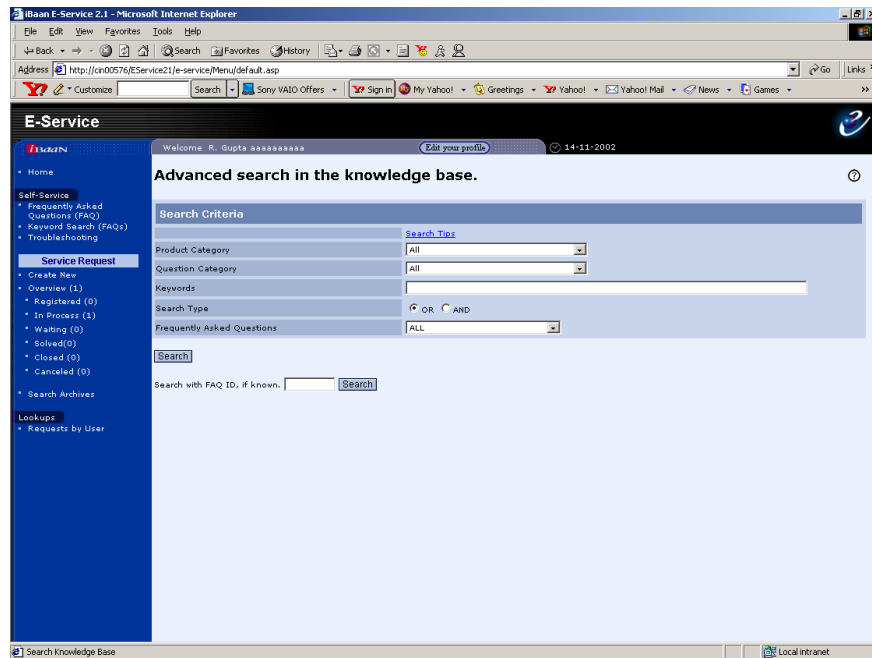


Figure 2-11 Advanced Search in Knowledge Base page

Enter the following details:

- **Product Category:**
Select the category to which the product belongs.
- **Question Category:**
Select the category to which the question belongs.
- **Keywords:**
Enter the keywords related to the FAQ. Use a comma (,) or semi-colon (;) to separate the keywords.
- **Search Type:**
Specify whether the keywords must be separated by **And** or **Or**.
- **Frequently Asked Questions:**
Specify the type of frequently asked questions based on which you must search the knowledge base.

Click **Search** to search the knowledge base.

The results appear on the same page:

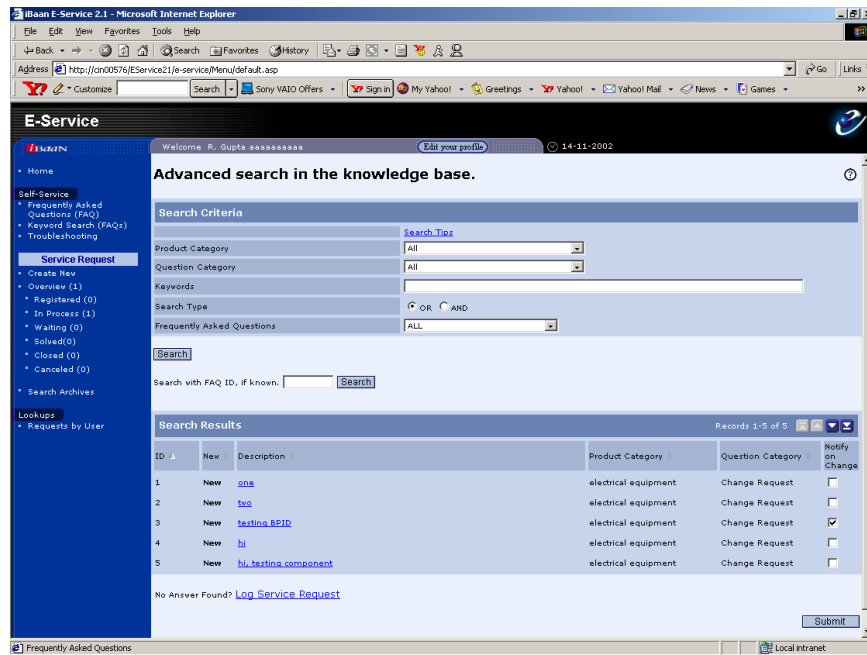


Figure 2-12 Advanced Search in Knowledge Base results page

The following details appear:

- **ID:** This field displays the FAQ ID.
- **New:** Based on the parameters defined by the administrator, an FAQ is considered as new for a specific duration from the time the FAQ is created. Use this field to determine if the FAQ is new.
- **Description:** The description of the FAQ appears in this field. Use the hyperlink provided for the description to view the FAQ details.
- **Product Category:** The product category to which the FAQ belongs appears in this page.
- **Question Category:** The question category to which the FAQ belongs appears in this field.

Click the **FAQ Description** link to view the FAQ details.

The Advance Search Result details page displays the following details:

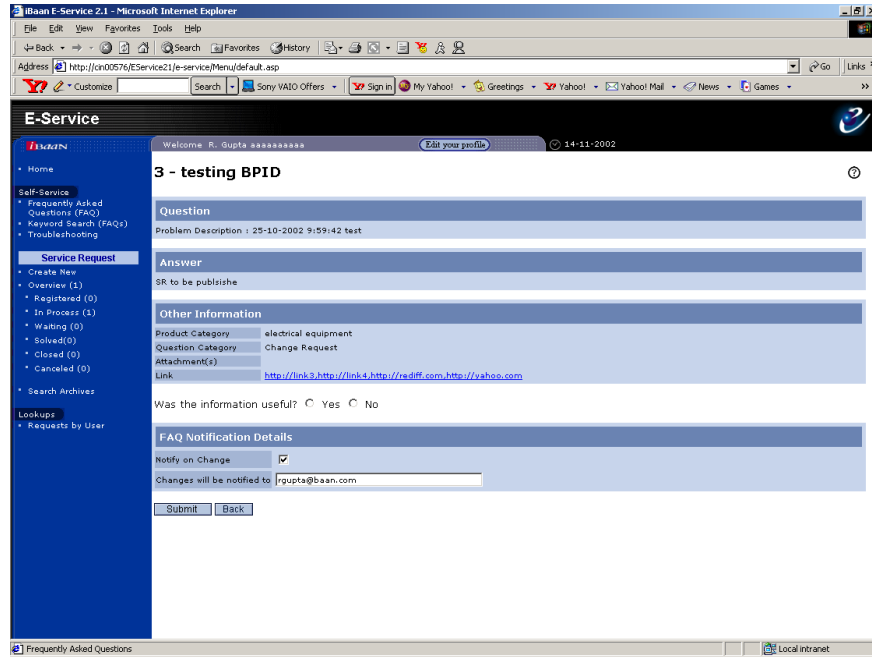


Figure 2-13 Advance Search Result details page

This page lists the following details related to the FAQ:

- Question.
- Answer.
- Product Category.
- Question Category.
- Attachment(s).
- Link.

Click **Back** to go back to the Advance Search in Knowledge Base page.

Extended search

The **Extended Search** option is available on the Frequently Asked Questions page. Click the **Extended Search** link on this page to access the Search in FAQ Knowledge Base page. This procedure you must use to use this page to search for the FAQ is described in “Keyword search,” previously in this chapter.

FAQ ID

Each FAQ that is added to the E-Service application is assigned a unique identification code, based on which the user can locate the FAQ quickly and efficiently.

Enter the FAQ ID and click **Search** to locate the required FAQ from the Frequently Asked Questions and the Advanced Search in the Knowledge Base pages.

To search in the FAQ database, you can either specify the selection criteria, that is, the product category and the question category, or you can enter the FAQ ID.

Search tips

The **Search Tips** option is available on the Search in FAQ Knowledge Base page and the Advanced Search in the Knowledge Base page.

Use this option to view the tips, which help the user to search the FAQs database:

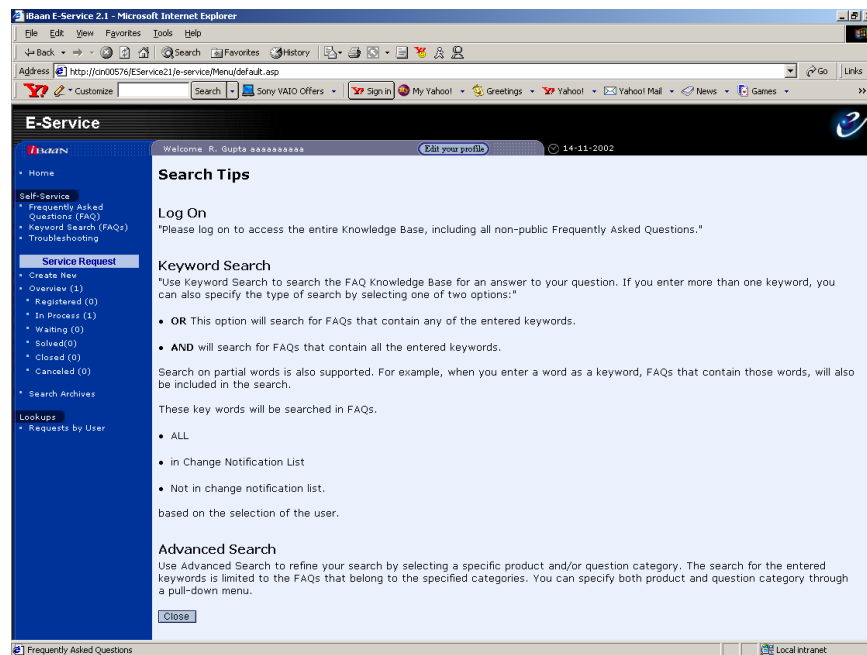


Figure 2-14 Search Tips page

Click **Close** to go back to either the Advanced Search in the Knowledge Base field or the Search in FAQ Knowledge Base page.

Troubleshooting

The troubleshooting functionality of E-Service enables you to figure out a solution for a particular problem with the product. Troubleshooting tips are classified based on the product to which the tips belong. The problems and solutions related to the product appear in sequential format. For example, if you select a product, the problems related to that product and their probable solutions appear, in addition to the fact that the solutions are again linked with follow up problems and so on. You can browse through the various problems and solutions combinations to locate the exact solution you are looking for.

This section describes the procedure you can use to locate the required troubleshooting tips.

No difference exists in the functionality for registered users and guest users. A user can access E-Service either as a stand-alone application or integrated with the iBaan ERP back end to access the troubleshooting tips.

