iBaan E-Enterprise

E-Service 2.1 SP1 User's Guide for Internal Users

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Baan Development B.V.
P.O.Box 143
3770 AC Barneveld
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About this document

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

A user can be classified as either an internal user or an external user. 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, a customer, a prospect, or a guest user of the organization are all classified as external users. Users can access the application through the Internet and utilize the various functions and features of E-Service.

This document acts as a guide for internal users and describes the various user interfaces, functions, and features available to enable internal users to understand how to use the E-Service application.

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

This document is divided into the following chapters:

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

Chapter 2, "E-Service internal users," provides a detailed description of the various user roles that can be assigned to the internal users of the application.

Chapter 3, "Functions and features of E-Service," describes the various functions that are available to all the internal users of the application.

Chapter 4, "Internal users – stand-alone mode," describes the functions and features available to the internal users of the application when used in stand-alone mode.

Chapter 5, "Internal users - integrated with iBaan ERP 5.0c," describes the functions and features available to the internal users of the application, when E-Service is integrated with iBaan ERP 5.0c in the back end.

Chapter 6, "Internal users – Integrated with Baan IVc4," describes the functions and features available to the internal users of the application, when E-Service is integrated with Baan IVc4 in the back end.

Terms and definitions used in the document

Term	Definition
User	An individual who can access the E-Service application. The term user refers to either to the internal user or internal business partners of the company, such as suppliers, subcontractors, and so on, who use E-Service to offer the services over the Web.
Internal user	Individual who belongs to the enterprise that uses this product.
External user	Any user who is not an internal user.
Call center dispatcher	Appointed individual with provided privileges to dispatch service requests to call engineers.
Call center engineer	Appointed qualified individual to answer service requests.
Publisher	Appointed individual with privileges to review the answers to service requests and to decide whether or not the answer is useful to publish as an FAQ
Call center supervisor	Appointed individual who supervises the workflow of the call center. The supervisor uses the system to keep track of all actions, in particular the flow of a service request and workflow from the dispatchers, call engineers, and publishers.
Guest user	Users who are not registered in E-Common, but who are referred to as authorized users in E-Common.
Call agent	Appointed individual who registers service requests on behalf of the customer, prospect, or guest user.
Call center dispatcher	The user who manually assigns the service requests to the call center engineers.
Field service engineer	The engineer who visits the customer site to solve the problems.
Registered user	A user who is registered as a user in the E-Common and who may or may not be related to a business partner.
Service request	Service request is the functionality in E-Service, which the users can use to log all their queries.
Frequently asked questions (FAQs)	A functionality of E-Service that enables the user to get acquainted with general or product-related queries.

Attachments	The files or folders that are linked to a Frequently Asked Question or service request.
Troubleshooting	The functionality of E-Service that enables the user to browse through the problem solution tree of a product to arrive at a particular solution for a particular problem.
Support Center	Provides advanced help-desk functionality to E-Service users. Customers' queries are transferred from the call center to the support center.
Support center employee	Employees who work in a support center, who include the support center dispatcher, support center engineer, and support center supervisor.
IBaan ERP	The Baan Enterprise Resource Planning application, which is used to enhance the functionality of the E-Service application.

1 Introduction

In the current market, companies strive to provide better services to business partners to not only retain, but also to increase the existing clients base. In this market, organizations can use the iBaan E-Service application. Business partners can use the Web to access this application and try to find quick and efficient solutions to their problems.

You can use the E-Service application to do the following:

- FAQs:
  The users can search the FAQs database to find a solution to problems. The users can view a question and the related answer, based on a combination of the type of the product and the questions related to the product. The application assigns a system generated unique identification code to the FAQ, which the user can use, to search the FAQs database. The user can also search for the required FAQ on the basis of a keyword, that is present in the FAQ.
- Troubleshooting:
  The troubleshooting is an interactive tool, which enables the user to browse through 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 gives a solution based on the problem specified in the service request.

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

- Stand-alone mode:
  The application works as a stand-alone application.
- Integrated with iBaan ERP 5.0c:
  Companies that already use iBaan ERP 5.0c can integrate this version with E-Service 2.1.
- Integrated with Baan IVc4:
  Companies that already use Baan IVc4 can integrate with E-Service 2.1.

The following chapters describe the functions and features of E-Service as they are available to the internal users of the organization. The functions and features available to the internal users differ on the basis of the mode of the application.

2 E-Service internal users

Based on the user roles assigned by the administrator, the iBaan E-Service application can classify the internal user as follows:

- Call Center Dispatcher:
  If the **Automatic Dispatching of Service Requests** option is not enabled for the application, the dispatcher must manually assign the service requests to the call center engineer.
- Call Center Engineer:
  The call center engineer must provide a solution to the query specified in the service request.
- Call center supervisor:
  The call center supervisor can search for the service requests available in the escalation state and take corrective action. The supervisor can view the service request archives and delete the archives at regular intervals.
- Support Agent:
  A support agent can create a service request on behalf of a registered user or a guest user.
- Publisher:
  The publisher must edit and publish the service requests to the FAQs database.

If the application is integrated with iBaan ERP 5.0c, you can have the following additional roles assigned to the internal users:

- Support center dispatcher:
  If the **Automatic Dispatching of Service Requests** option is not enabled for the application, the dispatcher must manually assign the service requests to the support center engineer.
- Support center engineer:
  The support center engineer must provide a solution to the service request if the service request is transferred to the support center.

- Support center supervisor:
  The support center supervisor can search for the service requests in the support center queue in the escalation state and take corrective action. The supervisor can view the service request archives and delete the archives at regular intervals.

3 Functions and features - Internal users

This chapter describes the various functions and features of the application that are available to all internal users.

All internal users are registered users of the application. Some features are available to all registered users. This chapter describes the functions and features of the registered users of E-Service. This chapter also enables the users to understand the user interfaces in E-Service.

This chapter is divided into the following sections:

- E-Service Logon page and home page:
  This section describes the options available on the Logon page and the various panes on the E-Service home page.
- Frequently Asked Questions:
  This section introduces and describes the uses of Frequently Asked Questions. This section also describes the procedure that the user must use to locate the required FAQ.
- Troubleshooting:
  This section introduces and describes the procedure used to access the troubleshooting tips available in E-Service.
- Service request:
  This section introduces and describes the procedure used to create and track a service request in E-Service. This chapter is further subdivided into the following sections:
- Create service request:
  This section 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:
  This section 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, “Logon page,” describes the options available on the E-Service Logon page. The second section, “E-Service home page,” describes the various panes and functions available to the user on the home page.

Logon page

The Logon page, as shown in the following figure, is the first page that is available to the user in the E-Service application:

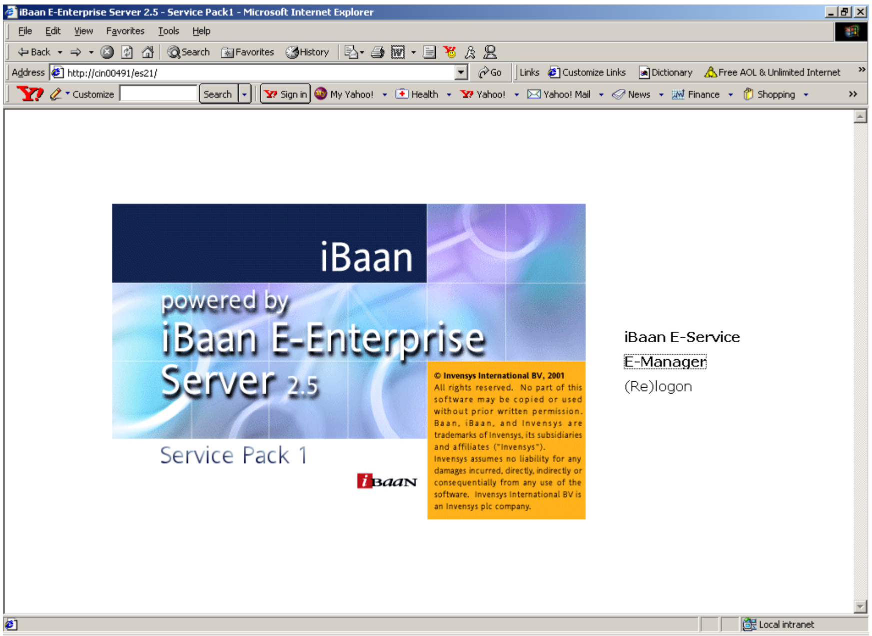

Figure 3-1 E-Service Logon page

This page contains the following options:

- **iBaan E-Service:**
  Use this option to access the E-Service home page. This option is available to all the users of the application.
- **E-Manager:**
  Use this option to access the various options available to set up the application. This option is available only to the administrator.

- **Re-logon:**
  The registered user is a user to whom a user ID and password is assigned by the administrator. The registered user must use this option to access the Logon page for registered users.

Figure 3-2 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.

You can also use the options available on this page to do the following:

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:

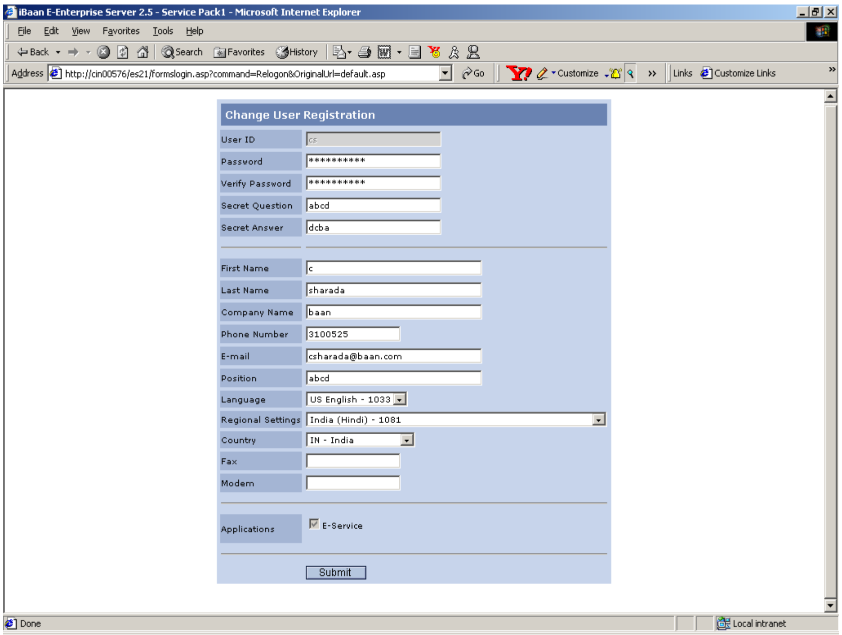

Figure 3-3 Change User Registration

This page contains the following data fields:

Fields	Description
User ID	The 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 once 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 is used 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 user's regional setting. You can modify the regional settings.
Country	The country to which the user belongs. 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 can 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 screen contains the following data fields:

Fields	Description
User ID	Enter the user ID that will be used by the user to access the application.
Password	Enter the password that is used to authenticate the user ID. A value in this field is mandatory.
Verify Password	Enter the modified password again 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 user's position 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 must be used by the user.
Country	Select the country to which the user belongs.

Fax	Enter the FAX number that is used by the user.
Modem	Enter the details related to the modem used to connect to the Internet.
Application	Select the 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.

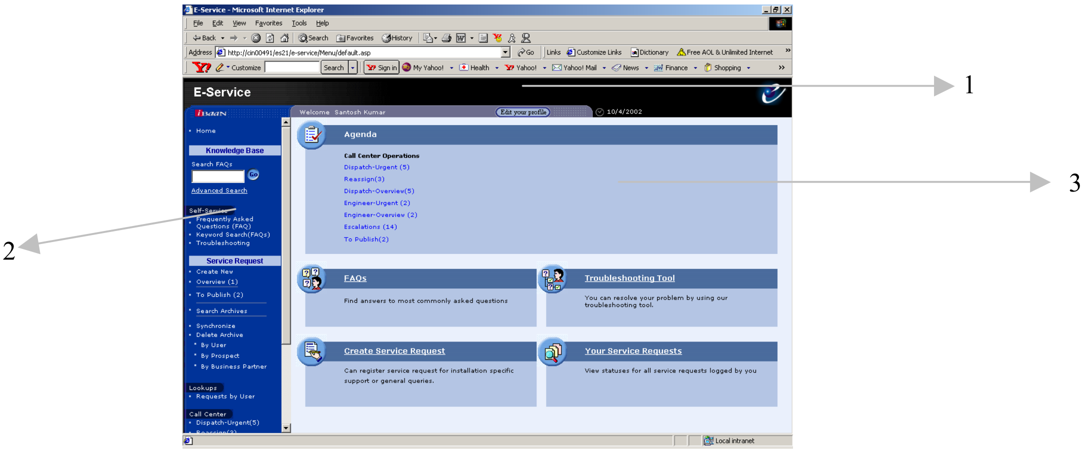

Figure 3-4 E-Service home page for call center employees

The E-Service home page contains 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 the **E-Service** icon in this pane to access the E-Service Logon page. You can use this option to log in as a different user.

2 **Service menu:**
To access the various functions of the E-service application, the user can select the required option on the E-Service menu.

Knowledge Base:
Use the options available in the Knowledge Base section to do the following:

- **Search FAQs**:
  Enter the keyword or a set of keywords in the **Search FAQs** field and click **Go** to locate the required FAQ in the knowledge base.
- **Advanced Search:**
  Use the **Advanced Search** option to access the advanced search on the Knowledge Base page to locate the required FAQ on the basis of the specified search criteria.
- **Self Service:**
  Use the options available in the **Self Service** section to do the following:
  - **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.
- **Service Request**:
  Use the options available on the E-Service menu to create and track service requests.

  The following sections describe in detail all the options available on the E-Service menu.

3 **Display pane**:
The options selected on E-Service menu appear in this pane.

On the home page, this pane provides the user with the following options, which are similar to the options available on the E-Service menu:

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

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

4 **Home Option:**
Use the home option to access the E-Service home page from anywhere in the application.

Frequently Asked Questions

Frequently Asked Questions enable the user to get acquainted with some common queries that can arise. The queries can be either generic or specific to a particular product. FAQs provide the user with general and product-related information.

Based on the type of the problem you are faced with in a given scenario, specify the product category and the question category to locate a Frequently Asked Question and answer, which might help you solve your problem.