To access the troubleshooting tips, take the following steps:

- 1 Click **Troubleshooting** on the E-Service menu:

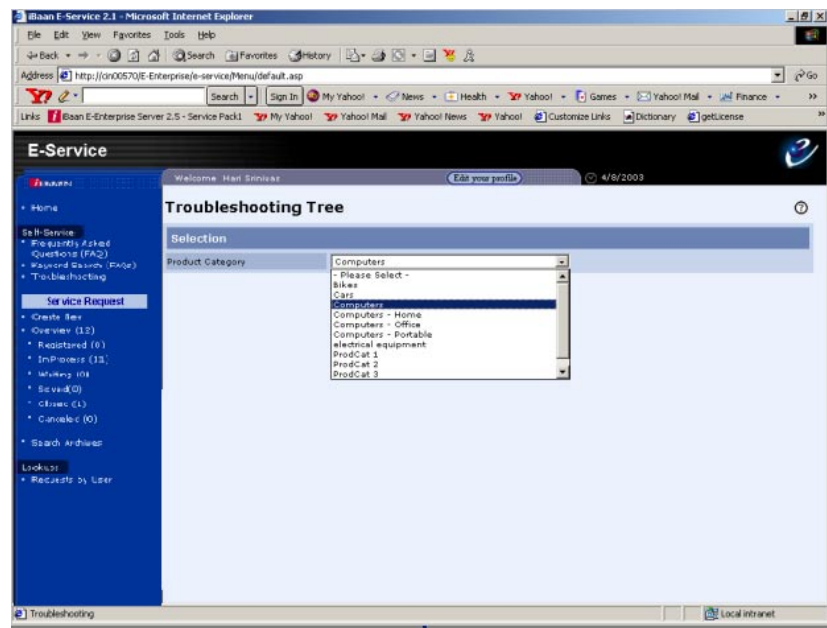


Figure 2-15 Troubleshooting page

2 Select a product category on the Troubleshooting Tree page:

The product categories appear to you based on the visibility the administrator defined for you.

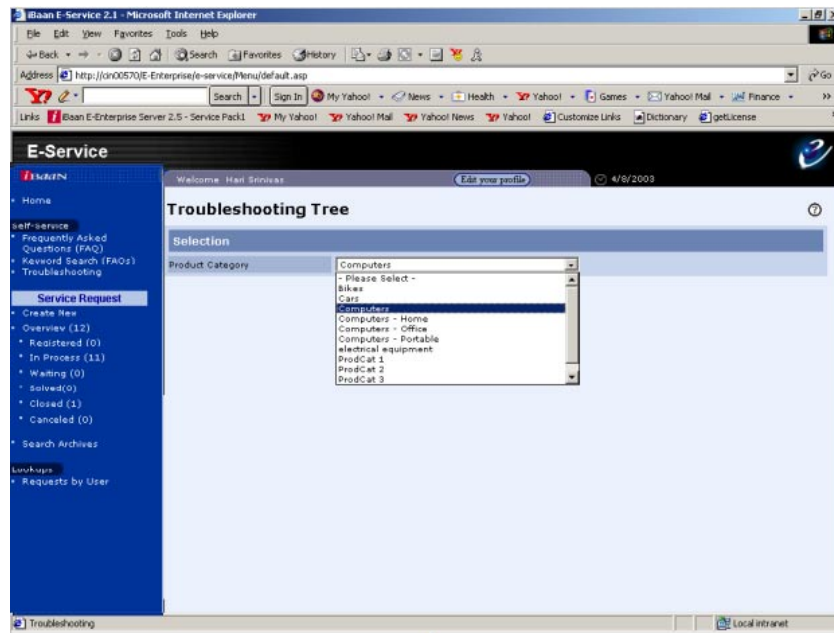


Figure 2-16 Troubleshooting page

To view the troubleshooting tree in the Troubleshooting pane, select a product specific to the product category:

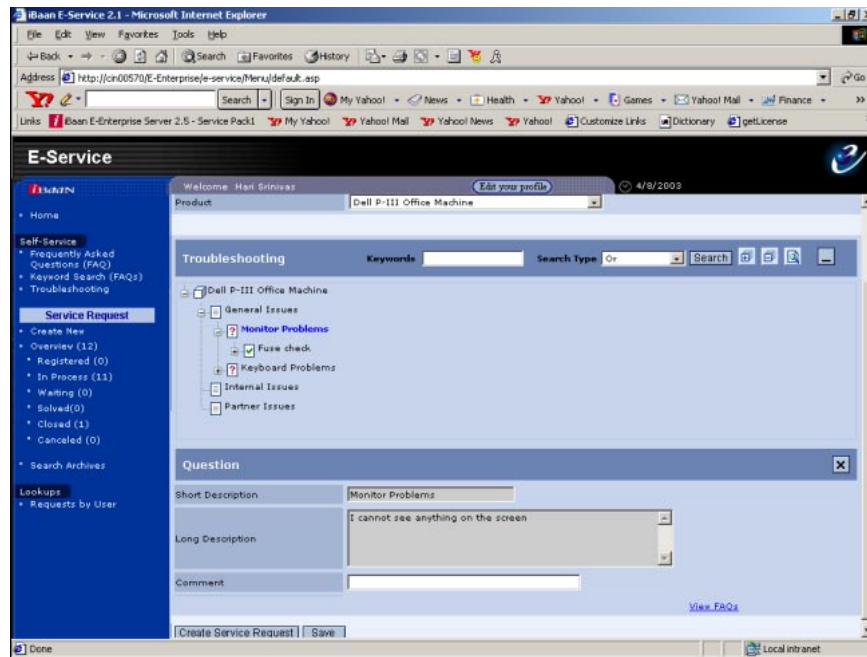


Figure 2-17 Troubleshooting pane

The Troubleshooting pane displays the product and the troubleshooting category as the first two levels of the troubleshooting tree.

The options available in this pane enable you to do the following:

- Expand or collapse the tree.
- Search for the required node in the tree, based on a keyword or a combination of keywords using the Boolean operators, such as And, Or, or Exact Phrase.

You must select the required node to view the details in the third pane, which could be a Troubleshooting Category pane, Question Pane, Answer Pane, or Action pane, based on the type of node you select in the troubleshooting tree.

The third pane contains the following fields:

- **Short Description:** This field provides the short description that is used to identify the troubleshooting category, question, answer, or action.
- **Long Description:** This field displays the long description, which provides the user with a detailed explanation related to the troubleshooting category, question, answer, or action.
- **Comment:** Use this field to enter a comment. If you are not satisfied with the troubleshooting tips and use the **Create Service Request** option to create a service request, the comments are added to the service request as a Troubleshooting.txt file. This file enables the service provider to find more information related to your problem.
- **See Also:** Use this link for further information related to the node you have selected. Additional information can be provided in the form of a link to a Web site or to another node in the troubleshooting tree.
- **View FAQs:** Use this link to view the information available in the form of a Frequently Asked Question.

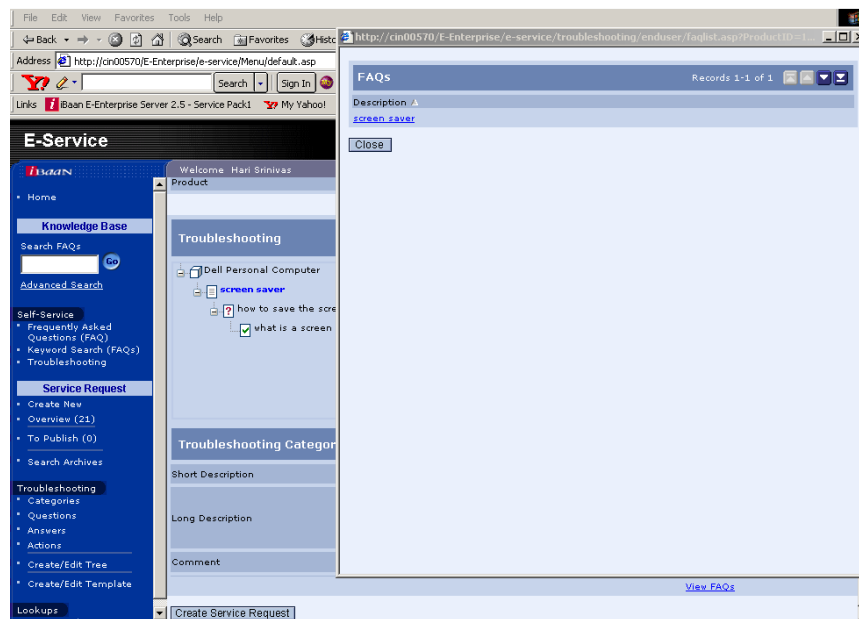


Figure 2-18 FAQs list

The list of Frequently Asked Questions appears in a new page, as shown in the previous figure. Use the hyperlink available for the FAQ description to view the FAQ details.

You can view the following FAQ details.

- **Question:** Details of the Frequently Asked Question.
- **Answer:** The answer to the Frequently Asked Question.
- **Other Information:** You can view the additional information related to the product category and question category to which the FAQ belongs. You can also view a link that is provided for the FAQ to provide additional details.
- Click **Back** on this page to go back to the FAQs page.
- Click **Close** on the FAQs page to go back to the Troubleshooting page.

Click the **Create Service Request** option in the Troubleshooting page to access the page used to create a service request.

Click the **Save** option in the Troubleshooting page to retain the comment you entered for the specific node.

3 Service request

If you fail to find a solution to the problem in the knowledge base or FAQ, you must use the **Service Request** option to convey your problem to the service provider, who in turn answers your query. The first section in this chapter describes the procedure that you must use to create the service request, and the second section describes the procedure you must use to track the service request until you are satisfied with the solution the service provider finds for you.

Create Service Request

This section describes the procedure you must use to create a service request. The procedure you must use to create a service request varies based on the mode of the application and the user role assigned to you by the administrator. E-Service can exist as a stand-alone application or can be integrated with iBaan ERP 5.0c and Baan IVc4. The registered users and the guest users can access the application in any of the three modes and create a service request. The subsequent sections of this section describe the various procedures you must use to create a service request based on the mode of the application and the user roles.

To create a service request, you can use any of the following options:

- Click the **Create New Service Request** option on the E-Service menu.
- Click the **Create a Service Request** link on the Troubleshooting page.
- Click the **Create a Service Request** link on the Troubleshooting page.

As a result, the user can now access the Create Service Request page.

E-Service as a stand-alone application

In the stand-alone application, based on the user type the administrator assigned to you, use the following procedures to create a service request.

Registered user

If you are a registered user, to create a service request, you can enter the required details on the Create Service Request page.

Figure 3-1 Create Service Request page

The Create Service Request page contains of the following fields:

- **Product Category:** Select the product category. You can view the list of product categories based on the visibility the administrator defined for you.

If you used the **Create Service Request** link on the Troubleshooting page to access this page, the value in this field appears by default based on the product category you selected to search for the troubleshooting tips.

- **Product:** Select the product that is specific to the product category. You can view the list of product categories based on the visibility defined for you by the administrator.

If you used the **Create Service Request** link on the Troubleshooting page to access this page, the value in this field appears by default based on the product category you selected to search for the troubleshooting tips.

- **Troubleshooting:** Use the link to view the troubleshooting tree related to the product category and product you selected.
- **Question Category:** Select the category in which your question belongs.
- **Subject:** Enter the subject of the service request. A value in this field is mandatory. You cannot submit a service request without specifying a subject.
- **Problem Description:** Enter a detailed description of the problem. A value in this field is mandatory. You cannot submit a service request without entering the problem description.

The **Subject** and **Problem Description** fields are mandatory. You cannot submit a service request without a value in these fields.

Attachments

You can add attachments to the service request to describe the problem better. Click the **Attachments** option to add attachments to the service request. The attachments can be in any file format. You can use the options on the Attachments page to attach any number of attachments to the service request.