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

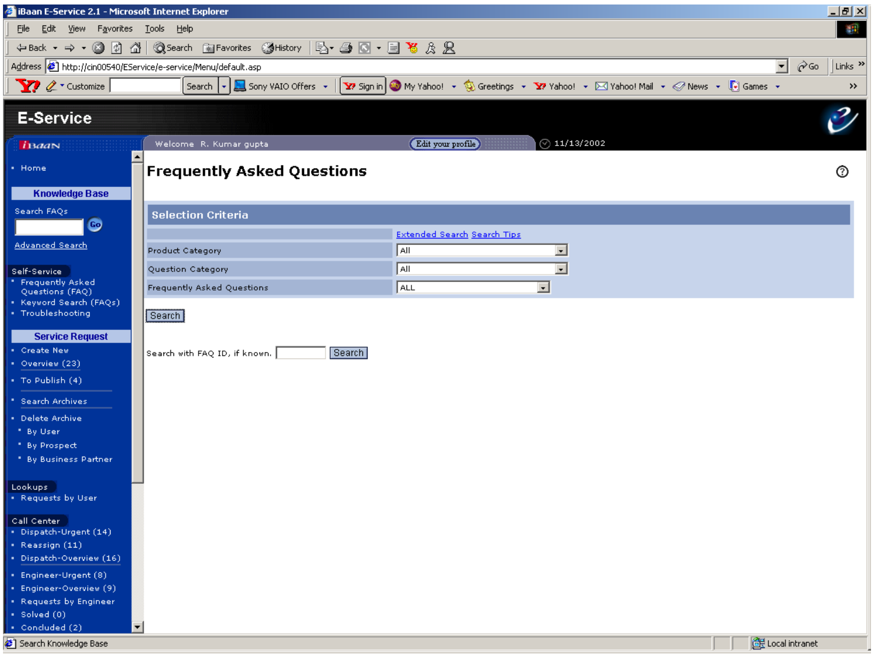

Figure 3-5 Frequently Asked Questions

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

- **Product Category:**
  Select one of the product category 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.

- **Frequently Asked Questions:**
  Select one of the options on the basis of which you must search for the Frequently Asked Questions.
  - **All:** Select this option to search for all the Frequently Asked Questions.
  - **In Change Notification List:** Select this option to search for FAQs in the change notification list. An e-mail notification must be sent to the users in regard to any changes in the content of the FAQs that are on the change notification list.
  - **Not in Change Notification List:** Select this option to search for the FAQs that are not on the change notification list. Changes in the content of the FAQs do not have to be informed to the users.

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

The search results appear on the same page:

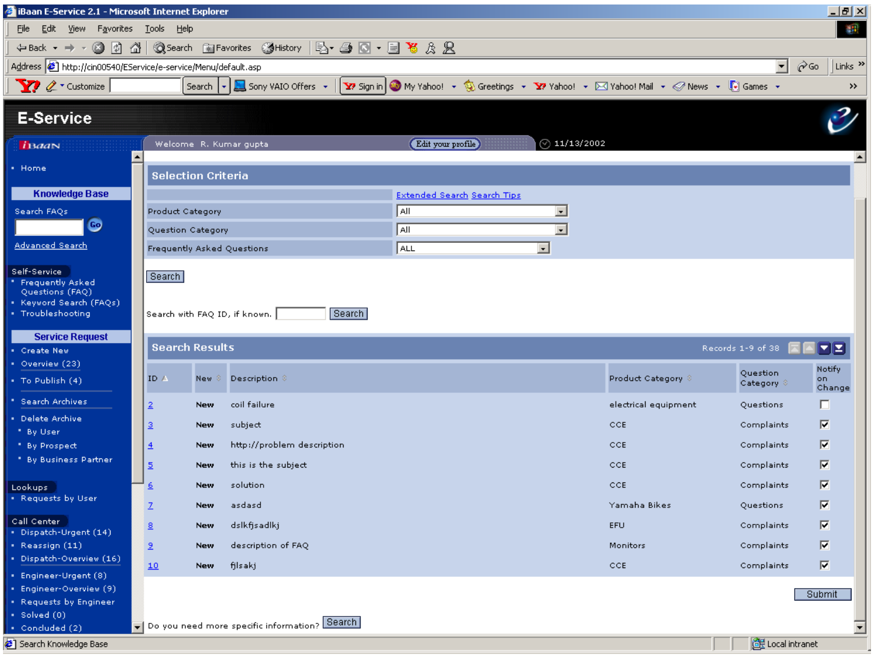

Figure 3-6 FAQs search results

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 on this page.
- **Question Category:**
  View the question category of the FAQ.
- **Notify on Change:**
  Select this check box to receive an e-mail notification that informs you about the change in the FAQ. For more details, refer to the following section, "Changed FAQs notification."

Changed FAQs notification

E-Service enables users to be informed by e-mail about changes in the FAQs.

To receive the e-mail notification, the user must do the following:

1. Select the **Frequently Asked Questions** option on the E-service menu.

The Frequently Asked Questions page opens.

2. On the Frequently Asked Questions page, select the product category or question category or the frequently asked questions category to search for the required FAQ.

The search results with a list of the FAQs that meet the selection criteria appear on the same page:

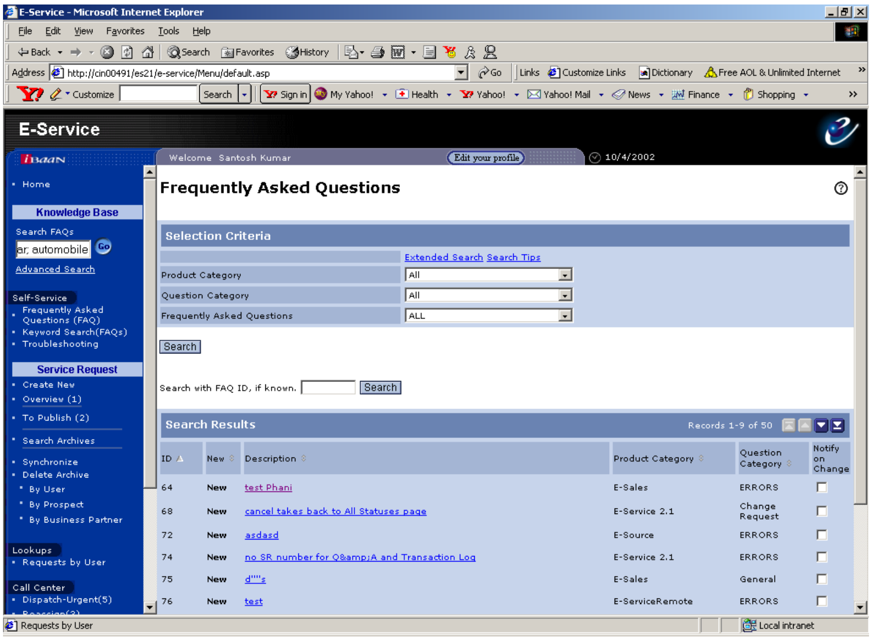

Figure 3-7 FAQ page, search results

You can view the following details related to the FAQs in the search results list.

- **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 on this page.
- **Question Category:**
  View the question category of the FAQ.

- **Notify on Change:**
  Select this check box to receive an e-mail notification that informs you of the change in the FAQ. Click **Submit** to access the Confirm FAQs for Notification/Stop Notification page:

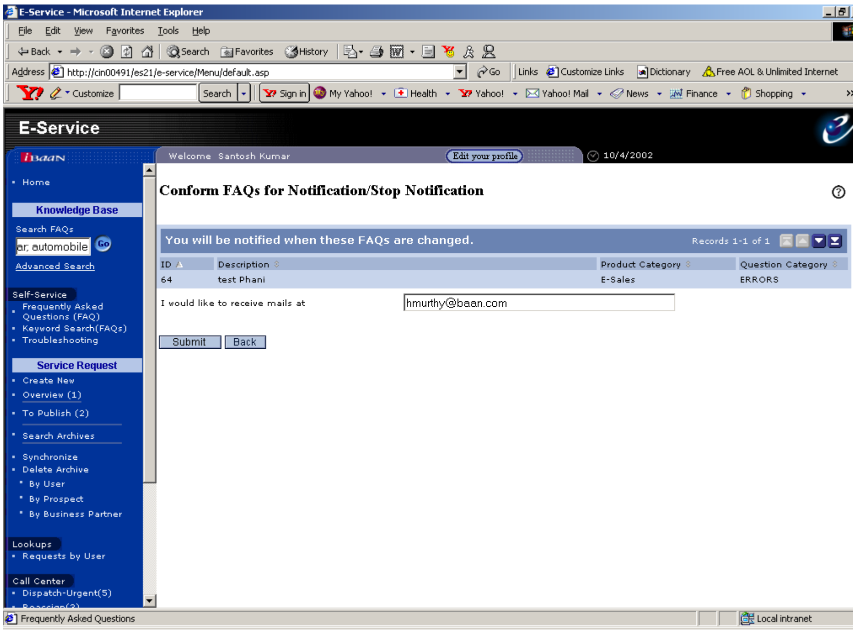

Figure 3-8 Confirm FAQs for Notification/Stop Notification page

You can view a list of all the FAQs for which you must either receive the notification or stop the notification.

To receive the notification, take the following steps:

1 Enter in the **I Would Like to Receive Mail At** field the e-mail address to which the notifications must be sent.

2 Click **Submit** to receive the e-mail notification.

3 Click **Back** to go to the Frequently Asked Questions page to modify the list of FAQs for which you must receive the notification.

To stop the e-mail notification, take the following steps:

1 Select the **Frequently Asked Questions** option on the E-service menu.

You now access the Frequently Asked Questions page.

2 Select on the Frequently Asked Questions page the product category or question category or the Frequently Asked Questions category to search for the required FAQ.

The search results with a list of the FAQs that meet the selection criteria appear on the same page.

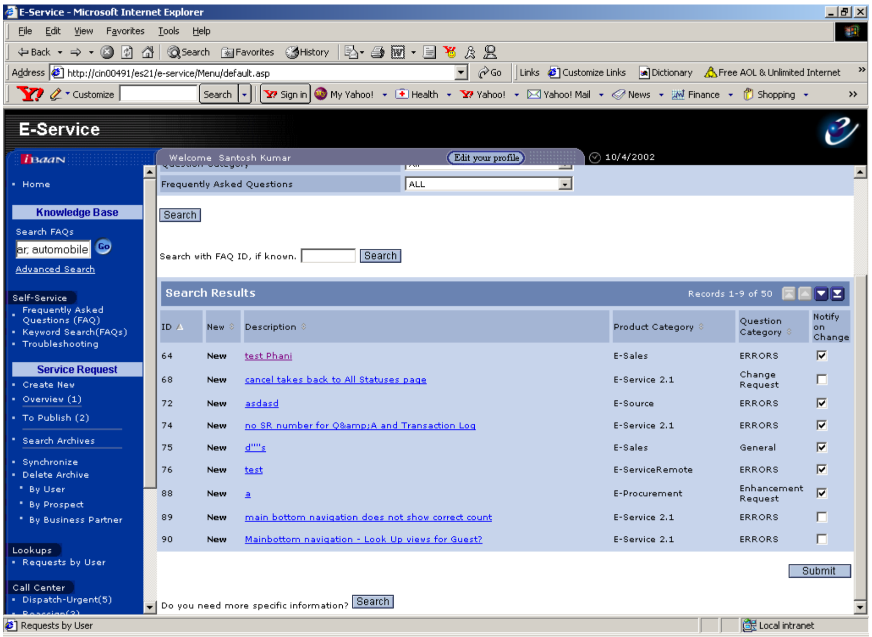

Figure 3-9 FAQ - search results

You can view the following details related to the FAQs in the search results list:

- **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 on this page.

- **Question Category:**
  View the question category of the FAQ.
- **Notify on Change:**
  If this check box is selected, an e-mail notification is sent to inform you about the change in the FAQ. If you do not want to receive the e-mail notification, you must clear the check box.

Click **Submit** to access the Confirm FAQs for Notification/Stop Notification page:

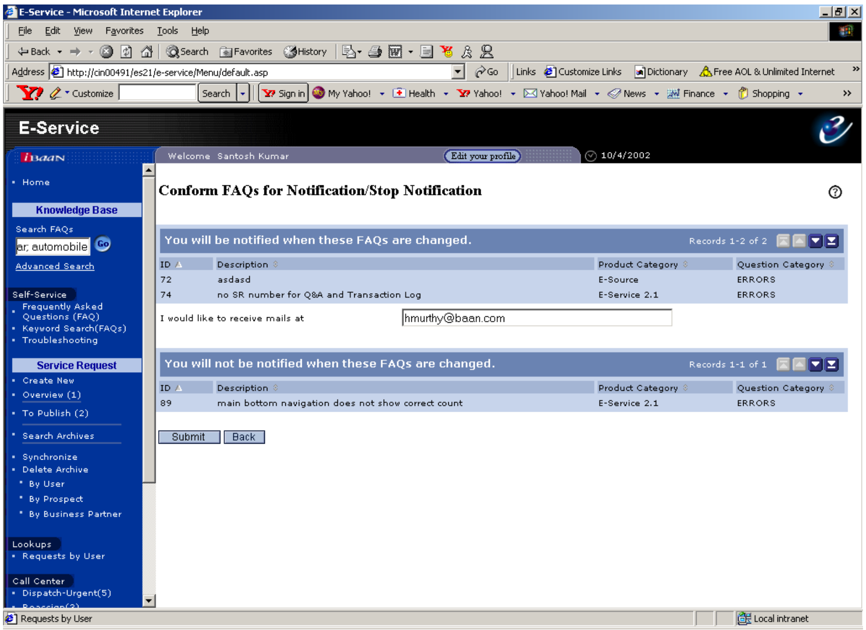

Figure 3-10 Confirm FAQs for Notification/Stop Notification page

You can view a list of all the FAQs for which you must either receive the notification or stop the notification.

Click **Submit** to stop the e-mail notification.

Click **Back** to go back to the Frequently Asked Questions page to modify the list of FAQs for which you must stop the e-mail notification.

FAQ details

To view the details of a Frequently Asked Question, take the following steps:

1 Select the **Frequently Asked Questions** option on the E-Service menu.

You now access the Frequently Asked Questions page.

2 Specify the search criteria on the Frequently Asked Questions page

A list of FAQs that meet the selection criteria appears as search results on the same page.

You can view the following details related to the FAQs in the search results list:

- **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 on this page.
- **Question Category:**
  View the question category of the FAQ.
- **Notify on Change:**
  If this check box is selected, an e-mail notification is sent to inform you about the change in the FAQ. If you do not want to receive the e-mail notification, you must clear this check box.

Click on the link available for the FAQ description on the Frequently Asked Questions page to view the FAQ details:

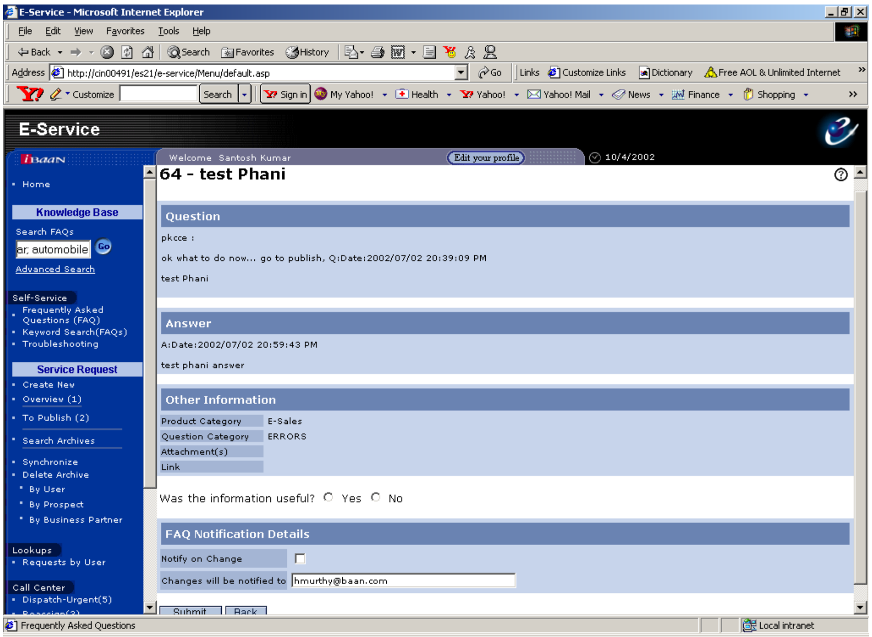

Figure 3-11 FAQ Details page

You can view the following details related to the FAQ:

- **Question:**
  The date, time, and question details appear.
- **Answer:**
  The date, time, and answer to the question.
- **Other Information:**
  Information related to the product category, question category, attachments, and links related to this FAQ appear.