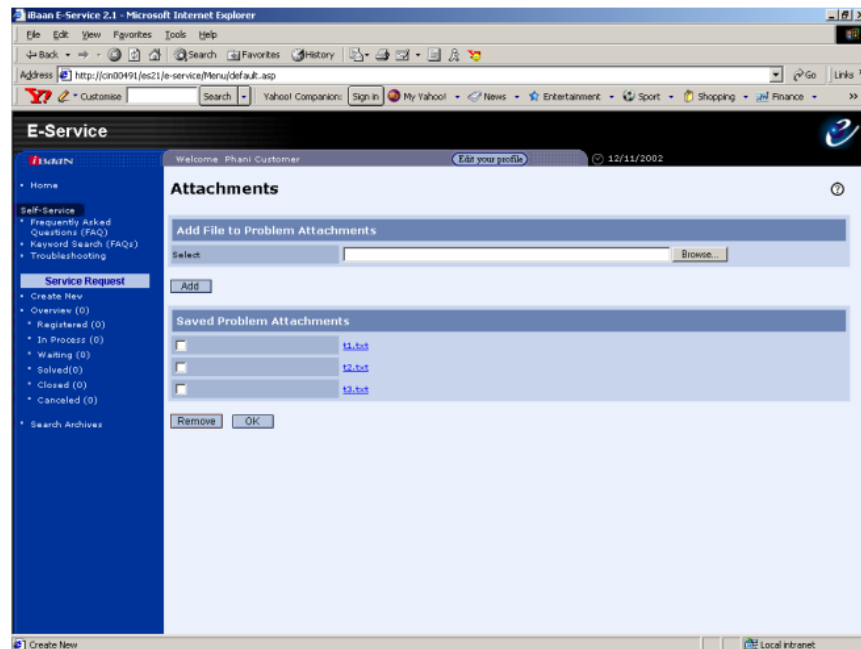


Figure 3-2 Attachments page

- 1 Click **Browse** to select the required file or folder that you must add to the service request.
- 2 Click **Add** to add the attachment to the service request.

Repeat Steps 1 and 2 to add additional attachments to the service request.

- 3 Select the check box that corresponds to the attachment and click **Remove** to remove the attachment from the service request. After you submit the service request, you can no longer modify the existing attachments. However, you can add more attachments and then re-send the service request.
- 4 Click **OK** on the Attachments page to go back to the Create Service Request page.

- 5 Click **Submit** on the Create Service Request page to submit the service request.
- 6 Click **Close** on the Create Service Request page to go back to the home page.

After you submit a service request, the following Thank You page opens:

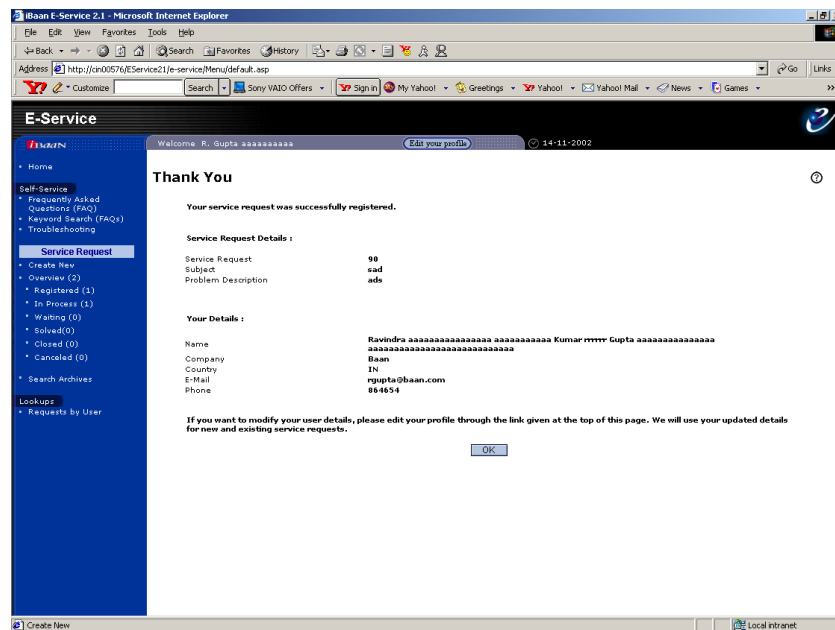


Figure 3-3 Thank You page

This page provides the following details:

Service Request Details:

- Service Request: The service request identification code.
- Subject: The subject of the service request.
- Problem Description: The problem description specified in the service request.

Your Details:

- Name
- Job Title
- Company
- Country
- E-mail
- Phone

An e-mail notification is also sent to you, which confirms receipt of the service request.

Guest user

If you are a guest user of the application, to create a service request, you can use any of the following options:

- Click the **Create New Service Request** option on the menu of the E-Service home page.
- Click the **Create a Service Request** link on the Troubleshooting page.

You can now access the Create Service Request page:

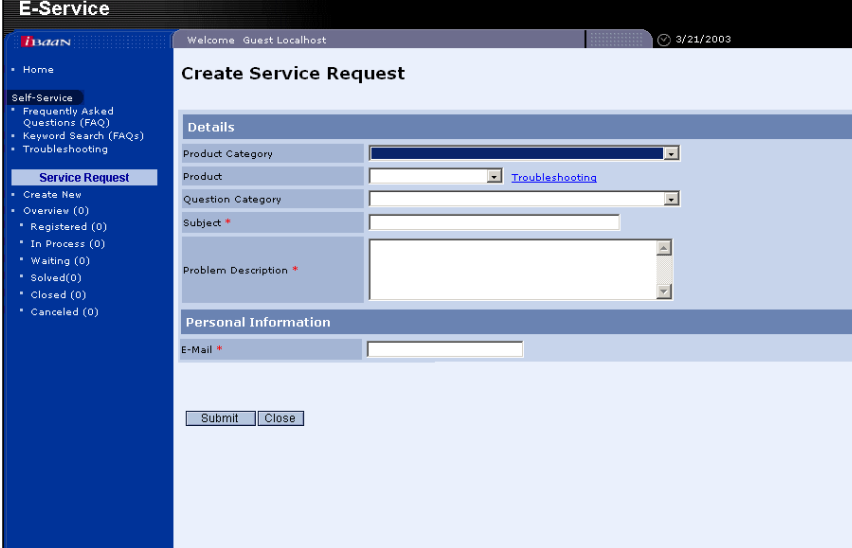


Figure 3-4 Create Service Request page

The Create Service Request page contains of the following fields:

- **Product Category:** Select the product category. You can view the list of product categories based on the visibility defined for you by the administrator.

If you access this page using the **Create Service Request** link on the Troubleshooting page, the value in this field appears by default based on the product category you selected to search for the troubleshooting tips.

- **Product:** Select the product that is specific to the product category. You can view the list of product categories based on the visibility defined for you by the administrator.

If you accessed this page using the **Create Service Request** link on the Troubleshooting page, the value in this field appears by default based on the product category you selected to search for the troubleshooting tips.

- **Troubleshooting:** Use the link to view the troubleshooting tree related to the product category and product you selected.
- **Question Category:** Select the category to which your question belongs.
- **Subject:** Enter the subject of the service request.
- **Problem Description:** Enter a detailed description of the problem.
- **E-mail:** Enter your e-mail address. A system-generated personal identification number (PIN) is sent in an e-mail message. You must use the e-mail and the PIN to identify yourself the next time you access the application to track the service request. Click **Submit** to add the contact information. If the Personal Identification Number (PIN) is already assigned, you do not have to enter the contact information.

Figure 3-5 Create Service Request page

The **Subject**, **Problem Description**, **E-mail**, and **Contact Information** fields are mandatory. You cannot submit a service request without a value in these fields.

- Click **Submit** on the Create Service Request page to submit the service request.
- Click **Close** on the Create Service Request page to go back to the home page.

After you submit a service request, the following Thank You page appears:

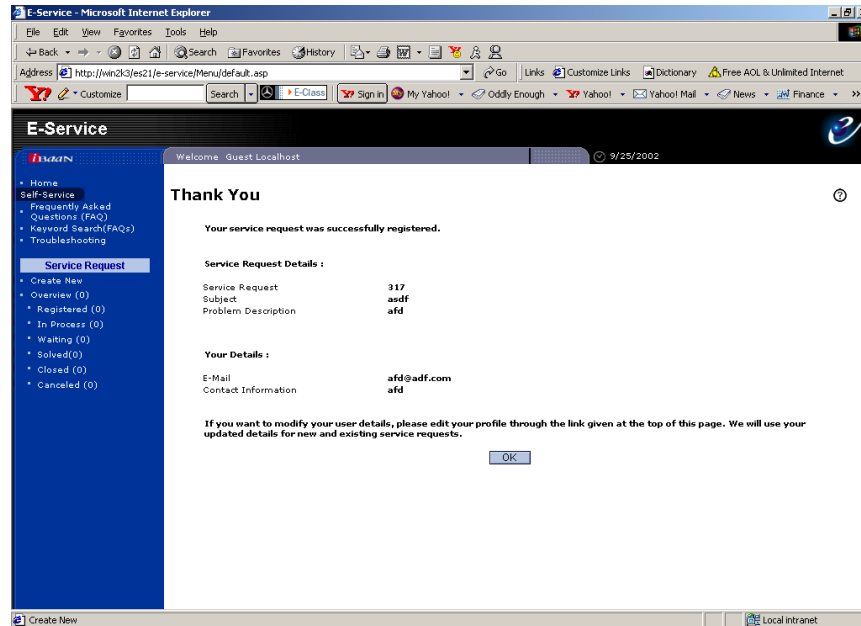


Figure 3-6 Thank You page, submit service request

This page provides the following details:

Service Request Details:

- Service Request: The service request identification code.
- Subject: The subject of the service request.
- Problem Description: The problem description specified in the service request.

Your Details:

- E-mail
- Contact Information:

An e-mail notification is also sent to you to confirm receipt of the service request.

E-Service integrated with iBaan ERP 5.0c

This section describes the procedure that you must use to create a service request in E-Service if E-Service is integrated with iBaan ERP 5.0c in the back end based on the user role assigned to you by the administrator. Based on the user role, an external user of the application can be classified as a registered user, privileged user, or guest user.

Registered user

You must be a registered user of the application to utilize the functions available in E-Service when the application is integrated with iBaan ERP in the back end.

To create a service request, you must use the Create Service Request page. You can access this page using the **Create New** option on the menu, or click the **Create Service Request** link on the Troubleshooting page.

Figure 3-7 Create Service Request page

To create a service request, enter the following details on this page.

- **Product Category:**
Select the product category. You can view the list of product categories based on the visibility defined for you by the administrator.

If you accessed this page by using the **Create Service Request** link on the Troubleshooting page, the value in this field appears by default based on the product category you selected to search for the troubleshooting tips.

- **Product:** Select the product that is specific to the product category. You can view the list of product categories based on the visibility defined for you by the administrator.

If you have accessed this page by using the **Create Service Request** link on the Troubleshooting page, the value in this field appears by default based on the product category you selected to search for the troubleshooting tips.