Select the **Attachment** link to access the attachments. The attachment appears in a new window. The attachment can be in any file format.

- **Was the Information Useful?:**
  Select **Yes** if the FAQ details are useful or select **No** if the information provided in the FAQ details was not useful.

- **FAQ Notification Details**:
  Use the **FAQ Notifications** option to receive an e-mail notification that informs you about the modifications to the specified FAQ.

View or enter the following details related to FAQ notification:

- **Notify on Change**:
  If you select this check box, an e-mail message is sent to inform the user about changes in the content of the selected FAQ. To receive a notification, you must select this check box. To stop the e-mail notifications, clear the check box.
- **Changes will be Notified To**:
  The e-mail address to which the notification mail must be sent. To receive a notification, you must enter the e-mail address in this field.

Click **Submit** to receive or stop the e-mail notifications.

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 in detail the three ways to search the database.

Keyword Search

To use this option, you must use the **Search FAQs** option on the E-Service menu. Enter a keyword or a set of keywords in the **Search FAQs** field. Click **Go** to view the search results on the Search in FAQ Knowledge Base page:

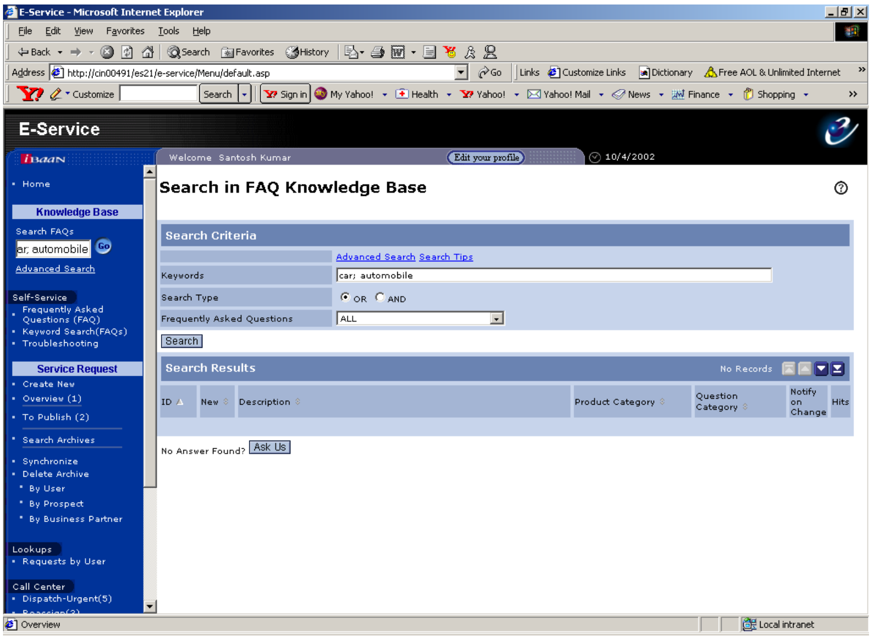

Figure 3-12 Search in FAQs Knowledge Base page

The FAQs that match the specific keywords appear as search results. If no FAQs match the keywords you enter in the **Search FAQs** field on the E-Service menu, you can use the options available on this page to search for FAQs based on the following search criteria:

- **Keywords:**
  Enter a word or set of words in the **Keywords** field. The word or a set of words must be part of the FAQ. The keywords could 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 the **Keywords** field.

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

- **Frequently Asked Questions:**
  Select one of the options on the basis of which you must search for the frequently asked questions:
  - **All:** Select this option to search for all the Frequently Asked Questions.
  - **In Change Notification List:** Select this option to search for FAQs that are in the change notification list. An e-mail notification must be sent to the users in regard to any changes in the content of the FAQs that are in the change notification list.
  - **Not in Change Notification List:** Select this option to search for the FAQs that are not in the change notification list. Changes in the content of the FAQs do not have to be informed to the users.

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

The search results appear on the same page:

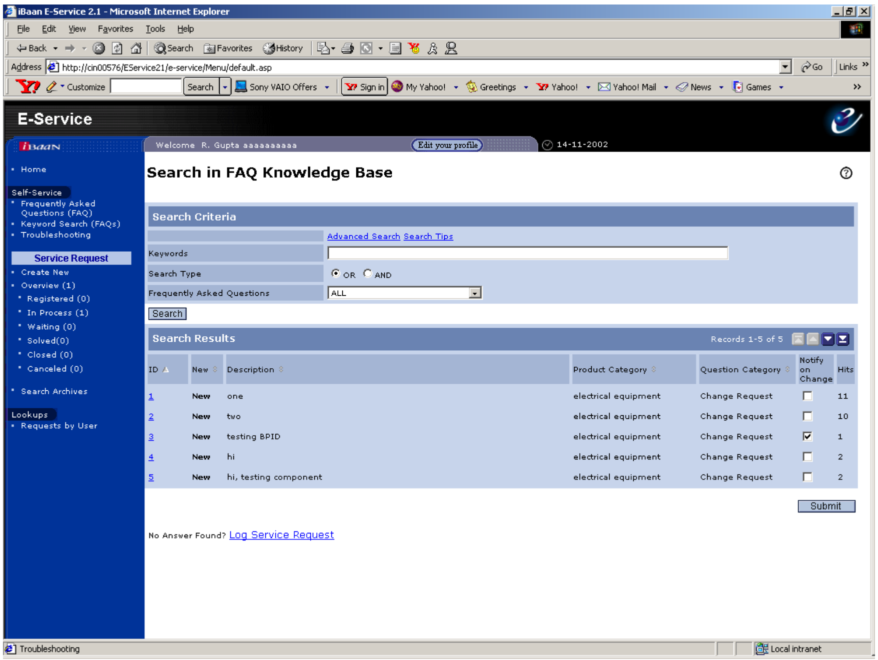

Figure 3-13 Search in FAQ Knowledge Base page results

The following details related to the search results appear:

- **ID:**
  You can view 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 here, which can be the following:
  - **Question Category:** The question category to which the FAQ belongs appears here.
  - **Notify on Change:** Select or clear this check box to receive or stop an e-mail notification that informs you about the change in the FAQ. For more details, refer to “Changed FAQs notification,” previously in this chapter.
- **Hits:** This field informs you about the number of times the specific FAQ is accessed by the users until now.

- Click on the hyperlink available for the FAQ Description to view the FAQ details:

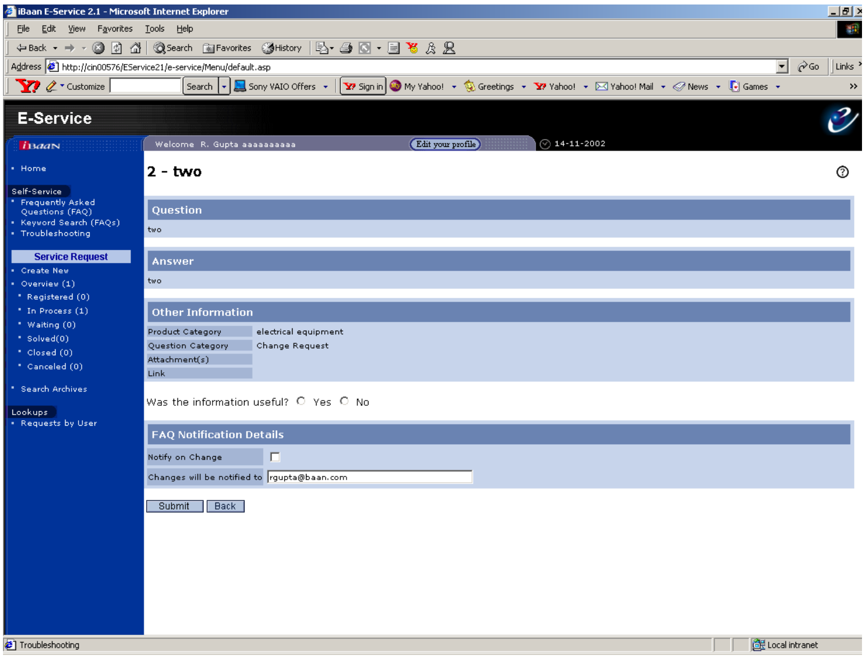

Figure 3-14 FAQ Knowledge Base Search – detail

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 that is attached to the FAQ.
  – **Link**: A link to the Web site used to provide additional details related to the answer.
- Click **Back** to go back to the Search in the FAQ Knowledge Base page.

Advanced Search

Use the **Advanced Search** option on the E-Service menu and on the Search in FAQ Knowledge Base page to access the Advanced Search in the Knowledge Base page:

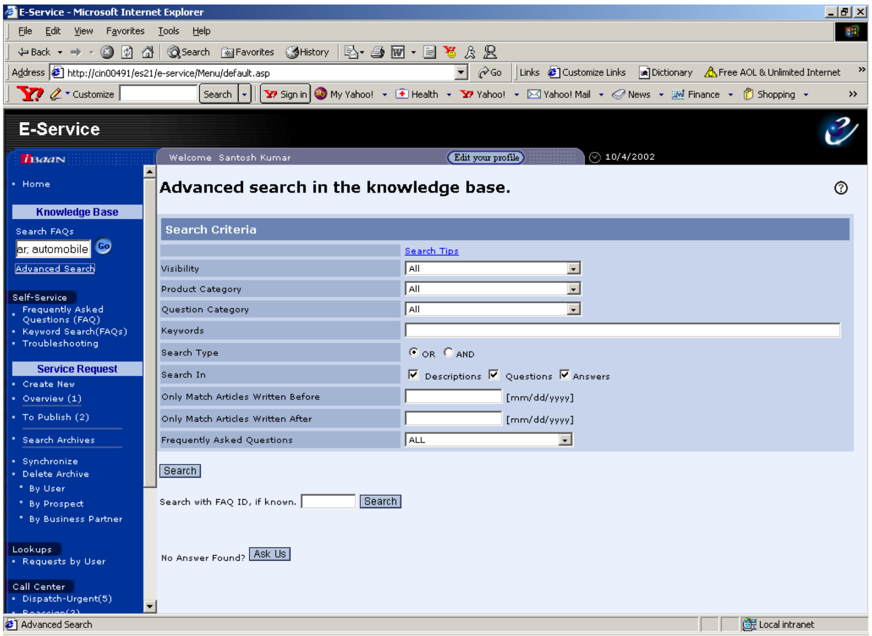

Figure 3-15 Advanced Search in Knowledge Base page

Use the options available on this page to search for FAQs based on one or more of the following search criteria:

- **Visibility**:
  The administrator assigns visibility to the FAQ, based on which the FAQ is assigned to a specific product category. Select the visibility to which the FAQ belongs.
- **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 if the keywords must be separated by And or Or.
- **Search In**:
  An FAQ can be divided into three parts:
  – Description
  – Question
  – Answer

  Select the required options to specify whether the keyword must be a part of the description, question, or answer of the FAQ.
- **Description**:
  Select this check box to search for the keyword in the description of the FAQ.
- **Question**:
  Select this check box to search for the keyword in the question part of the FAQ.
- **Answer**:
  Select this check box to search for the keyword in the answer part of the FAQ.
- **Only Match Articles Written Before**:
  Enter the date in DD/MM/YYYY format to search for FAQs that were published before the specified date.
- **Only Match Articles Written After**:
  Enter the date in DD/MM/YYYY format to search for FAQs that were published after the specified date.
- **Frequently Asked Questions:**
  Select one of the options based on which you must search for the Frequently Asked Questions.
  – **All:** Select this option to search for all the Frequently Asked Questions.
  – **In Change Notification List:** Select this option to search for FAQs that are in the change notification list. An e-mail notification must be sent to the users in regard to any changes in the content of the FAQs that are in the change notification list.
  – **Not in Change Notification List:** Select this option to search for the FAQs that are not in the change notification list. Changes in the content of the FAQs do not have to be informed to the users.
- Click **Search** to locate the FAQs that meet the selection criteria.

The results appear on the same page:

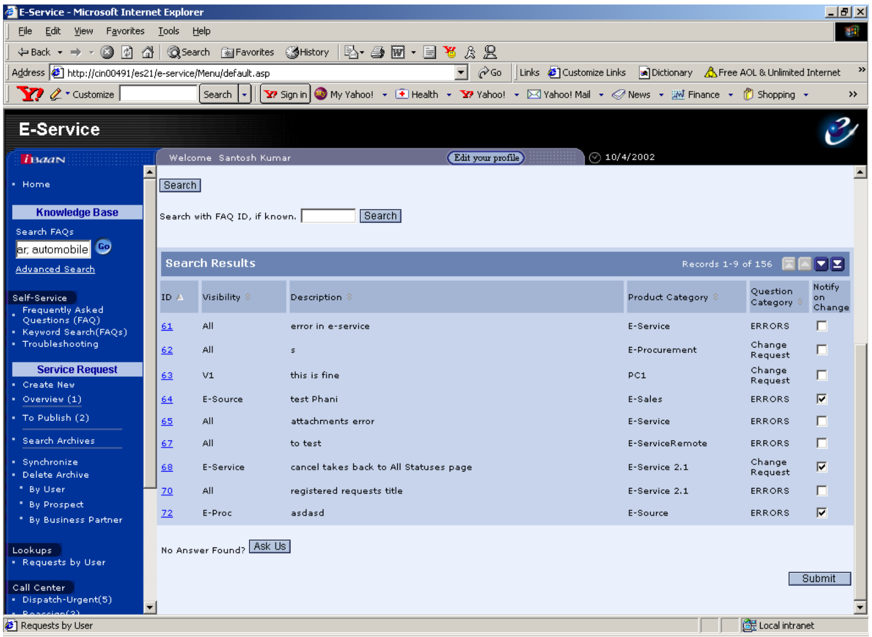

Figure 3-16 Advanced Search in Knowledge Base page results

The following details appear:

- **ID:**
  You can view 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 it 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 here.
- **Question Category:**
  The question category to which the FAQ belongs appears here.

- **Notify on Change:**
  Select or clear this check box to receive or stop an e-mail notification that informs you about the change in the FAQ. For more details, refer to "Changed FAQs notification," previously in this chapter.
- Click the link for **FAQ Description** to view the FAQ details. You can view the following details related to the FAQ:
  - Question
  - Answer
  - Product Category
  - Question Category
  - Attachment(s)
  - Link
  - FAQ Notification Details
- Click **Back** to go back to the Advance Search in Knowledge Base page.

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 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 page to view the tips, which help the user to search the FAQs database:

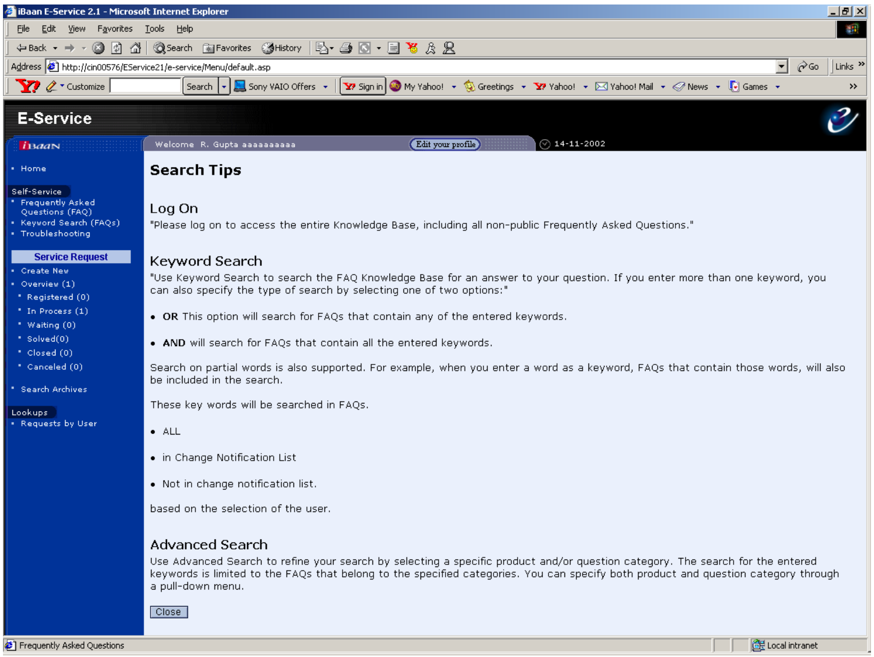

Figure 3-17 Search Tips page

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

Troubleshooting

The troubleshooting functionality of E-Service enables you to figure out solution for a particular problem of 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, 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 were looking for.

This section describes the procedure used to locate the required Troubleshooting tips.

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

To access the Troubleshooting tips, take the following steps:

1 Select the **Troubleshooting** option in the E-Service menu:

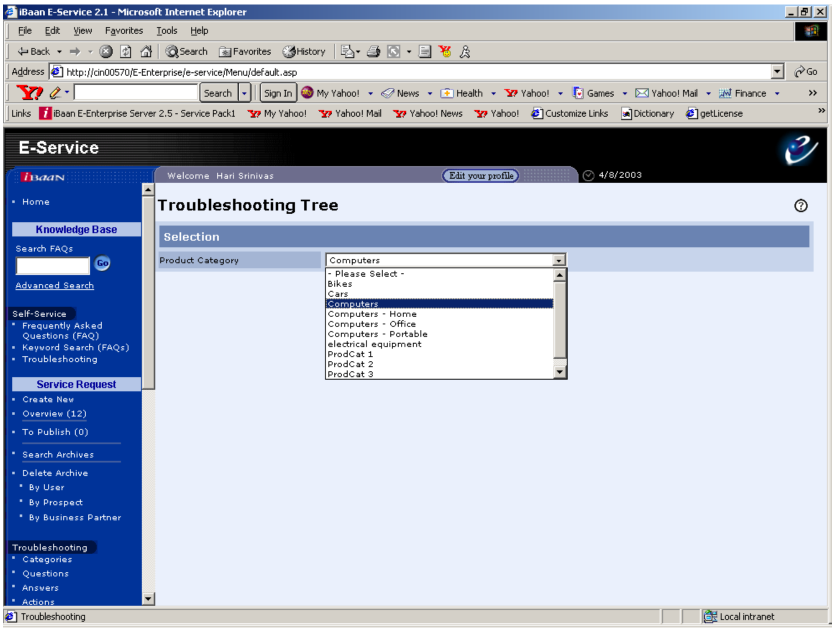

Figure 3-18 Troubleshooting Tree page

2 On the Troubleshooting Tree page, select a product category.

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

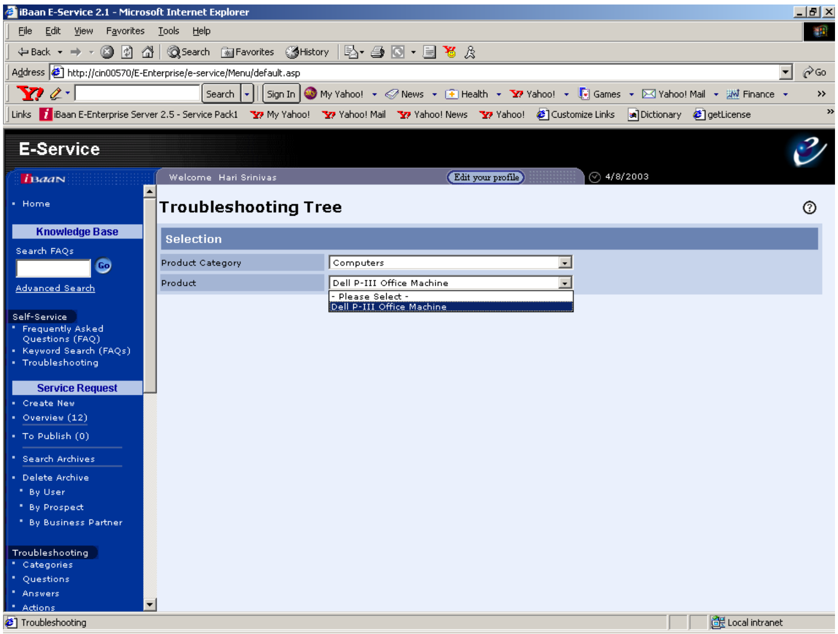

Figure 3-19 Troubleshooting page

3 Select a product specific to the product category to view the troubleshooting tree in the Troubleshooting pane.

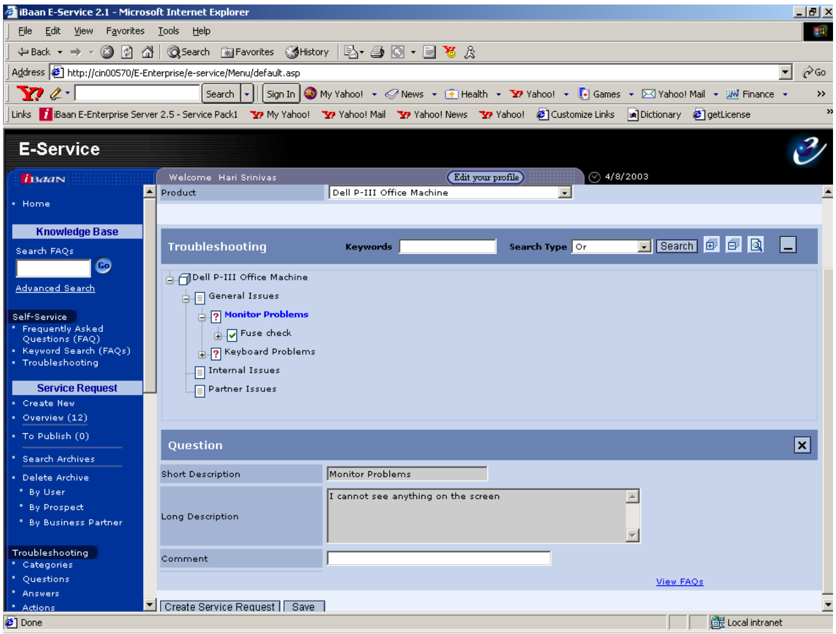

Figure 3-20 Troubleshooting tree in the Troubleshooting pane

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 can be the 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 displays 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 Troubleshootinginput.txt file. This file enables the service provider to find more information related to your problem.
- **See Also:**
  Use the link for further information related to the node you have selected. Additional information could 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.

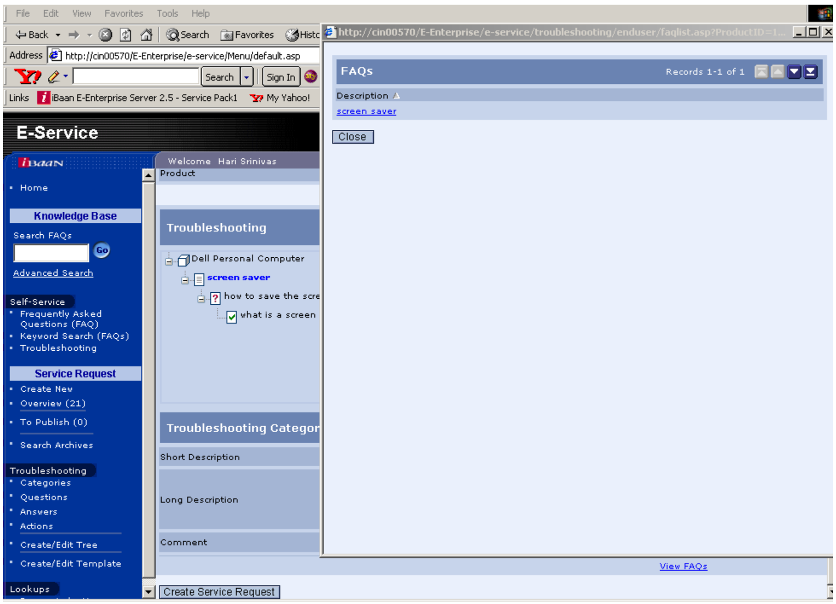

Figure 3-21 FAQs window in the Troubleshooting pane

The list of Frequently Asked Questions appears on 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:**
  The Frequently Asked Question details.
- **Answer:**
  The answer to the Frequently Asked Question.
- **Other Information:**
  You can view the additional information related to the product category, 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.

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

Use the **Save** option on the Troubleshooting page to retain the comment you have entered for the specific node.

Service request

If you fail to find a solution to the problem in the knowledge base or trouble shooting, you must use the **Service Request** option to convey your problem to the service provider. The service provider answers your query. The following describes the procedure you must use to create the service request, and the subsequent section describes the procedure you must use to track the service request until the time you are satisfied with the solution the service provider offers.

Create service request

This section describes the procedure used to create a service request. The procedure varies based on the mode of the application you are using. E-Service can exist as a stand-alone application, or can be integrated with iBaan ERP 5.0c and Baan IVc4. The registered users can access the application in any of the three modes and create a service request. The following sections in this section describe the various procedures used to create a service request.

You can use any one of the following options to create a service request:

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

The user can now access the Create Service Request page.

E-Service as a stand-alone application

The registered users must use the following procedures to create a service request:

Enter the required details on the Create Service Request page:

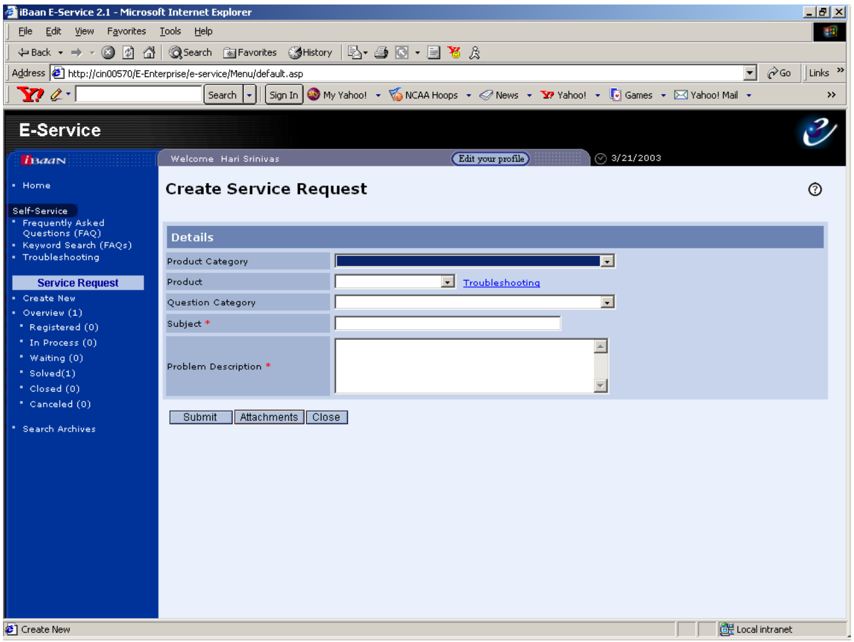

Figure 3-22 Create Service Request page

The Create Service Request page contains 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 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 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.

A value in the **Subject**, and **Problem Description** fields is mandatory. You cannot submit a service request without a value in these fields.

Attachments

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

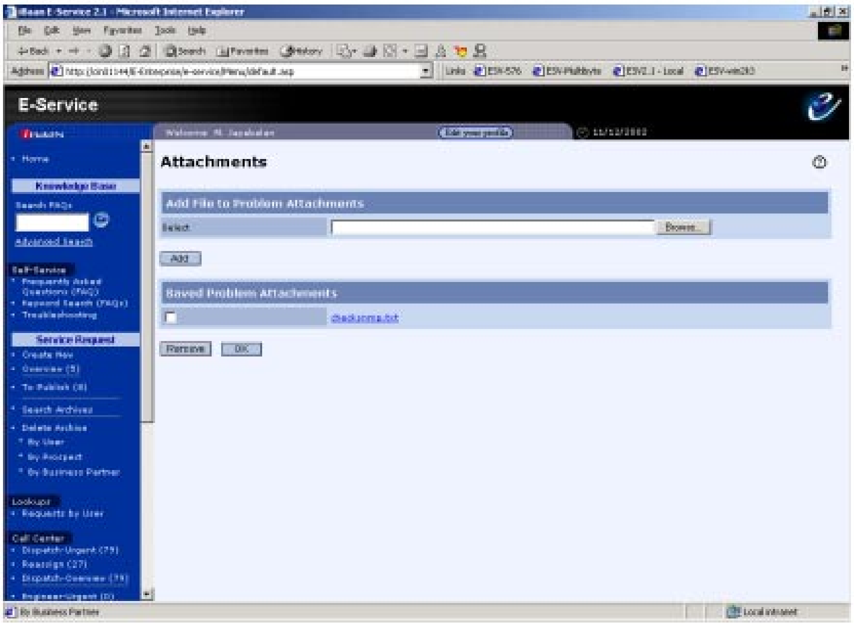

Figure 3-23 Attachments page

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 more 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. You must remove the service request only before you submit the request. After you submit the service request, you can no longer modify the existing attachments. However, you can add more attachments and then resend 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.

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

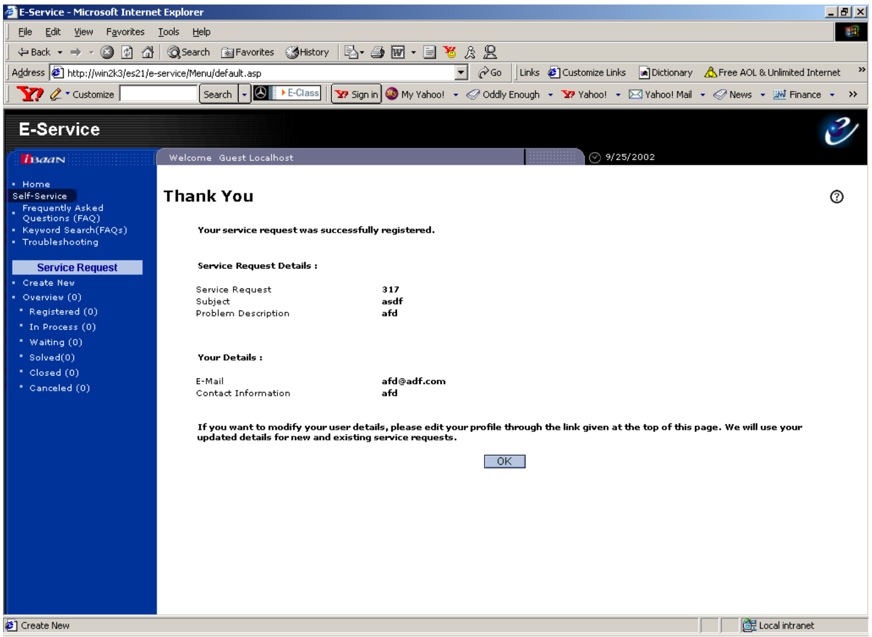

Figure 3-24 Thank You page

View the details you have entered to create a service request on the Thank you page.