- **Troubleshooting:** Use the link to view the troubleshooting tree related to the product category and product you have selected.
- **Question Category:**
Select the category to which your question belongs.
- **Subject:**
Enter the subject of the service request. A value in this field is mandatory. You cannot submit a service request without specifying a subject.
- **Problem Description:**
Enter a detailed description of the problem. A value in this field is mandatory. You cannot submit a service request without entering the problem description.

In addition to these details, you can specify the advance details, which include the following:

- **Site:**
Select the site. Click **Clear** to remove the value you have selected.
- **Installation:**
Select the Installation. Click **Clear** to remove the value you have selected.
- **Installation Number:**
The installation number appears by default based on the installation code you have selected.

- **Serial Number:**
Select or enter the serial number. If you enter the serial number, click **Verify** to validate the serial number. If the serial number you have entered is incorrect, an error message appears when you validate the serial number. Based on the serial number you have entered or selected, the data appears by default in the **Site**, **Installation**, and **Installation Number** fields. Click **Clear** to remove the value you have selected.
- **Problem Code:**
Select the problem code. A value in this field is mandatory. Click **Clear** to remove the value you have selected.
- **Problem Priority:**
Select the problem priority. Click **Clear** to remove the value you have selected.
- **Reference:**
Enter the text, which could be used to provide reference to the service provider.
- Click **Submit** to send the service request to the service provider.
- Click **Close** to go back to the E-Service home page.

- Click **Submit** to access the Thank You page:

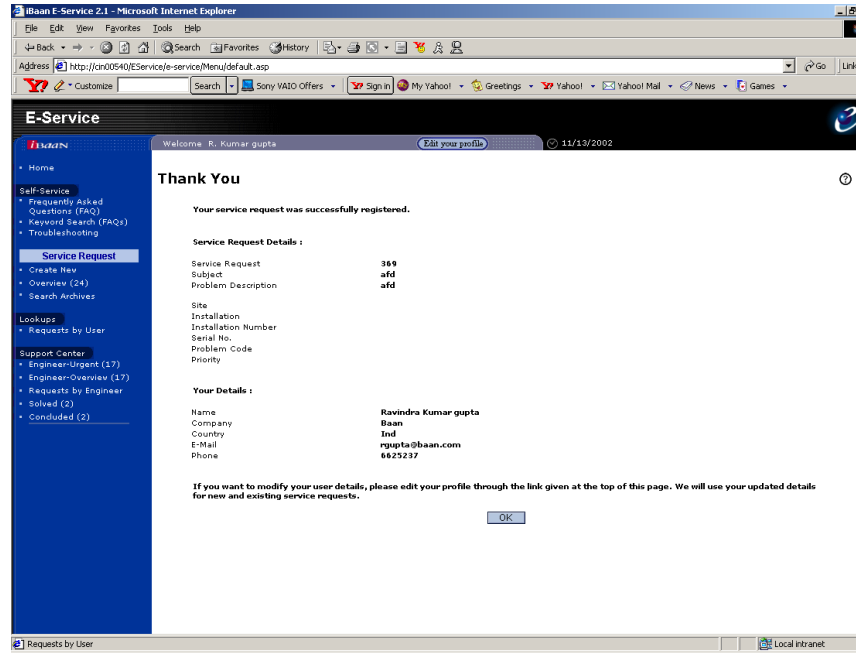


Figure 3-8 Thank You page

This page provides you with the following details:

Service Request Details:

- Service Request:
- Product category
- Question category
- Subject
- Problem Description
- Site
- Installation
- Installation Number
- Serial Number
- Priority
- Reference

Your Details:

- Name
- Company
- E-Mail
- Phone

Click **OK** on this page to go back to the Your Requests page, which provides an overview of all the service requests you have created.

An e-mail message is sent to your e-mail address to confirm receipt of the service request.

Privileged user

A registered user or a guest user can be classified as a privileged user, based on the company parameters and the user role assigned to the user by the administrator.

If E-Service is integrated with iBaan ERP 5.0c in the back end, the administrator can specify the following parameters for a registered user:

Company Level	User Role Level	Privileged User
YES	N/A	YES
NO	YES	YES
NO	NO	Normal Registered User

If the administrator defines the parameter at company level, all the registered users are classified as privileged users.

If the administrator defines the parameter at user-role level, only specific registered users are classified as privileged users.

If E-Service is integrated with iBaan ERP 5.0c in the back end, the administrator can specify the following parameters for a guest user.

Company Level	User Role Level	Privileged User
YES	N/A	YES
NO	YES	YES
NO	NO	Normal Guest User

If the administrator defines the parameter at company level, all the guest users are classified as privileged users.

If the administrator defines the parameter at user-role level, only specific guest users are classified as privileged users.

A privileged user can create a service request that can be routed to a call center or a support center, based on the **Routing Option** parameter defined by the administrator. A privileged user can directly register a service request in the support center rather than route the service request through the call center.

For a privileged user, the administrator can define the following routing options:

- **Case 1: Call Center:** In this case, the service request created by the privileged user is routed to the call center. Based on the dispatching rules applicable for the application, the service request is either automatically or manually assigned to the call center engineer.
- **Case 2: Support Center:** In this case, the service request created by the privileged user is routed directly to the support center. Based on the dispatching rules applicable for the application, the service request is either automatically or manually assigned to the support center engineer.
- **Case 3: User Choice:** In this case, the user can specify if the service request must be routed to the call center or the support center.

This section describes the procedure that the privileged user must use to create a service request if the routing option is **User Choice**.

To create a service request, you must use the Create Service Request page. You can access this page by using the **Create New** option on the menu, or the **Create Service Request** link on the Troubleshooting page/home page.

To create a service request, enter the following details on this page:

Figure 3-9 Create Service Request page

- **Product Category:**

Select the product category. You can view the list of product categories based on the visibility defined for you by the administrator.

If you have accessed this page by using the **Create Service Request** link on the Troubleshooting page, the value in this field appears by default based on the product category you selected to search for the troubleshooting tips.

- **Product:** Select the product that is specific to the product category. You can view the list of product categories based on the visibility defined for you by the administrator.

If you accessed this page by using the **Create Service Request** link on the Troubleshooting page, the value in this field appears by default based on the product category you selected to search for the troubleshooting tips.

- **Troubleshooting:** Use the link to view the troubleshooting tree related to the product category and product you have selected.

- **Question Category:**

Select the category to which your question belongs.

- **Subject:**
Enter the subject of the service request. A value in this field is mandatory. You cannot submit a service request without specifying a subject.
- **Problem Description:**
Enter a detailed description of the problem. A value in this field is mandatory. You cannot submit a service request without entering the problem description.
- **Register In:**
 - If you select the **Call Center** option, the service request created by the user is routed to the call center. Based on the dispatching rule applicable for the application, the service request is either automatically or manually assigned to the call center engineer.
 - If you select the **Support Center** option, the service request created by the user is routed directly to the support center. Based on the dispatching rules applicable for the application, the service request is either automatically or manually assigned to the support center engineer.

NOTE

The user cannot view this field if the administrator sets the routing option to **Call Center (CC)** or **Support Center (SC)**. In that case, the service request is automatically routed to the CC or SC, based on the routing option defined for the application.

In addition to these details, you can specify the advance details, which include the following:

- **Site:**
Select the site. Click **Clear** to remove the value you have selected.
- **Installation:**
Select the Installation. Click **Clear** to remove the value you have selected.
- **Installation Number:**
The installation number appears by default based on the installation code you have selected.
- **Serial Number:**
Select or enter the serial number. If you enter the serial number, click **Verify** to validate the serial number. If the serial number you have entered is incorrect, you receive an error message when you validate the serial number. Based on the serial number you have entered or selected, the data appears by default in the **Site**, **Installation**, and **Installation Number** fields. Click **Clear** to remove the value you have selected.

- **Problem Code:**
Select the problem code. A value in this field is mandatory. Click **Clear** to remove the value you have selected.
- **Problem Priority:**
Select the problem priority. Click **Clear** to remove the value you have selected.
- **Reference:**
Enter the text, which can be used to provide reference to the service provider.
- Click **Submit** to send the service request to the service provider.
- Click **Close** to go back to the E-Service home page.
- Click **Attachments** to add attachments to the service request.

If you click **Submit** on the Create Service Request page, you can view the Thank You page:

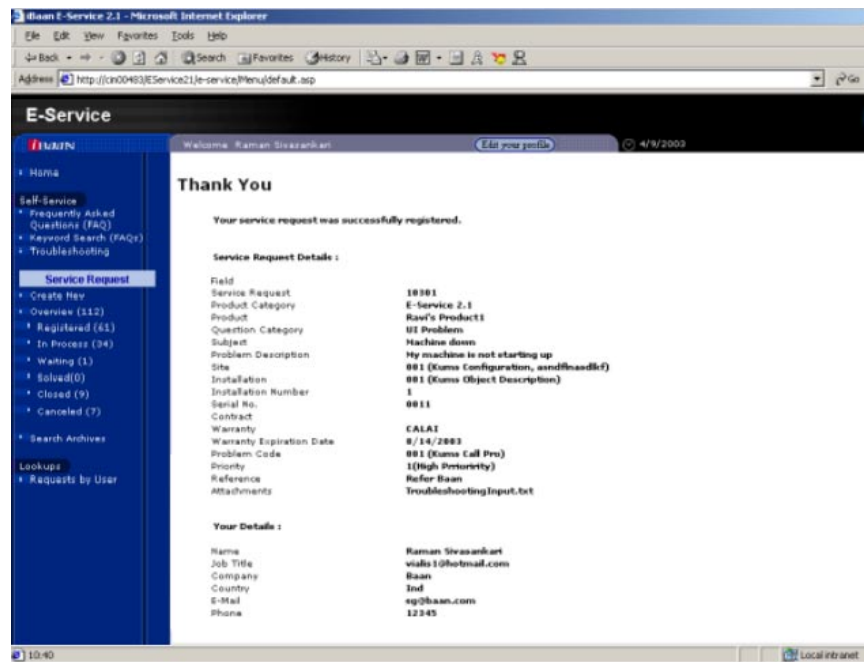


Figure 3-10 Thank You page

This page provides you with the following details:

Service Request Details:

- Service Request:
- Product category
- Question category
- Subject
- Problem Description
- Serial Number
- Contract
- Warranty
- Warranty Expiration Date
- Site
- Installation
- Installation Number
- Serial Number
- Priority
- Reference

Your Details

- Name
- Company
- E-Mail
- Phone

Click **OK** on this page to go back to the Your Requests page, which provides an overview of all the service requests you have created.

Use the **Edit your Profile** option to modify the details in your profile. For more information about the details you can modify in your profile, refer to “Logon page,” in Chapter 2, “E-Service functions and features.”

An e-mail message is sent to your e-mail address to confirm receipt of the service request

Guest user

If you are a guest user of the application, you can use any one of the following options to create a service request:

- Select the **Create New Service Request** option on the menu of the E-Service home page.
- Select the **Create a Service Request** link on the Troubleshooting page.

The user can now access the Create Service Request page:

Figure 3-11 Create Service Request page

- **Product Category:**
Select the product category. You can view the list of product categories based on the visibility defined for you by the administrator.