Service Request Details:

- **Service Request**:
  The service request identification code.
- **Product Category**:
  The category to which the product belongs. You can view this field only if you have specified a product category to create a service request.
- **Product**:
  The name of the product.
- **Question Category**:
  The category to which the question belongs. You can view this field only if you have specified a question category to create a service request.

- **Subject**:
  The subject of the service request.
- **Problem Description**:
  The problem description specified in the service request.
- **Attachments**:
  View the details related to the attachments linked to the service request. You can view this field only if you have added attachments to the service request.

Your Details:

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

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

E-Service integrated with iBaan ERP 5.0c

This section describes the procedure a registered user must use to create a service in E-Service if the service is integrated with iBaan ERP 5.0c in the back end.

To create a service request, you can either use the **Create New** option in the menu or use the **Create Service Request** link on the Troubleshooting page.

Select one of the options to access the Create Service Request page to create a service request:

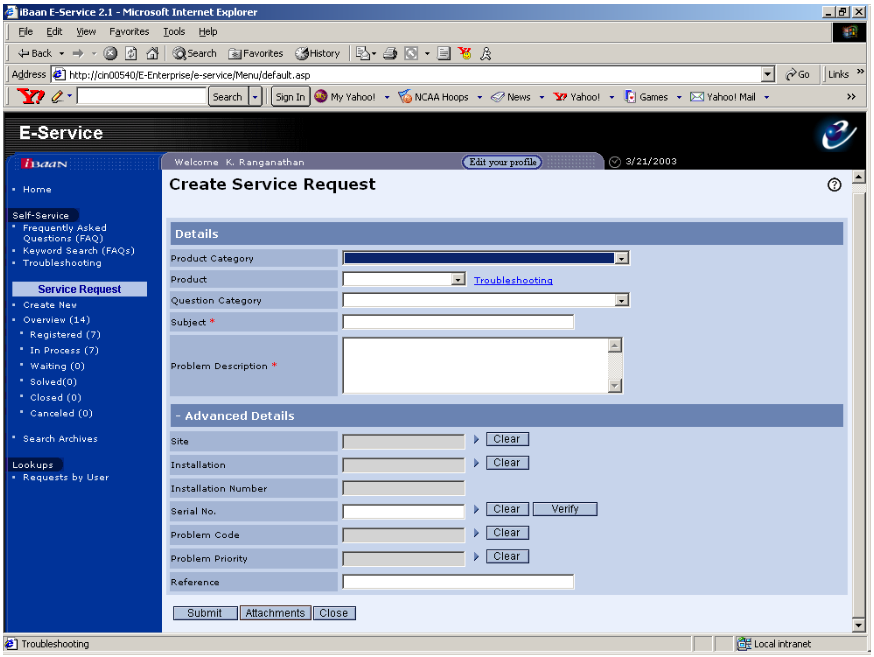

Figure 3-25 Create Service Request

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 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 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 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 code. Click **Clear** to remove the value you have selected.
- **Installation**:
  Select the installation code. Click **Clear** to remove the value you have selected.
- **Installation Number**:
  The installation number appears by default based on the installation code you 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 not correct, 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 code. Click **Clear** to remove the value you have selected.
- **Reference:**
  Enter the text that 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 **Submit** to view the Thank You page:

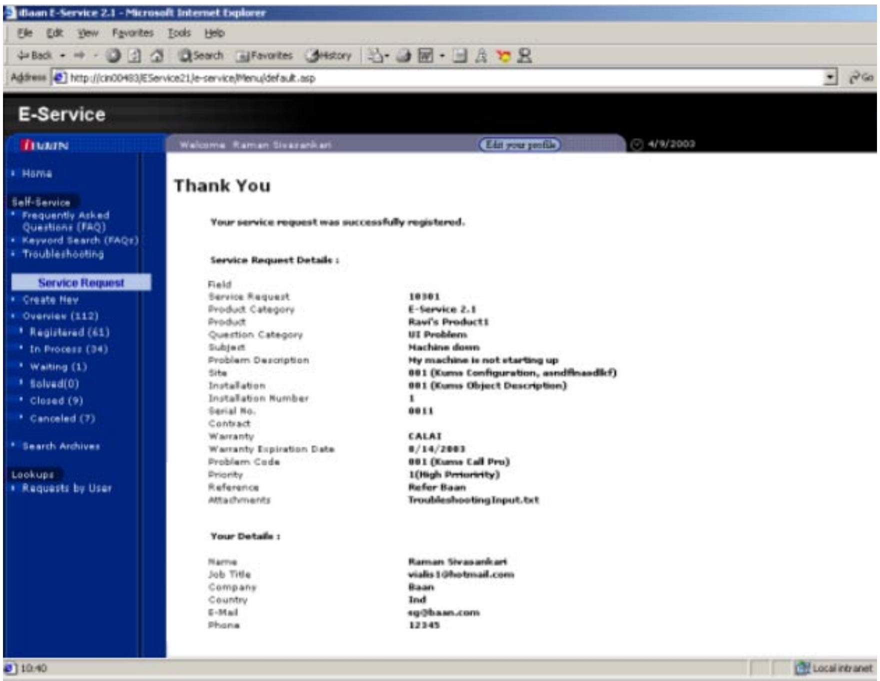

Figure 3-26 Thank You page

This page provides 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 provided on this page to modify the details in your profile. For more information about the details you can modify in your profile, refer to "Logon page," later in this chapter.

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, which 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 with the support center, rather than route the 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 whether 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. To access this page, you can use the **Create New** option on the E-Service menu, or the **Create Service Request** link on the Troubleshooting page/home page.

Enter the following details on this page to create a service request:

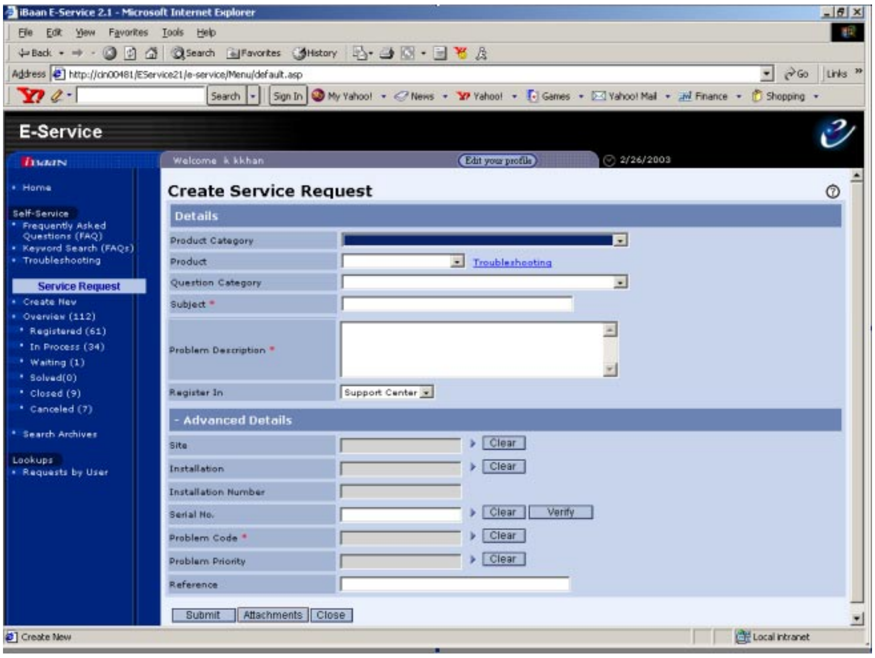

Figure 3-27 Create Service Request page

- **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 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 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 **Routing Option** is set to **Call Center (CC)** or **Support Center (SC)** by the administrator. 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, 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 that 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:

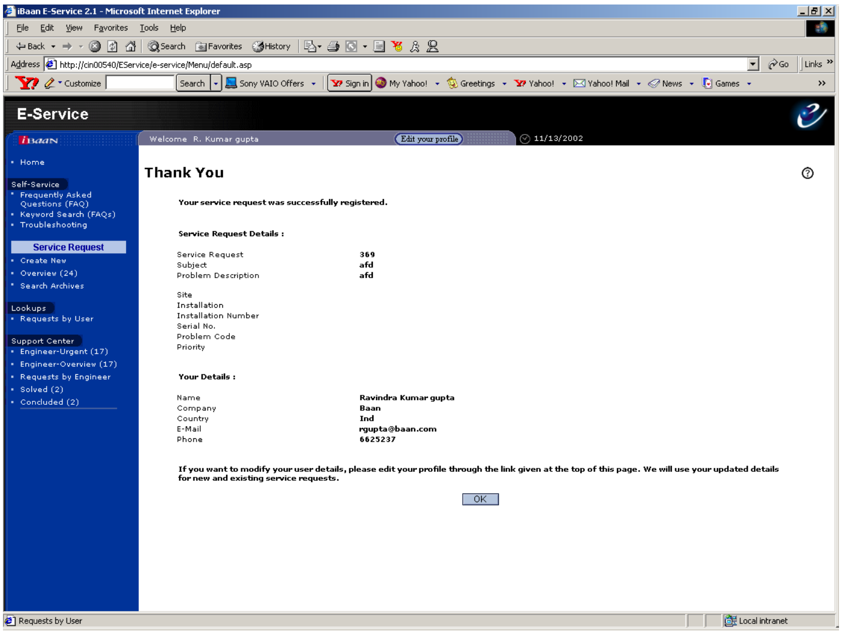

Figure 3-28 Thank You page

This page provides 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 internal users."

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 a registered user must follow to create a service request if E-Service is integrated with Baan IVc4 in the back end.

To create a service request, you can use either the **Create New** option on the E-Service menu, or the **Create Service Request** link on the Troubleshooting page.

Use either one of the options to access the Create Service Request page to create a service request:

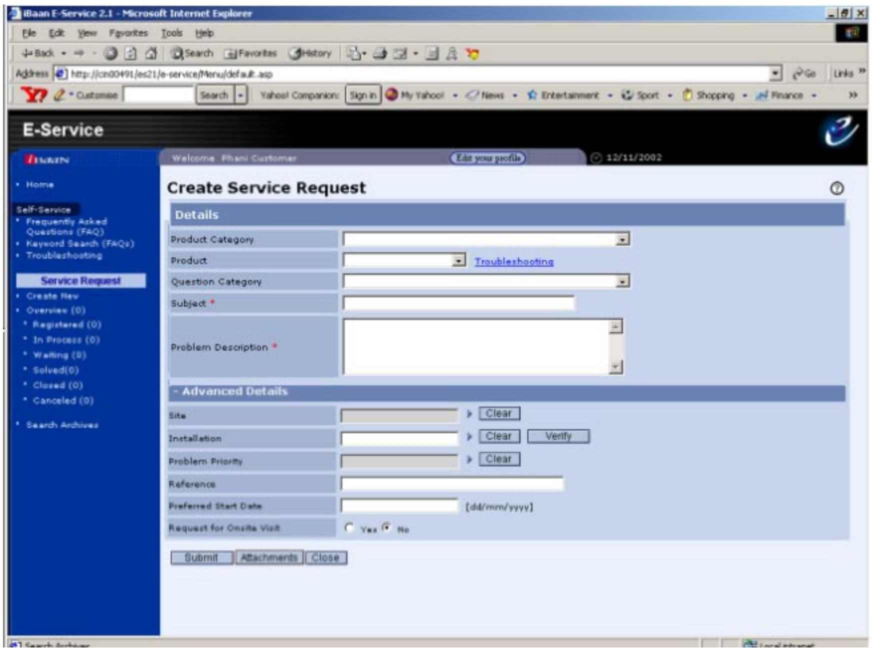

Figure 3-29 Create Service Request page

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 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 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 number. 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 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 an onsite visit.
- **Request for Onsite Visit:**
  Select either **Yes** or **No** to determine whether you require an onsite visit by a service engineer to solve your problem.
- Click **Submit** to send the service request to the service provider.
- Click **Attachments** to add attachments to the service request.
- Click **Close** to go back to the E-Service home page.

If you click **Submit**, you can view the Thank You page, which provides the following details:

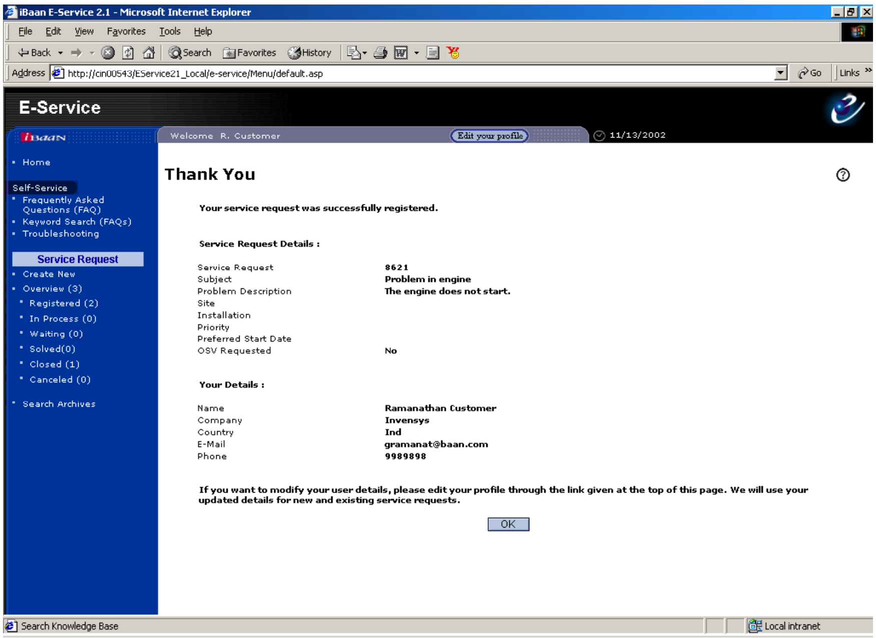

Figure 3-30 Thank You page

You can view the following details on this page:

Service Request Details:

- Service Request
- Product Category
- Product
- Question Category
- 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 on the Edit Your Profile page, refer to “Logon page,” in Chapter 2, E-Service internal users.”

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

Track service request

Users can track the service request on the basis of 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 ERP 5.0c 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:**
  After the service provider starts to work on the service request, the status of the service request is In Process.
- **Waiting:**
  If the service provider needs 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 user’s the problem, the service request has the status Solved.
- **Closed:**
  If the customer is happy with the solution that the service provider offers, the service request status is Closed. In addition, the service provider can close the service request if the user who created the service request does not send acceptance for the solution provided within a specific duration.

- **Accepted:**
  If E-Service is integrated with Baan IV in the back end, the service provider must synchronize the status of the service request with the service order in the back end. If the service order is completed, the status of the service request is Accepted.
- **Cancelled:** After the service request is logged, either the customer or the service provider can cancel the request. If the status of the service request is Registered, the user can cancel the service request. If the status is In Process or Waiting, only the service provider can cancel the service request.

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

Overview

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

A registered user can click **Overview** to view all the service requests you have created, irrespective of the requests' statuses on the Your Requests page:

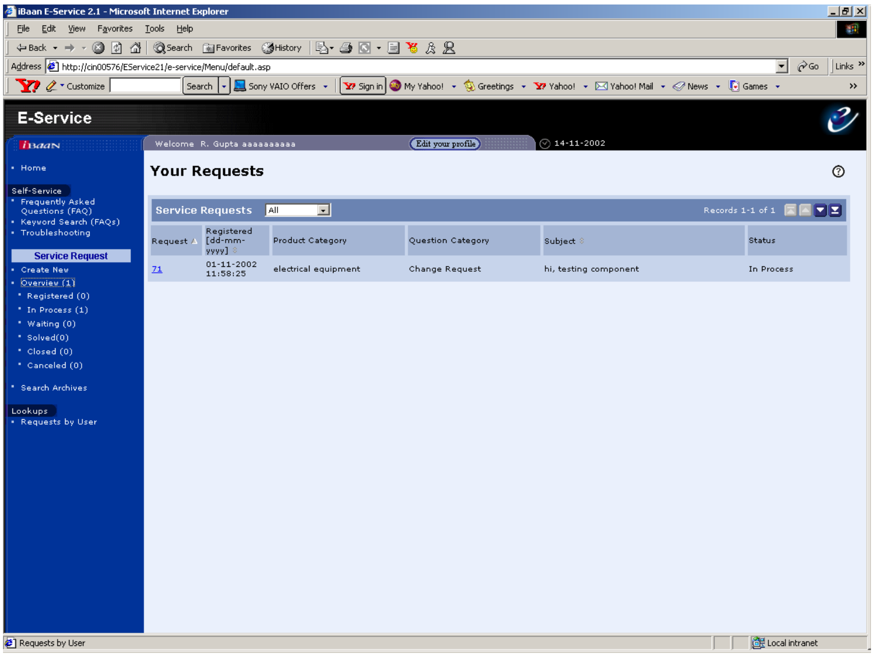

Figure 3-31 Your requests

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 the requests' 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.

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:

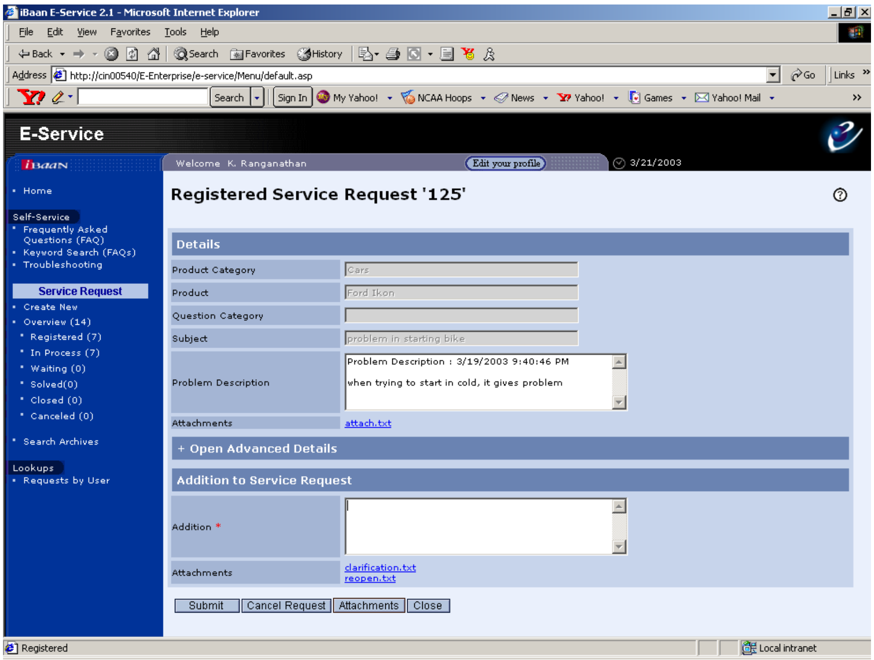

Figure 3-32 Registered Service Request Details

You can view the following details in the Service Request details 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.
- **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 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 request can cancel the request, until the status of the service request is In Process. From then on, only the service provider can cancel the service request, and only if possible.
- **Attachments**:
  Use this option to add the attachments. The procedure used to add the attachments is described in the previous section. 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.

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 be used to provide reference to the service provider.
- **Preferred Start Date:**
  View the end user’s preferred start date for an onsite visit.

- **Request for Onsite Visit:**
  View the option that is used to determine whether the user requires an onsite visit by a service engineer to solve your problem.

If E-Service is integrated with iBaan ERP 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 have selected.
- **Serial Number:**
  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 that can be used to provide reference to the service provider.

In Process

You can view the following details for a service request that is In Process:

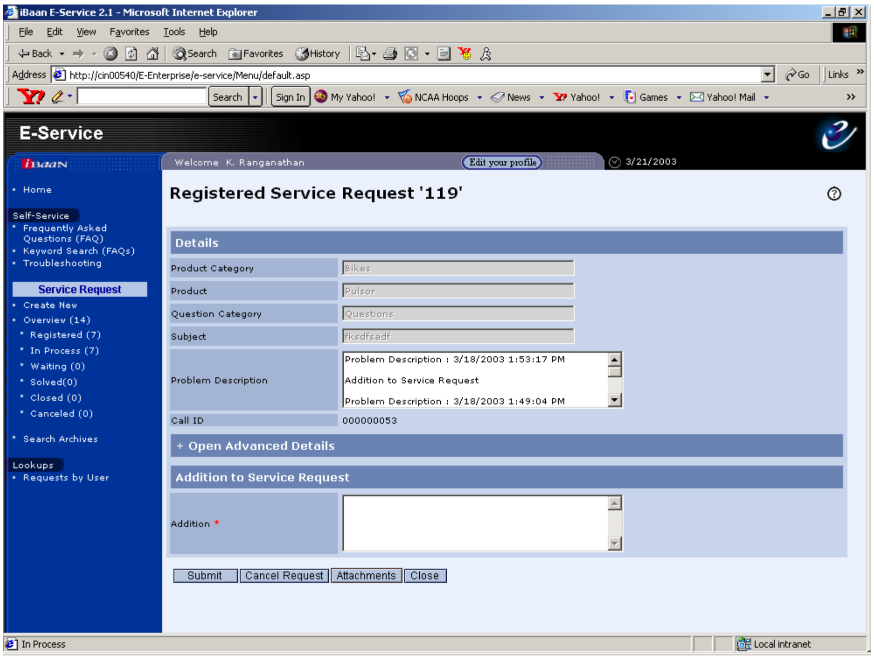

Figure 3-33 Service Request details page

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

- **Product Category:**
  The product category to which the service request belongs.
- **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 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.
- **Close:**
  Click to go back to the Your Requests page.
- **Cancel Request:**
  Use this option to cancel the service request.

You can view the Thank You page that states 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 in 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 can be used to provide reference to the service provider.
- **Preferred Start Date:**
  View the end user’s preferred start date for an onsite visit.
- **Request for Onsite Visit:**
  View the option that is used to determine if you require an onsite visit by a service engineer to solve your problem.

If E-Service is integrated with iBaan ERP 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 have selected.
- **Serial Number:**
  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 that can be used to provide reference to the service provider.

Waiting

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

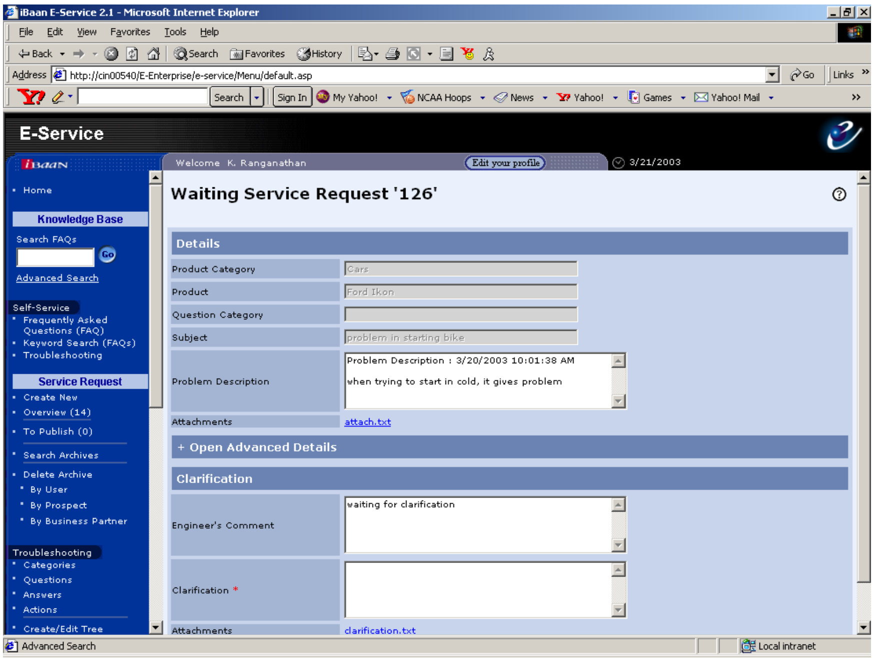

Figure 3-34 Waiting Service Request details page

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

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

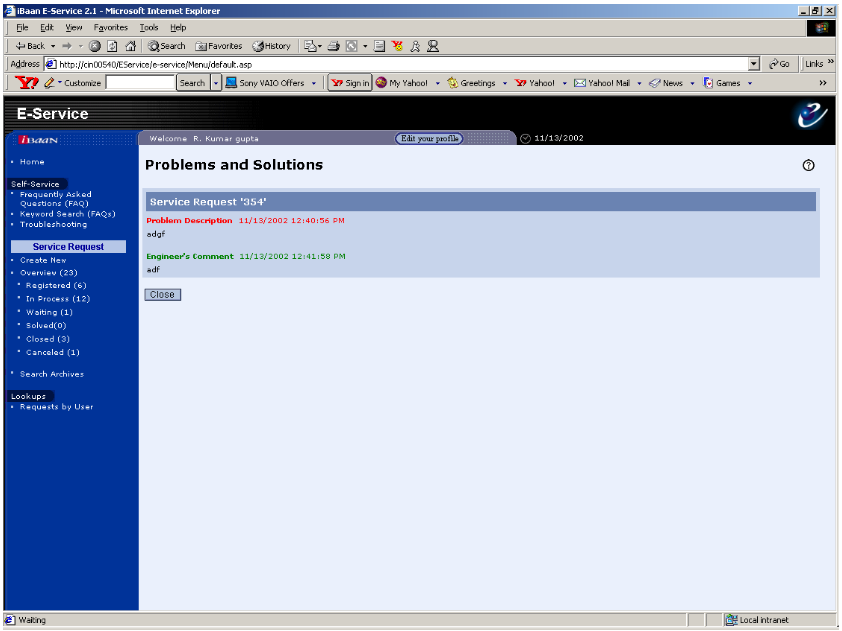

Figure 3-35 Problems and Solutions page

The problem and all the solutions related to the problem appear on this page.

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 an onsite visit.
- **Request for Onsite Visit:**
  View the option that is used to determine if you require an onsite visit by a service engineer to solve your problem.

If E-Service is integrated with iBaan ERP 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 have selected.
- **Serial Number:**
  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 that can be used to provide reference to the service provider.

Closed

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

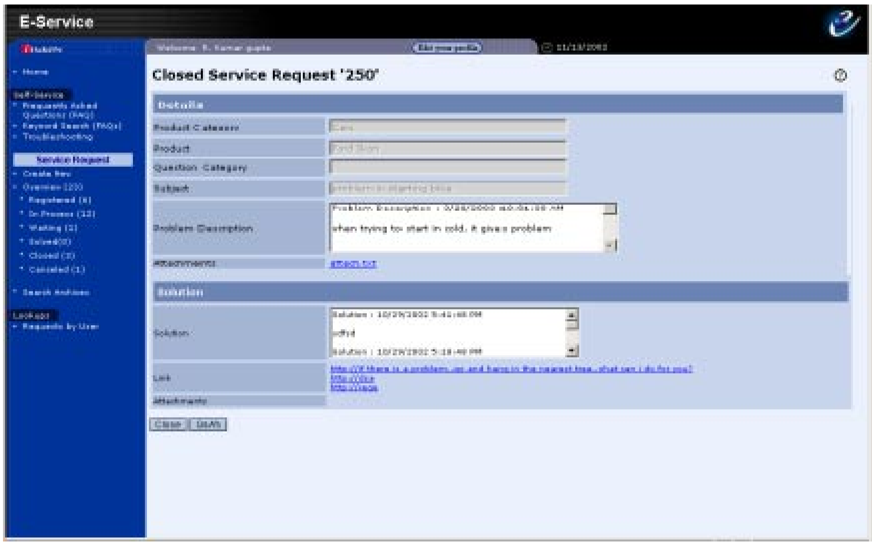

Figure 3-36 Closed Service Request details page

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

- **Product Category:**
  The product category to which the service request belongs.
- **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 on the Problems and Solutions 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 an onsite visit.
- **Request for Onsite Visit:**
  View the option that is used to determine if you require an onsite visit by a service engineer to solve your problem.

If E-Service is integrated with iBaan ERP 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 have selected.

- **Serial Number:**
  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 that can be used to provide reference to the service provider.

Cancel request

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

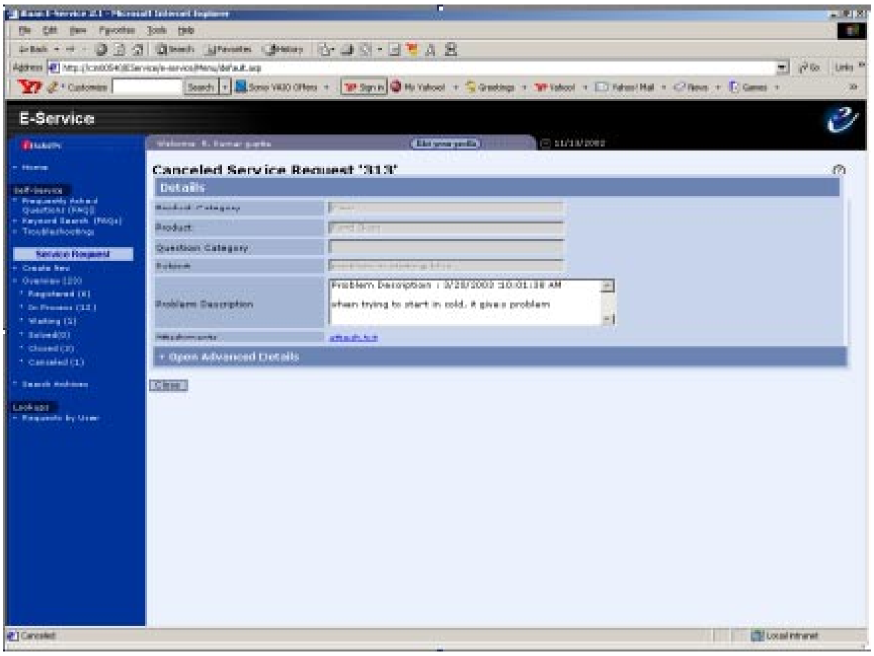

Figure 3-37 Cancelled Service Request details page

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

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

- **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.
- **Problem Description:**
  The detailed description of the problem specified in the service request.
- **Attachments:**
  The attachments linked to the document.