If you have accessed this page by using the **Create Service Request** link on the Troubleshooting page, the value in this field appears by default based on the product category you selected to search for the troubleshooting tips.

- **Product:** Select the product that is specific to the product category. You can view the list of product categories based on the visibility defined for you by the administrator.

If you have accessed this page by using the **Create Service Request** link on the Troubleshooting page, the value in this field appears by default based on the product category you selected to search for the troubleshooting tips.

- **Troubleshooting:** Use the link to view the troubleshooting tree related to the product category and product you have selected.
- **Question Category:**
Select the category to which your question belongs.
- **Subject:**
Enter the subject of the service request. A value in this field is mandatory. You cannot submit a service request without specifying a subject.

- **Problem Description:**

Enter a detailed description of the problem. A value in this field is mandatory. You cannot submit a service request without entering the problem description.

In addition to these details, you can specify the advance details, which include the following:

- **Problem Code:**

Select the problem code. A value in this field is mandatory. Click **Clear** to remove the value you have selected.

- **E-mail:**

Enter your e-mail address. A system-generated personal identification number (PIN) is sent by e-mail. You must use e-mail and the PIN to identify yourself the next time you access the application to track the service request. Click **Submit** to add the contact information. If the Personal Identification Number (PIN) is already assigned, the user does not have to enter the contact information.

- Click **Submit** to send the service request to the service provider.
- Click **Close** to go back to the E-Service home page.

- Click **Submit** to view the **Thank You** page.

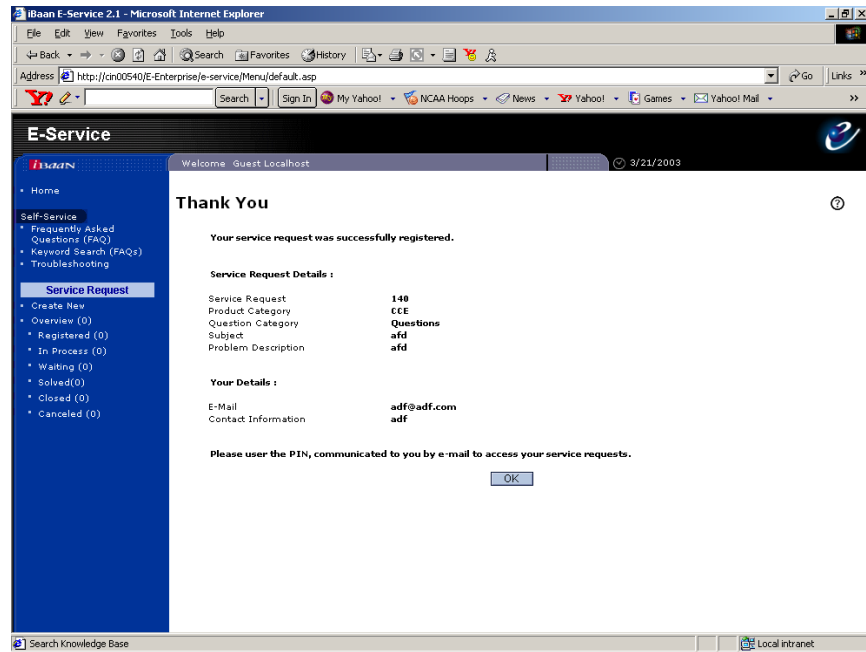


Figure 3-12 Thank You page

This page provides you with the following details:

Service Request Details:

- Service Request:
- Product category
- Question category
- Subject
- Problem Description

Your Details:

- E-Mail
- Contact Information

Click **OK** on this page to go back to the Your Requests page, which provides an overview of all the service requests you have created.

An e-mail message is sent to your e-mail address to confirm receipt of the service request.

E-Service integrated with Baan IVc4

This section describes the procedure that you must follow to create a service request if E-Service is integrated with Baan IVc4 in the back end.

You can create a service request using either the **Create New** option on the menu or home page, by using the **Create Service Request** link in the Troubleshooting page.

You must access the Create Service Request page to create a service request.

Registered user

You must be a registered user of the application to utilize the functions available in E-Service integrated with iBaan ERP in the back end.

Figure 3-13 Create Service Request page

Enter the following details on this page:

- **Product Category:**
Select the product category. You can view the list of product categories based on the visibility defined for you by the administrator.

If you access this page by using the **Create Service Request** link on the Troubleshooting page, the value in this field appears by default based on the product category you have selected to search for the troubleshooting tips.

- **Product:**

Select the product that is specific to the product category. You can view the list of product categories based on the visibility defined for you by the administrator.

If you access this page by using the **Create Service Request** link on the Troubleshooting page, the value in this field appears by default based on the product category you have selected to search for the troubleshooting tips.

- **Troubleshooting:**

Use the link to view the troubleshooting tree related to the product category and product you have selected.

- **Question Category:**

Select the category to which your question belongs.

- **Subject:**

Enter the subject of the service request. A value in this field is mandatory. You cannot submit a service request without specifying a subject.

- **Problem Description:**

Enter a detailed description of the problem. A value in this field is mandatory. You cannot submit a service request without entering the problem description.

In addition to these details, you must specify the advance details, which include the following:

- **Site:**

Select the site. Click **Clear** to remove the value you have selected.

- **Installation:**

Select or enter the installation. If you manually enter the installation number, click **Verify** to validate the value you have entered. If the installation number you have entered does not exist, an error message appears when you try to validate the installation number. Click **Clear** to remove the value you have selected.

- **Problem Priority:**

Select the problem priority. Click **Clear** to remove the value you have selected.

- **Reference:**

Enter the text that can be used to provide reference to the service provider.

- **Preferred Start Date:**
Specify the end user's preferred start date for on-site visit.
- **Request for Onsite Visit:**
Select either **Yes** or **No** to determine whether you require onsite visit by a service personnel to solve your problem.
- Click **Submit** to send the service request to the service provider.
- Click **Attachments** to add attachments to the service request. The procedure you must use to add attachments to the service request is described in the section "E-Service as a stand-alone application," in Chapter 2, "E-Service functions and features."
- Click **Close** to go back to the E-Service home page.

When you click **Submit**, the Thank you page appears, which provides the following details:

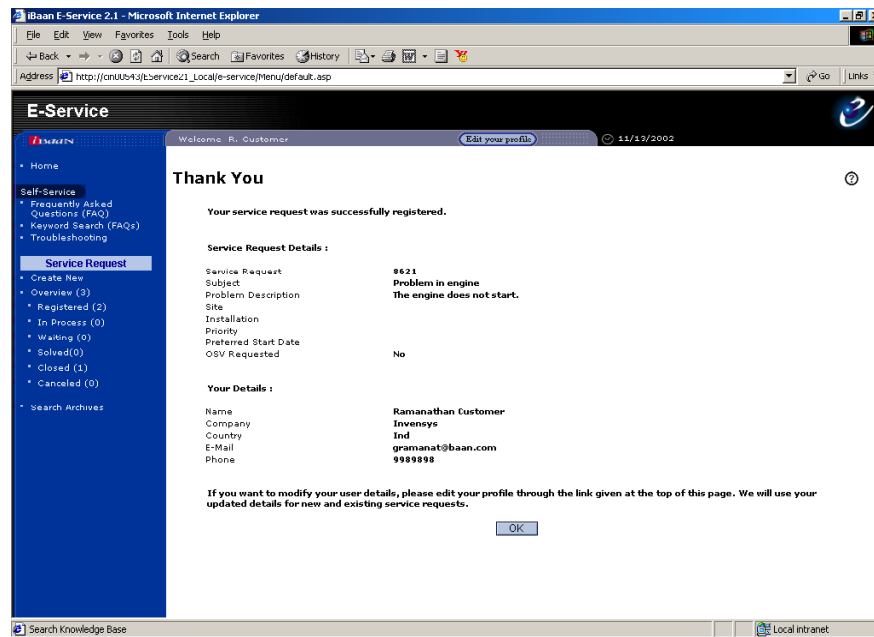


Figure 3-14 Thank You page

View the following details on this page:

Service Request Details:

- Service Request
- Subject
- Problem Description
- Site
- Installation
- Problem Code
- Priority
- Preferred Start Date
- OSV Requested

Your Details:

- Name
- Company
- E-mail

Click **OK** to go back to the Your Requests page, which provides an overview of all the service requests you have created.

Use the option provided on the Thank You page to edit your profile. For more information about the details you can modify in the Edit your Profile page, refer to “Logon page,” in Chapter 2, “E-Service functions and features.”

An e-mail message is sent to your e-mail address to confirm receipt of the service request.

Guest user

If the user is a guest user, the procedure used to create a service request is similar to that of guest user using the application in stand-alone mode.

For more details related to the procedure the guest user must use to create a service request, refer to “Guest user,” in Chapter 2, “E-Service features and functions.”

Track service request

Users can track the service request based on the request’s status. The procedure used to track the service request is the same, irrespective of whether you use E-Service as a stand-alone application, or integrated with iBaan ERP5.0c or Baan IVc4.

A service request can have the following status:

- **Registered:**
When you submit a service request, the request's status is Registered.
- **In process:**
When the service provider starts to work on the service request, the status of the service request is In Process.
- **Waiting:**
If the service provider requires some clarification from the user with regard to the problem specified in the service request, the status of the service request will be shown as Waiting.
- **Solved:**
After the service provider answers the problem of the user, the service request has the status Solved.
- **Closed:**
If the customer is satisfied with the solution that the service provider offers, the service request is Closed. In addition, the service provider can close the service request in case the user who has created the service request does not send acceptance for the solution provided within a specific duration.
- **Cancelled:**
Once logged, a service request can be Cancelled either by the user or by the service provider. However, only the user can cancel the service request if the status is Registered.

The following sections describe the various statuses of the service request.

Overview

Use the **Overview** option on the menu to view all the service requests you have created.

Registered user

If you are a registered user of the application, you can click **Overview** to view all the service requests you have created, irrespective of their status, on the Your Requests page.

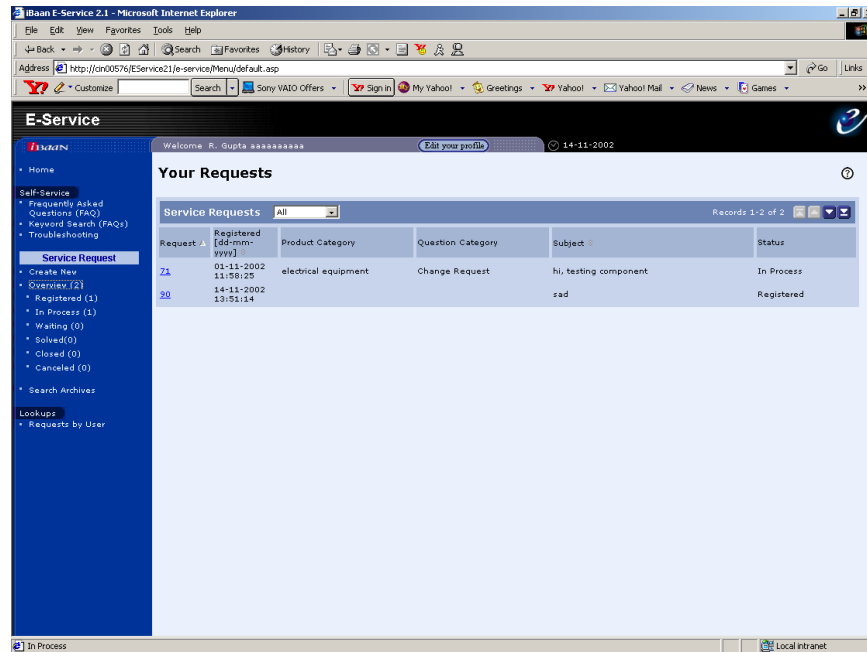


Figure 3-15 Your Requests page

This page displays the following details related to the service request:

- **Request:**
The system-generated service request number appears on this page. Use the link provided for the request number to view the service request details.
- **Registered:**
The date and time when the service request is registered appears on this page.
- **Product Category:**
The product category to which the service request belongs.
- **Question Category:**
The question category to which the service request belongs.
- **Subject:**
The subject specified in the service request appears in this field.