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 an onsite visit.
- **Request for Onsite Visit:**
  View the option that is used to determine if you require an onsite visit by a service engineer to solve your problem.

If E-Service is integrated with iBaan ERP 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 have selected.
- **Serial Number:**
  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 that can be used 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:

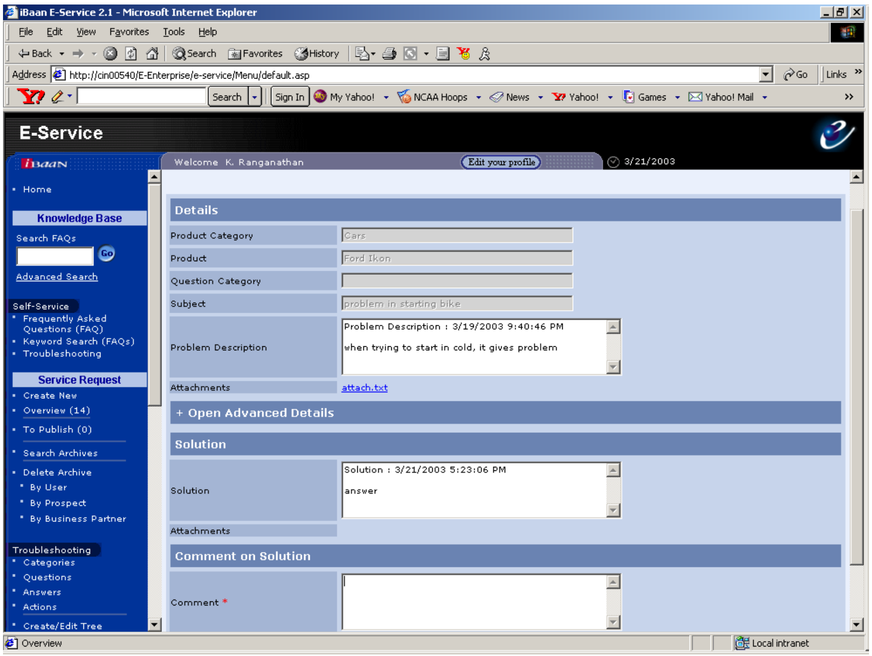

Figure 3-38 Solved Service Request page

- **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.
- **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 unsatisfied 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.

Search archives

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

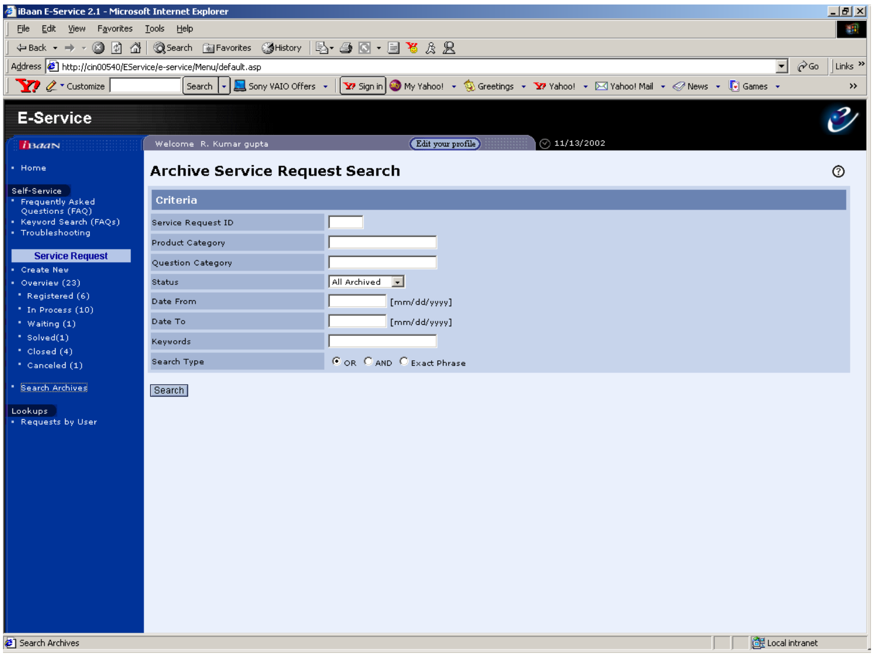

Figure 3-39 Archive Service Request Search page

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 this option is selected, all the archived service requests appear.
- **Closed:**
  If this option is selected, all the service requests with the status Closed appear.
- **Cancelled:**
  If this option is selected, all the service requests with the status Cancelled appear.
- **Date From:**
  Enter the date in DD/MM/YYYY format. All the service requests that are archived after the specified date appear.
- **Date To:**
  Enter the date in DD/MM/YYYY format. All the service requests that are archived up to the specified date appear.
- **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** options 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.

Archive Service Request Search Results

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

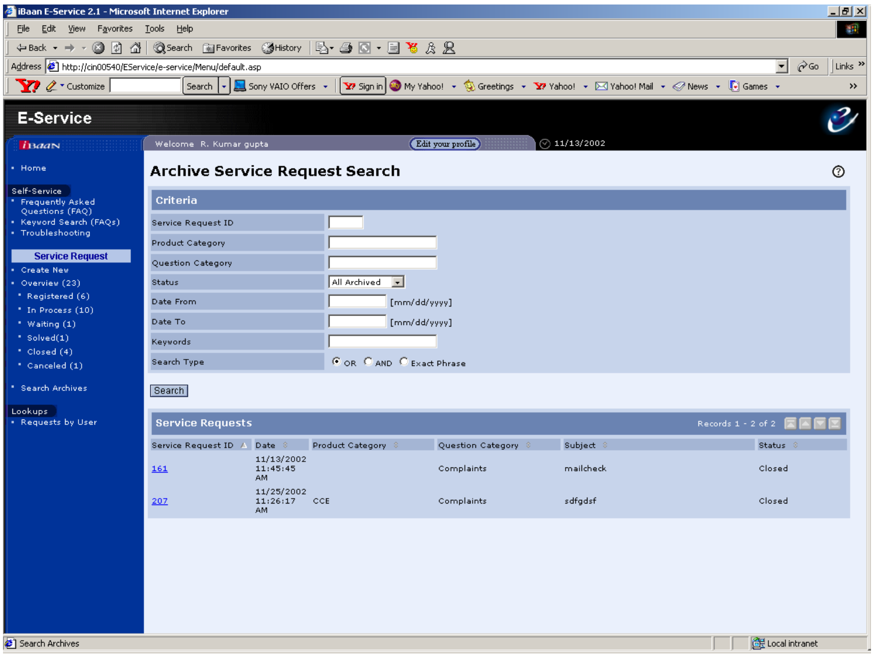

Figure 3-40 Archive Service Request Search results page

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 appears 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 appears in this field.
- **Product Category:**
  The category to which the product specified in the service request belongs appears here.
- **Question Category:**
  The category to which the question specified in the service request belongs appears here.

- **Subject:**
  The subject specified by the user appears here.
- **Status:**
  The status of the service request in the archives appears 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 Baan IVc4 in the back end, you can view the 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.

4 E-Service stand-alone mode

This chapter describes the role of the internal users when E-Service is used as a stand-alone application.

The E-Service application in stand-alone mode provides normal help desk facility to the users. The help desk is called a call center and includes the internal users, who can be classified as call center dispatchers, call center engineers, call center supervisors, support agents, and publishers.

This chapter describes the following:

- Service request process
- Functions and features of the call center dispatcher
- Functions and features of the call center engineer
- Functions and features of the call center supervisor
- Functions and features of the support Agent
- Functions and features of a publisher

Service request process

This section describes the process flow of a service request in E-Service as a stand-alone application.

E-Service as a stand-alone application

1. The external user of the application enters the data required to create a service request.
2. The external user submits the service request. The status of the service request is Registered.
3. The service request is dispatched to a call center engineer, either manually by a call center dispatcher or automatically by the application on the basis of automatic dispatching rules.
4. The call center engineer takes the service requests In-Hand. The call center engineer must provide a solution to the service request. For the external user who created the service request, the status of the service request is In Process.
5. After taking the service request In-Hand, the call center engineer can provide a solution to the service request.

6 If the call center engineer requires clarification related to the query specified in the service request, the service request has the status Waiting (For External Clarification).

7 If the call center engineer requires clarification from another internal source, the status of the service request is Waiting (For Internal Clarification). However, for the user who created the service request, the status remains In Process.

8 The customer provides clarification to the waiting service request. The status of the service request is Clarified.

9 Based on the clarification from either the external user or the internal source, the call center engineer provides a solution to the service request. The status of the service request is Solved.

10 The user who created the service request accepts the solution provided by the call center engineer:

Or:

If the user is unsatisfied, the service request can be re-opened with comments.

11 The Reopened service request is automatically assigned to the call center engineer who provided the solution previously.

12 The cycle continues until the customer is satisfied. The status of the service request is then Closed.

A service request can also be closed if the user does not respond to the solution provided to the service request after a specific duration.

13 The call center engineer sends the service requests to the publisher with comments.

14 The publisher can either publish the service request as a Frequently Asked Questions or close the service request.

This procedure is the process flow of a service request in E-Service as a stand-alone application. While the basic process remains the same, some enhancements apply to the flow if E-Service is integrated with iBaan ERP in the back end. For more information, refer to the relevant section in Chapter 5, “E-Service integrated with iBaan ERP 5.0c,” or Chapter 6, “E-Service integrated with Baan IVc4.”

Dispatching rules

The dispatching rules are a predefined set of rules to assign weightage to the engineers on the basis of the following:

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

These rules are used for both automatic and manual dispatching.

While dispatching automatically, the service request is automatically assigned to the engineer based on the weightage.

For manual dispatching, the administrator must define the parameters, based on which the application uses the dispatch rules for manual dispatching.

Based on the parameters defined by the administrator, if the dispatch rules are used for manual dispatching, the dispatcher can view the list of engineers, which is sorted on the basis of the dispatch rules. If dispatching rules are not used for manual dispatching, the dispatcher can view the engineers list in alphabetical order.

The engineers list contains details such as the engineer’s first name, last name, country, e-mail address, and the language the engineer uses.

Call center dispatcher

This section describes the functions and features available to the call center dispatcher. If the service request is not automatically assigned to the call center engineer based on the dispatch rules, the dispatcher must manually assign the service request to the call center engineer.

An internal user of the application, with the role of a dispatcher can do the following:

- View an overview of the service requests.
- Assign the service requests to the call center engineers.
- Cancel a service request.
- Reassign the service request.

Dispatcher overview

The dispatcher can view a list of all the service requests that must be dispatched to the call center engineers on this page:

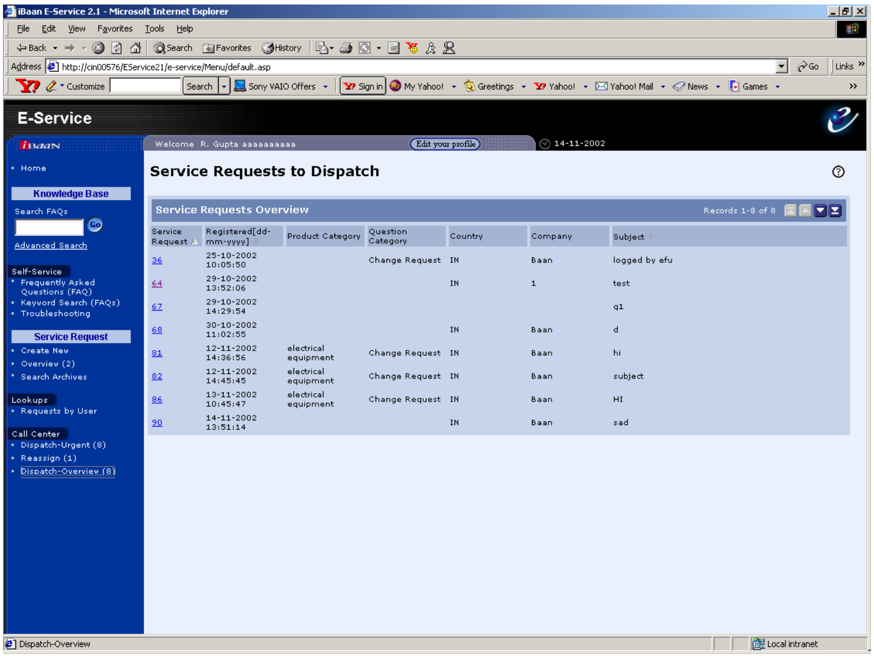

Figure 4-1 Service Requests to Dispatch overview page

The Service Request to Dispatch page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Subject	View the subject specified by the user to identify the service request.

Click on the hyperlink available for the service request number to perform the following actions on the service request:

- Assign service request
- Reassign service request
- Cancel service request

Assign service request

To assign a service request to a call center engineer, the dispatcher must click the hyperlink available on the Service Requests to Dispatch page:

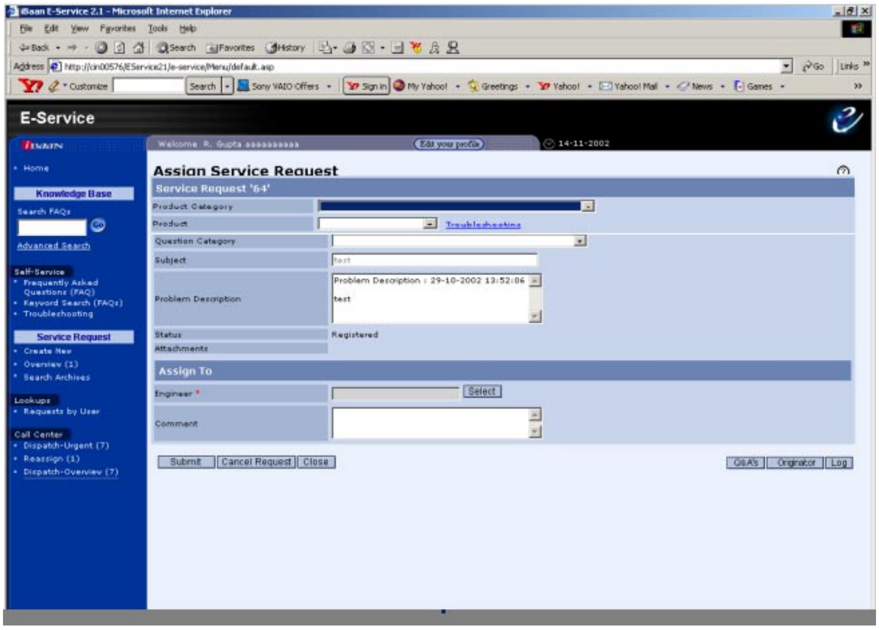

Figure 4-2 Assign Service Request page

The Assign Service Request page contains the following data fields:

Fields	Description
Product Category	View the category to which the product belongs. The product category specified by the user appears by default. The dispatcher can, however, modify the product category.
Product	View the name of the product.
Question category	View the category to which the question belongs. The question category specified by the user appears by default. The dispatcher can, however, modify the question category.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem.
Status	View the status of the service request.
Attachments	View the attachments linked to the service request.