- **Status:**

The status of the service request.

Use the filters available on this page to sort the service requests based on their status. If you select **All**, you can view all the service requests irrespective of the requests' status. However, if you select a specific status, you can view only the service requests with the specific status.

Guest user

If you are a guest user, you must enter your e-mail address and the system-generated PIN number that is allotted to you on the Personal Information page.

- Click the **Overview** option on the menu to access the Personal Information page:

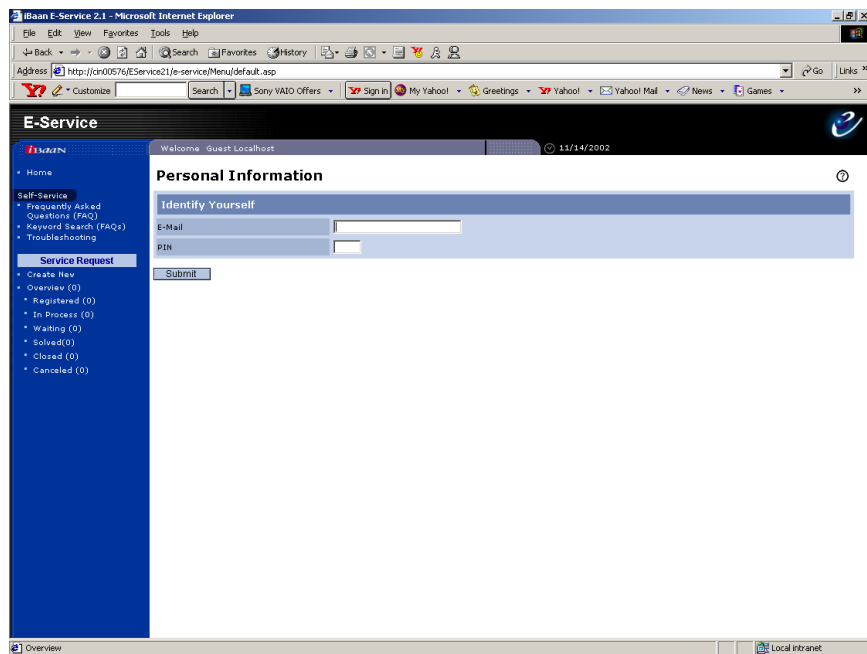


Figure 3-16 Personal Identification page

- **E-Mail:**

Enter the e-mail address you entered to create a service request.

- **PIN:**

Enter the personal identification number that you received by mail to the e-mail address you entered previously.

- Click **Submit** to access the Your Requests page. You can use the Your Requests page to view the service requests. Based on the filter you select to sort the service requests based on their status, either all or some of the service requests appear on this page.

Service request details

If you click the hyperlink provided for the service request number in the Your Requests page, you can access the Service Request Details page.

Based on the status of the service request, the following overview pages appear:

Registered

You can view the following details related to a service request with the status Registered.

The screenshot shows the 'Registered Service Request' details page for request number 125. The page is titled 'Registered Service Request '125''. The details section includes the following information:

- Product Category:** Cars
- Product:** Ford Ikon
- Question Category:**
- Subject:** problem in starting bike
- Problem Description:** Problem Description : 3/19/2003 9:40:46 PM when trying to start in cold, it gives problem
- Attachments:** attach.txt

Below the details, there is a section for 'Addition to Service Request' with a text input field and Attachments (clarification.txt, reopen.txt). At the bottom, there are buttons for Submit, Cancel Request, Attachments, and Close.

Figure 3-17 Registered Service Request Details page

You can view the following details in the Service Request details page.

- Product Category:**
The product category to which the service request belongs.

- **Product:**
The product that belongs to the specific product category.
- **Question Category:**
The question category to which the service request belongs.
- **Subject:**
The subject specified in the service request appears in this field.
- **Problem Description:**
The detailed description of the problem specified in the service request.
- **Addition:**
You can add comments to the service request in this field. Only the user who created the service request can specify the additions.

Use the options available on this page to do the following:

- **Submit:**
Click **Submit** to re-send the service request with the additions.
- **Cancel Request:**
Use this option to cancel the service request. Only the user who created the service can cancel the request until the status of the service request is In Process. Subsequently, only the service provider can cancel the service request.
- **Attachments:**
Use this option to add the attachments. The procedure used to add the attachments is described in the previous section in this chapter. To add an attachment to the service request, the user must be a registered user of the application. A guest user cannot add attachments to the service request.
- **Close:**
Click **Close** to go back to the Your Requests page.

If E-Service is integrated with Baan IVc4 in the back end, you can view the following advanced details:

- **Site:**
View the site code.
- **Installation:**
View the installation code.
- **Problem Code:**
View the problem code. Based on the parameters defined by the administrator for back-end integrations, you can access this field to specify the problem code.

- **Problem Priority:**
View the problem priority code.
- **Reference:**
View the text that can be used to provide reference to the service provider.
- **Preferred Start Date:**
View the end user's preferred start date for on-site visit.
- **Request for Onsite Visit:** View the option that is used to determine if the user requires an on-site visit from a service engineer to solve your problem.

If E-Service is integrated with iBaan 5.0c in the back end, you can view the following advanced details:

- **Site:**
View the site code.
- **Installation:**
View the installation code.
- **Installation Number:**
View the installation number, which appears by default based on the installation code you have selected.
- **Serial Number:**
View the serial number, which appears by default based on the installation code you have selected.
- **Problem Code:**
View the problem code. Based on the parameters defined by the administrator for back-end integrations, you can access this field to specify the problem code.
- **Problem Priority:**
View the problem priority code.
- **Reference:**
View the text, which you can use to provide reference to the service provider.

In Process

You can view the following details for a service request with the status In Process:

The screenshot shows a web browser window titled "iBaan E-Service 2.1 - Microsoft Internet Explorer". The address bar shows the URL "http://cn00540/E-Enterprise/e-service/Menu/default.asp". The browser's search bar contains "Search". The page header shows "E-Service" and a welcome message "Welcome K. Ranganathan" with a date "3/21/2003". The main content area is titled "Registered Service Request '119'". It contains a "Details" section with the following information:

Product Category	Bikes
Product	Pulsar
Question Category	Questions
Subject	Keyboard
Problem Description	Problem Description : 3/18/2003 1:53:17 PM Addition to Service Request Problem Description : 3/18/2003 1:49:04 PM
Call ID	000000053

Below the details section, there is a button "+ Open Advanced Details". Underneath that, there is a section titled "Addition to Service Request" with a text input field and a button "Addition". At the bottom of the form, there are buttons "Submit", "Cancel Request", "Attachments", and "Close".

Figure 3-18 Service Request Details page

You can view the following details on the Service Request details page:

- **Product Category:**
The product category to which the service request belongs.
- **Product:**
The product that belongs to the specific product category.
- **Question Category:**
The question category to which the service request belongs.
- **Subject:**
The subject specified in the service request appears in this field.
- **Problem Description:**
The detailed description of the problem specified in the service request.

- **Link:**
View the link provided to a Web site.
- **Addition:** You can add comments to the service request in this field. Only the user who has created the service request can specify the additions.

Use the options available on this page to do the following:

- **Submit:**
Click to re-send the service request with the additions.
- **Attachments:**
Use this option to add the attachments. The procedure used to add the attachments is described in the previous sections of this document. To add an attachment to the service request, the user must be a registered user of the application. A guest user cannot add attachments to the service request.
- **Close:**
Click to go back to the Your Requests page.
- **Cancel Request:**
Click to cancel the service request.

You can view the Thank You page stating that the service request is cancelled.

Based on the mode of application used to create a service request, you can view the service request details on the Thank You page.

If E-Service is integrated with Baan IVc4 in the back end, you can view the following advanced details:

- **Site:**
View the site code.
- **Installation:**
View the installation code.
- **Problem Code:**
View the problem code. Based on the parameters defined by the administrator for back-end integrations, you can access this field to specify the problem code.
- **Problem Priority:**
View the problem priority code.
- **Reference:**
View the text that you can use to provide reference to the service provider.
- **Preferred Start Date:**
View the end user's preferred start date for on-site visit.

- **Request for Onsite Visit:** View the option that you can use to determine if the user requires an on-site visit by a service person to solve your problem.

If E-Service is integrated with iBaan 5.0c in the back end, you can view the following advanced details:

- **Site:**
View the site code.
- **Installation:**
View the installation code.
- **Installation Number:**
View the installation number that appears by default based on the installation code you selected.
- **Serial Number:**
View the serial number that appears by default based on the installation code you selected.
- **Problem Code:**
View the problem code. Based on the parameters defined by the administrator for back-end integrations, you can access this field to specify the problem code.
- **Problem Priority:** View the problem priority code.
- **Reference:** View the text that you can use to provide reference to the service provider.

Waiting

You can view the following details for a service request with the status Waiting:

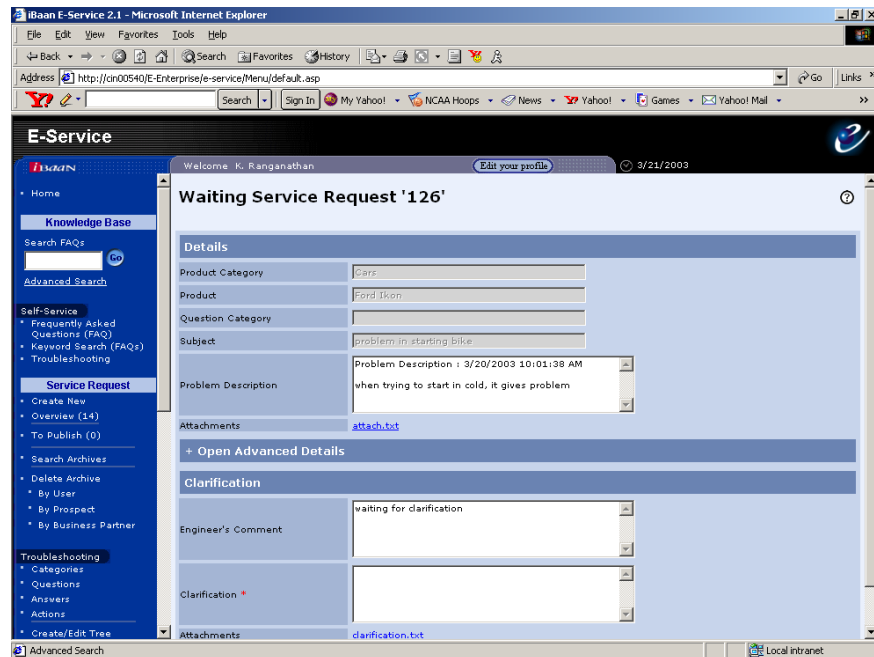


Figure 3-19 Waiting Service Request details page

On the Service Request details page, you can view the following details:

- **Product Category:**
The product category to which the service request belongs.
- **Product:**
The product that belongs to the specific product category.
- **Question Category:**
The question category to which the service request belongs.
- **Subject:**
The subject specified in the service request appears in this field.
- **Problem Description:**
The detailed description of the problem specified in the service request.
- **Engineers Comments:**
The service providers' comments or query appears in this field.

- **Clarification:** Enter the clarification based on the engineer's comments. A value in this field is mandatory to submit the service request.

Use the options available on this page to do the following:

- **Submit:** Click **Submit** to re-send the service request with the additions.
- **Attachments:** Use this option to add attachments to the service request.
- **Close:** Use this option to go back to the Your Requests page.
- **Q & A:** Use this option to view the question and answer log on the Problem and Solutions page:

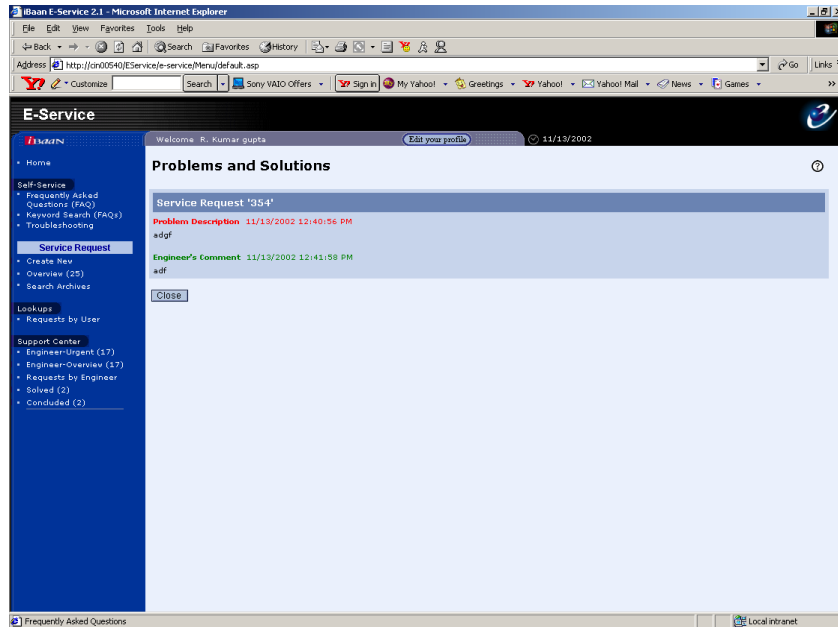


Figure 3-20 Q and A Log page

This page displays the problem and all the solutions related to the problem.

Click **Close** to go back to the Your Requests page.

If E-Service is integrated with Baan IVc4 in the back end, you can view the following advanced details:

- **Site:**
View the site code.
- **Installation:**
View the installation code.

- **Problem Code:**
View the problem code. Based on the parameters defined by the administrator for back-end integrations, you can access this field to specify the problem code.
- **Problem Priority:**
View the problem priority code.
- **Reference:**
View the text, which you can use to provide reference to the service provider.
- **Preferred Start Date:**
View the end user's preferred start date for on-site visit.
- **Request for Onsite Visit:**
View the option, which you can use to determine whether the user requires an on-site visit by a service engineer to solve your problem.

If E-Service is integrated with iBaan 5.0c in the back end, you can view the following advanced details:

- **Site:**
View the site code.
- **Installation:**
View the installation code.
- **Installation Number:**
View the installation number that appears by default based on the installation code you have selected.
- **Serial Number:**
View the serial number that appears by default based on the installation code you have selected.
- **Problem Code:**
View the problem code. Based on the parameters defined by the administrator for back-end integrations, you can access this field to specify the problem code.
- **Problem Priority:**
View the problem priority code.
- **Reference:**
View the text, which you can use to provide reference to the service provider.

Solved Service Request

You can view the following details related to a service request with the status Solved.

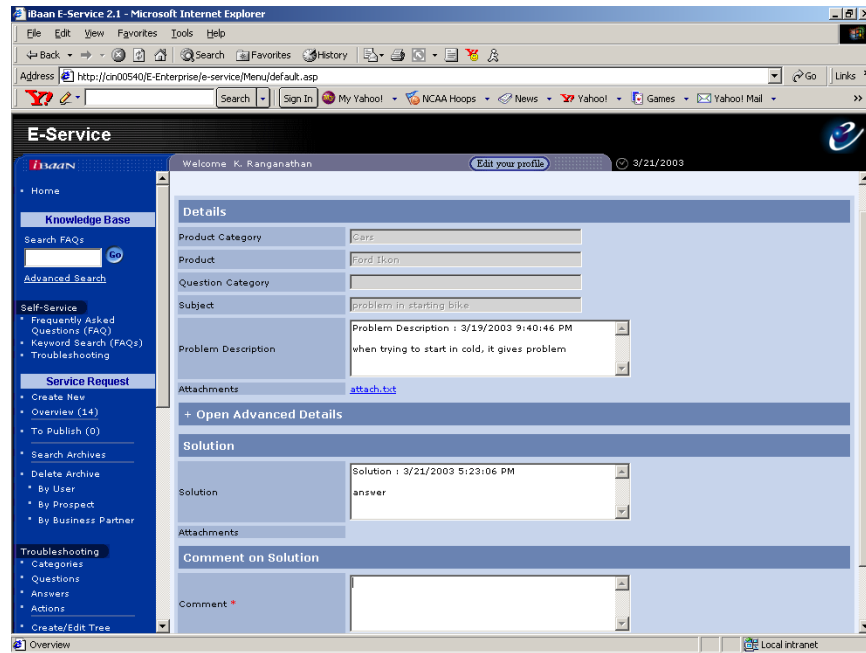


Figure 3-21 Solved Service Request page

- **Product Category:**
The product category to which the service request belongs.
- **Product:**
The product that belongs to the specific product category.
- **Question Category:**
The question category to which the service request belongs.
- **Subject:** The subject specified in the service request appears in this field.
- **Problem Description:**
The detailed description of the problem specified in the service request.

You can view the following details related to a solution:

- **Solution:**
The detailed solution.

- **Link:**
The link provided to a Web site.
- **Attachments:**
The attachments provided by the service provider to the service request.

The user who creates a service request can add a comment to the solution.

- **Comment:**
Enter the comment related to the service request.
- **Attachments:**
View the attachments linked to the service request.

This page provides the user with the following options:

- **Accept:**
Click to accept the solution provided to the service request.
- **Reopen:**
Click if you are not satisfied with the solution provided in the service request.
- **Attachments:**
Click to add attachments to the service request.
- **Close:**
Click to go to the Service Request Overview page.
- **Q & A:**
Click to view the details related to the problem and the solution specified in the service request.

If E-Service is integrated with Baan IVc4 in the back end, you can view the following advanced details:

- **Site:**
View the site code.
- **Installation:**
View the installation code.
- **Problem Code:**
View the problem code. Based on the parameters defined by the administrator for back-end integrations, you can access this field to specify the problem code.
- **Problem Priority:**
View the problem priority code.

- **Reference:**
View the text, which can be used to provide reference to the service provider.
- **Preferred Start Date:**
View the end user's preferred start date for an on-site visit.
- **Request for Onsite Visit:** View the option that is used to determine if the user requires an on-site visit by service personnel to solve your problem.

If E-Service is integrated with iBaan 5.0c in the back end, you can view the following advanced details:

- **Site:**
View the site code.
- **Installation:**
View the installation code.
- **Installation Number:**
The installation number appears by default based on the installation code you select in this field.
- **Serial Number:**
View the serial number appears by default based on the installation code you have selected.
- **Problem Code:**
View the problem code. Based on the parameters defined by the administrator for back-end integrations, you can access this field to specify the problem code.
- **Problem Priority:**
View the problem priority code.
- **Reference:**
View the text, which you can use to provide reference to the service provider.

Closed

You can view the following details related to the service request that is closed:



Figure 3-22 Closed Service Request Details page

On the Service Request details page, you can view the following details:

- **Product Category:**
The product category to which the service request belongs.
- **Product:**
The product that belongs to the specific product category.
- **Question Category:**
The question category to which the service request belongs.
- **Subject:**
The subject specified in the service request appears in this field.
- **Problem Description:**
The detailed description of the problem specified in the service request.
- **Answer:**
The service provider offers the solution to your problem specified in the service request.

Use the options available on this page to do the following:

- **Attachments:**
Use this option to add attachments to the service request. The procedure used to add the attachments is described in the previous section.
- **Close:**
Use this option to go back to the Your Requests page.
- **Q & A:**
Use this option to view the question and answers log in the Problems and Solutions page.

Cancel request

An external user of the application can cancel the service request if the status of the service request is Registered or Assigned.

If the user cancels the service request, the service request is no longer valid.

You can view the following details related to a service request with the Canceled status:

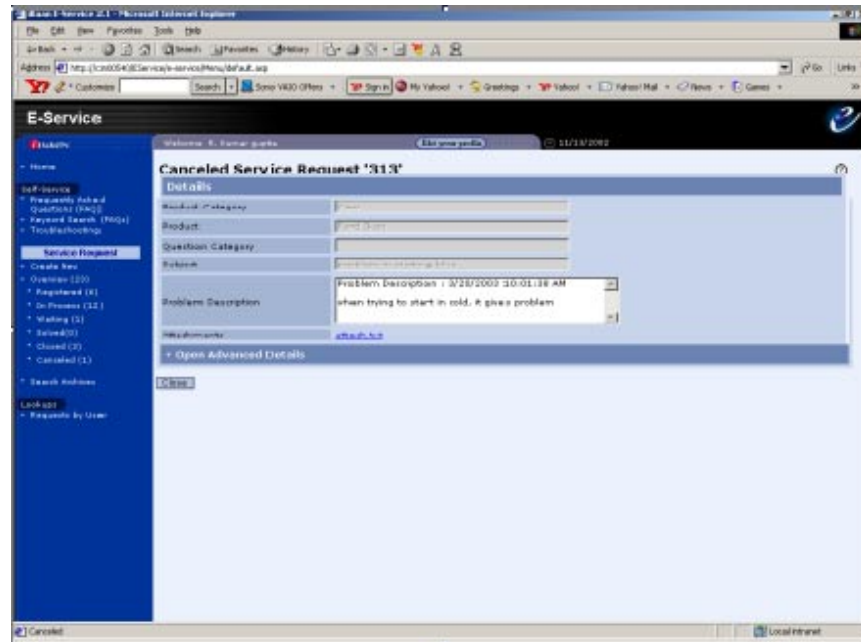


Figure 3-23 Cancelled Service Request details page

Based on the mode of application you have used to create a service request, you can view the service request details.

If you have used E-Service as a stand-alone application, you can view the following details:

- **Product Category:**
The product category in which the service request belongs.
- **Product:**
The product that belongs to the specific product category.
- **Question Category:**
The question category to which the service request belongs.
- **Subject:**
The subject specified in the service request appears in this field.
- **Problem Description:**
The detailed description of the problem specified in the service request.

If E-Service is integrated with Baan IVc4 in the back end, you can view the following advanced details:

- **Site:**
View the site code.
- **Installation:**
View the installation code.
- **Problem Code:**
View the problem code. Based on the parameters defined by the administrator for back-end integrations, you can access this field to specify the problem code.
- **Problem Priority:**
View the problem priority code.
- **Reference:**
View the text, which can be used to provide reference to the service provider.
- **Preferred Start Date:**
View the end user's preferred start date for an on-site visit.
- **Request for Onsite Visit:**
View the option, which can be used to determine if the user requires an on-site visit by service personnel to solve the problem.

If E-Service is integrated with iBaan 5.0c in the back end, you can view the following advanced details:

- **Site:**
View the site code.
- **Installation:**
View the installation code.
- **Installation Number:**
View the installation number, which appears by default based on the installation code you have selected.
- **Serial Number:**
View the serial number appears by default based on the installation code you have selected.
- **Problem Code:**
View the problem code. Based on the parameters defined by the administrator for back-end integrations, you can access this field to specify the problem code.
- **Problem Priority:**
View the problem priority code.
- **Reference:**
View the text, which can be used to provide reference to the service provider.

Search archives

Based on the time limit defined by the administrator, all the service requests with the status Closed and Canceled are archived. The user can use the **Search Archive** option on the menu to access the Archive Service Request Search page:

Figure 3-24 Search Archives page

This page contains the following fields, based on which the user can search the archives:

- **Service Request ID:**
Enter the system-generated service request ID in this field. You must enter only numeric values in this field.
- **Product Category:**
Enter the category to which the product belongs.
- **Question Category:**
Enter the category to which the question belongs.

- **Status:**
Select one of the options:
 - **All archived:**
If you select this option, all the archived service requests appear.
 - **Closed:**
If you select this option, all the service requests with the Closed status appear.
 - **Cancelled:**
If you select this option, all the service requests with the Cancelled status appear.
- **Date From:**
Enter the date in DD/MM/YYYY format. All the service requests that are archived after the specified date are displayed.
- **Date To:**
Enter the date in DD/MM/YYYY format. All the service requests that are archived up to the specified date are displayed.
- **Keywords:**
Enter the keyword, which is used to search for the archived service requests. You can enter more than one keyword to search the archives.
- **Search Type:**
If you enter more than one keyword in the keywords field, select either the **OR**, or **AND**, or **exact Phrase** option to determine the combination in which the keywords must be used to search the archives.

Specify either one or all the parameters used to search the archives. Click **Search** to view the Archive Service Request Search results page.

Archive Service Request Search Results

All the service requests that match the specific criteria appear on the same page:

The screenshot shows a web browser window displaying the 'Archive Service Request Search' page. The page has a left sidebar with navigation links like 'Home', 'Self-Service', 'Service Request', and 'Lookups'. The main content area is titled 'Archive Service Request Search' and contains a 'Criteria' section with input fields for 'Service Request ID', 'Product Category', 'Question Category', 'Status' (set to 'All Archived'), 'Date From', 'Date To', 'Keywords', and 'Search Type' (radio buttons for 'OR', 'AND', 'Exact Phrase'). A 'Search' button is below these fields. Below the search criteria is a table titled 'Service Requests' showing one record.

Service Request ID	Date	Product Category	Question Category	Subject	Status
72	11/1/2002 3:45:39 PM	electrical equipment	Change Request	hi	Canceled

Figure 3-25 Archive Service Request Search results page

Use this page to view the following details related to the archived service requests.

- **Service Request ID:** The unique code used to identify the service requests is displayed here. Use the hyperlink provided for the service request ID to view the service request details.
- **Date:** The date on which the service request is archived is displayed in this field.
- **Product Category:** The category to which the product specified in the service request belongs is displayed here.
- **Question Category:** The category to which the question specified in the service request belongs is displayed here.
- **Subject:** The subject specified by the user is displayed here.
- **Status:** The status of the service request in the archives is displayed in this field.

Based on the mode of application used to create a service request, you can view the details related to the cancelled service request.

If you use E-Service as a stand-alone application, you can view the following details:

- Product Category
- Question Category
- Subject
- Problem Description
- Attachments

If you use E-Service integrated with iBaan ERP5.0c in the back end, you can view additional details related to the following:

- Site
- Installation Number
- Serial Number
- Problem Code
- Problem Priority

If you use E-Service integrated with iBaan ERP4 in the back end, you can view additional details related to the following:

- Site
- Installation
- Problem Code
- Problem Priority
- Preferred Start Date
- Request for onsite visit
- Link Document

Click **Close** on the Cancelled Service Request details page to go back to the Archive Service Request Search page.

Service Request Lookups

The user must use the **Lookups** option on the menu to view the service requests created by all the other users related to the business partner to which the user belongs.

Requests by User

All the registered users of the application must be attached to a business partner. The administrator can attach any number of users for a specific business partner. Users can use this **Requests by User** option on the menu to view the service requests created by all users related to the business partner. For example: if ten users are related to a business partner, you can view the service requests created by all ten users. You can also use the filters provided on this page to view the service requests created by specific users.

Select the **Requests by User** option on the menu to access the Requests by User page:

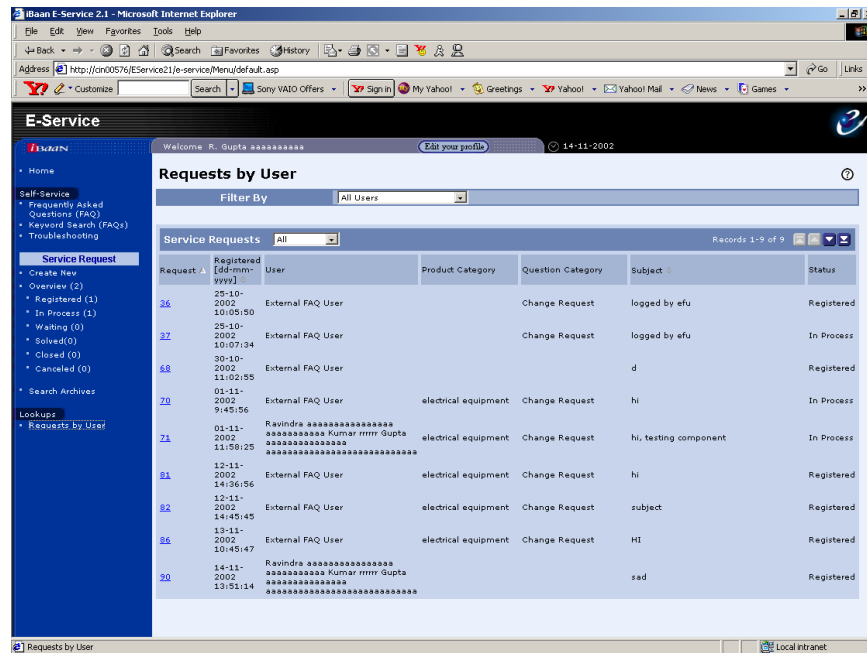


Figure 3-26 Requests by User page

This page provides the following details related to a service request:

- **Request:**
The service request number appears here. Use the hyperlink provided for the service request number to view the service request details.
- **Registered:**
The date and time when the service request was registered appears here.

- **User:**
The user ID of the user who created the service request appears in this field.
- **Product Category:**
In this field, you can view the category to which the product specified in the service request belongs.
- **Question Category:**
In this field, you can view the category to which the question specified in the service request belongs.
- **Subject:**
In this field, you can view the subject specified by the user.
- **Status:**
Use this field to view the service request status. A service request can have the following statuses:
 - Registered
 - In Process
 - Waiting
 - Solved
 - Canceled
 - Closed

For more details related to the service request status, refer to “Track Service Requests,” in Chapter 2, “E-Service features and functions.”

If you click on the hyperlink provided in the **Service Request Number** field, you can view the following details, based on the mode of application used to create the service request:

If E-Service is used as a stand-alone application, you can view the following details:

- Product Category
- Question Category
- Subject
- Problem Description

If E-Service is integrated with iBaan ERP 5.0c, you can view the following details:

- Product Category
- Question Category
- Subject
- Problem Description

In addition, you can also view the additional details related to the following:

- Site
- Installation
- Installation Number
- Serial Number
- Problem Code
- Problem Priority
- Reference

If E-Service is integrated with Baan IVc4, you can view the following details:

- Product Category
- Question Category
- Subject
- Problem Description

In addition, you can also view the additional details related to the following:

- Site
- Installation
- Problem Code
- Problem Priority
- Reference
- Preferred Start Date
- Request for Onsite Visit
- Field service details

4 Miscellaneous

Forgot your password

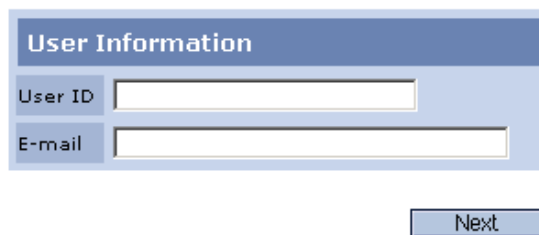
If you forget your password used to access the E-Service application, you can retrieve the password based on the secret question and secret answer you specified when you registered yourself as a new user using the **New** option on the E-Service Logon page. For more details related to the procedure to create a new user, refer to “Logon page,” in Chapter 2, “E-Service features and functions.”

To either retrieve the old password or create a new password, take the following steps:

- 1 Click the **Forgot your Password** link on the E-Service Logon page for registered users to access the Change Password (Step 1) page:

Change Password (Step 1)

Enter the user ID and e-Mail address so that the secret question can be retrieved.



User Information	
User ID	<input type="text"/>
E-mail	<input type="text"/>

Next

Figure 4-1 Change Password (Step 1) page

- 2 On this page, enter the following details:
 - **User ID:** Enter your user ID.
 - **E-Mail:** Enter your e-mail address.

- 3 Click **Next** to access the Change Password (Step 2) page:

Change Password (Step 2)

Enter the answer to the secret question and the new password.

User Information	
Secret Question	<input type="text" value="abcd"/>
Secret Answer	<input type="text"/>
New Password	<input type="text"/>
Verify Password	<input type="text"/>

Next

Figure 4-2 Change Password (Step 2) page

- 4 On this page, enter the following details:
- **Secret Answer:**
For the secret question, which appears in the **Secret Question** field, you must enter the corresponding secret answer in this field.
 - **New Password:**
Enter the new password.
 - **Verify Password:**
Re-enter the new password to confirm the new password.

- 5 Click **Next** to access the Change Password (Step 3) page:

Change Password (Step 3)

The password has been changed. Log on with the new password.

Next

Figure 4-3 Change Password (Step 3) page

- 6 Click **Next** to access the E-Service Logon page.

You can access this page only if the secret answer you have entered in Step 2 is correct.

You must now use the new password to access the E-Service application.