Use the options available in the **Assign To** group box to do the following:

Fields	Description
Engineer	Select the call center engineer to whom you must attach the service request.
Comment	Enter comment to the service request.

- Click **Submit** to assign the service request to an engineer.
- Click **Cancel Request** to cancel the service request.
- Click **Cancel** to go to the Service Requests to Dispatch page.
- Click **Q&A** to view the details related to the problem and solution specified in the service request.
- Click **Originator** to view the details related to the user who created the service request.
- Click **Log** to view the transactions log, which provides details of the various stages of the service request.

The following sections of this chapter describe each of these options in detail.

Select an engineer

To assign a service request to the call center engineer, on the Assign Service Request page, the dispatcher must select the required call center engineer from the Call Center Engineers page:

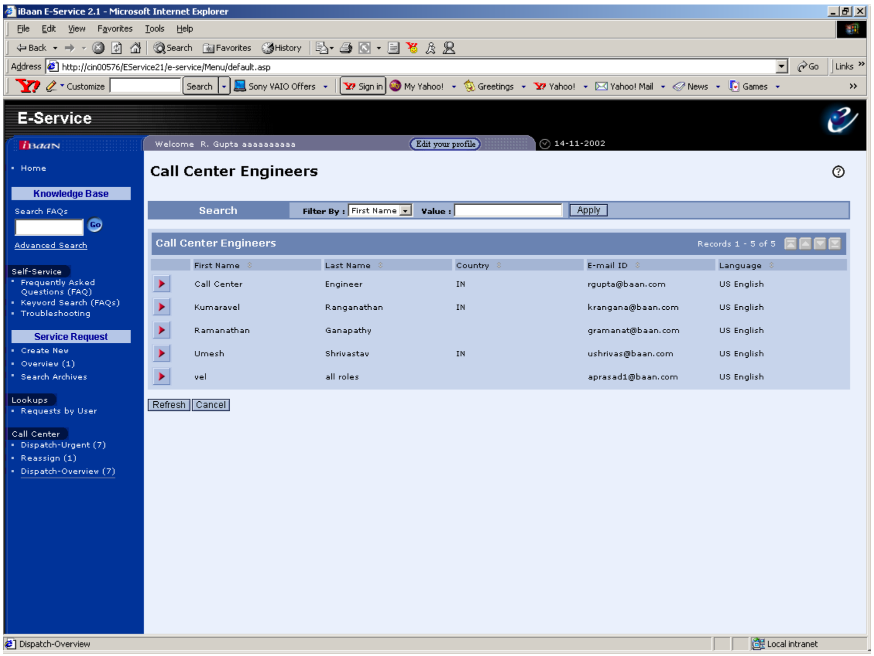

Figure 4-3 Call Center Engineers page

This page provides a list of all the call center engineers.

Based on the parameters defined by the administrator, if the application uses the dispatch rules to assign the service requests manually, the call center engineers appear on this page in the order of the weightage assigned to them.

If the application is not using the dispatch rules to manually assign the service request, the names of the call center engineers appear in alphabetical order.

View the following details related to a support center engineer on this page:

Fields	Description
Sequence number	View the sequence number.
First name	View the call center engineer's first name.
Last Name	View the call center engineer's last name.
Country	View the country to which the call center engineer belongs.
E-Mail address	View the call center engineer's e-mail address.
Language	View the language used by the call center engineer.

Use the icon corresponding to the sequence number to select the required engineer. The service request is assigned to the selected engineer on the Assign Service Request page.

Use the filters available on this page to search for the required call center engineer based on the following:

- First name
- Last name
- Country
- E-mail
- Language

Cancel service request

The dispatcher must use the **Cancel Request** option available on the Assign Service Request page to cancel the service request.

- The dispatcher can cancel the service request if the status of the service request is In Hand, Waiting (For Internal Clarification), or Waiting (For External Clarification). The call center engineer cannot cancel the service request if the status of the call is In Progress in the back end.

Use the Cancel This Service Request page to cancel the service request:

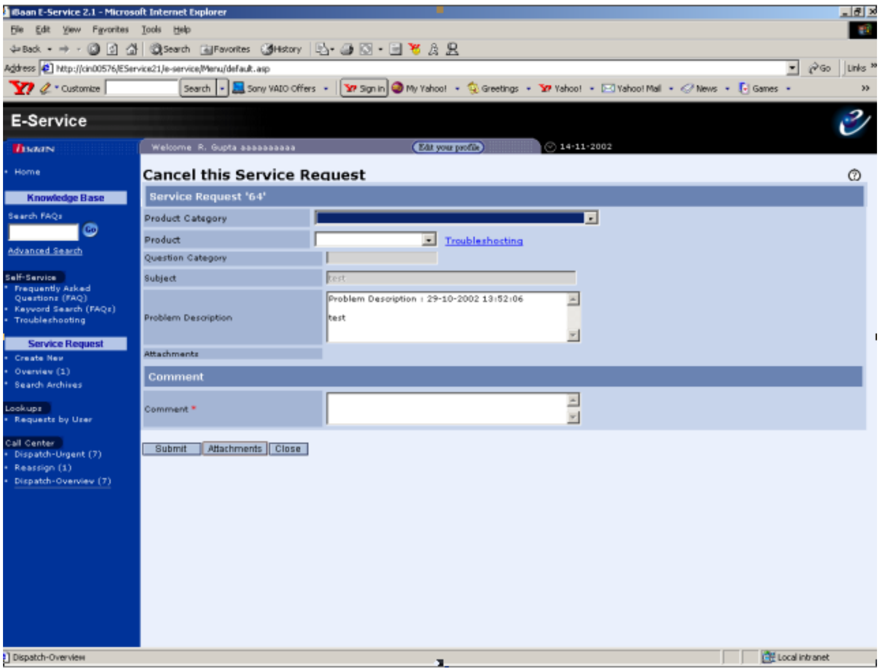

Figure 4-4 Cancel this Service Request page

The Cancel This Service Request page contains the following data fields:

Fields	Description
Product Category	View the category to which the product belongs. The product category specified by the user appears by default. The dispatcher can, however, modify the product category.
Product	View the name of the product.
Question category	View the category to which the question belongs. The question category specified by the user appears by default. The dispatcher can, however, modify the question category.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem.
Status	View the status of the service request.
Attachments	View the attachments linked to the service request.
Comment	The dispatcher must enter the reason for cancelling the service request.

- Click **Submit** to cancel the service request and go to the Service Requests to Dispatch page. The status of the service request changes to Cancelled.
- Click **Attachments** to view the attachments related to the service request.
- Click **Close** to go back to the Service Requests to Dispatch page without cancelling the service request.

Reassign service requests

The dispatcher must re-assign a service request for various reasons, which include the following:

- Service request is not in the purview of the engineer to whom the request was initially assigned.
- The call center engineer feels another person is more qualified to answer the query in the service request,
- The engineer to whom the request was initially assigned is busy and cannot provide a quick and efficient reply to the user who logged the service request.

To reassign a service request, the engineer uses the **Reassign** option in the service request. After the engineer uses the assign option, the service request is added to the dispatcher's reassign queue. The dispatcher must click the **Reassign** option on the E-Service menu to access the Service Requests to Dispatch page:

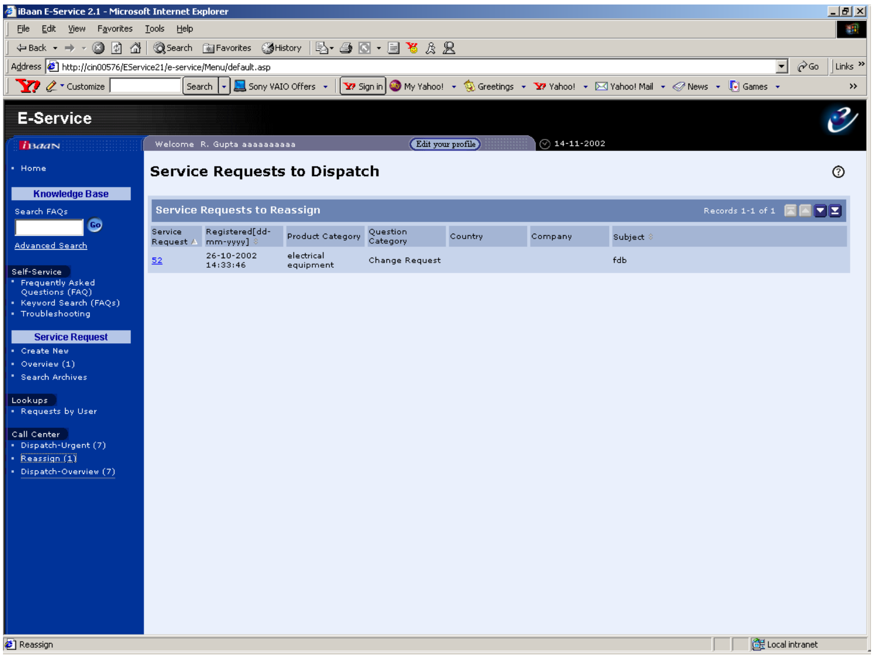

Figure 4-5 Service Requests to Dispatch page

The Service Request to Dispatch page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Subject	View the subject specified by the user to identify the service request.

Click on the hyperlink available for the service request number to perform the following actions on the service request:

- Reassign service request
- Cancel service request

Click the hyperlink to access the Assign Service Request page:

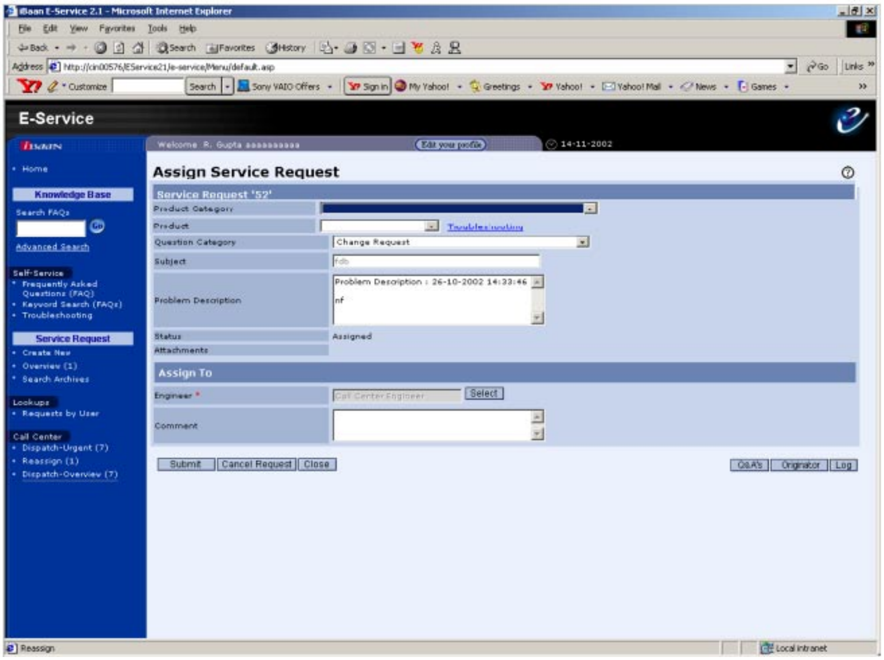

Figure 4-6 Assign Service Request page

The Assign Service Request page contains the following data fields:

Fields	Description
Product Category	View the category to which the product belongs. The product category specified by the user appears by default. The dispatcher can, however, modify the product category.
Product	View the name of the product.
Question category	View the category to which the question belongs. The question category specified by the user appears by default. The dispatcher can, however, modify the question category.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem.
Status	View the status of the service request.
Attachments	View the attachments linked to the service request.

Use the options available in the **Assign To** group box to do the following:

Fields	Description
Engineer	Select the call center engineer to whom you must assign the service request. The name of the engineer to whom the service request was initially assigned appears by default. For more details about the procedure used to select an engineer to reassign the service request, refer to “Select an engineer,” in this chapter.
Comment	Enter comment to the service request.

- Click **Submit** to assign the service request to an engineer.
- Click **Cancel Request** to cancel the service request. For more details about the procedure used to cancel the service request, refer to “Cancel service request,” in this chapter.
- Click **Cancel** to go to the Service Requests to Dispatch page.
- Click **Q&A** to view the details related to the problem and solution specified in the service request. For more information, refer to “View Q&A,” in this chapter.
- Click **Originator** to view the details related to the user who created the service request. For more information, refer to “View originator,” in this chapter.

- Click **Log** to view the transactions log, which provides details of the various stages of the service request. For more information, refer to "View log," in this chapter.

View Q&As

The **Q&A** option enables you to access the Problems and Solutions page. Use this page to view the details related to the problem specified in the service request and the solution provided by the engineer:

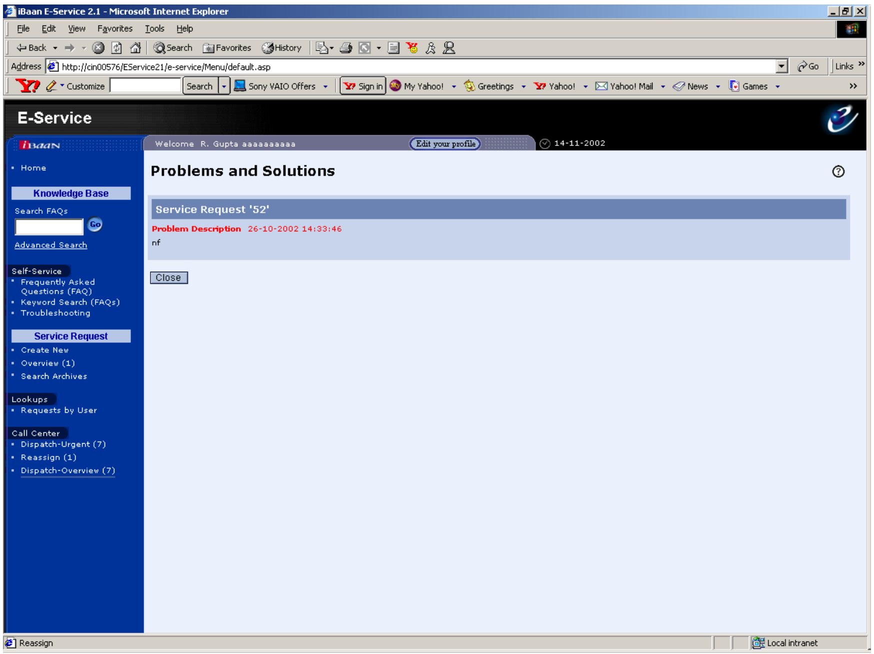

Figure 4-7 Problem and Solution page

View the following details on this page:

- The service request number
- The date and time when the service request was sent to the service provider.
- The problem details.
- The date and the time when the call center engineer provides a solution.
- The solution details.

Click **Close** to go back to the page from which you accessed the **Q&A** option.

View originator

The **Originator** option enables you to access the User Details page, which enables you to view the following details related to the user who created the service request:

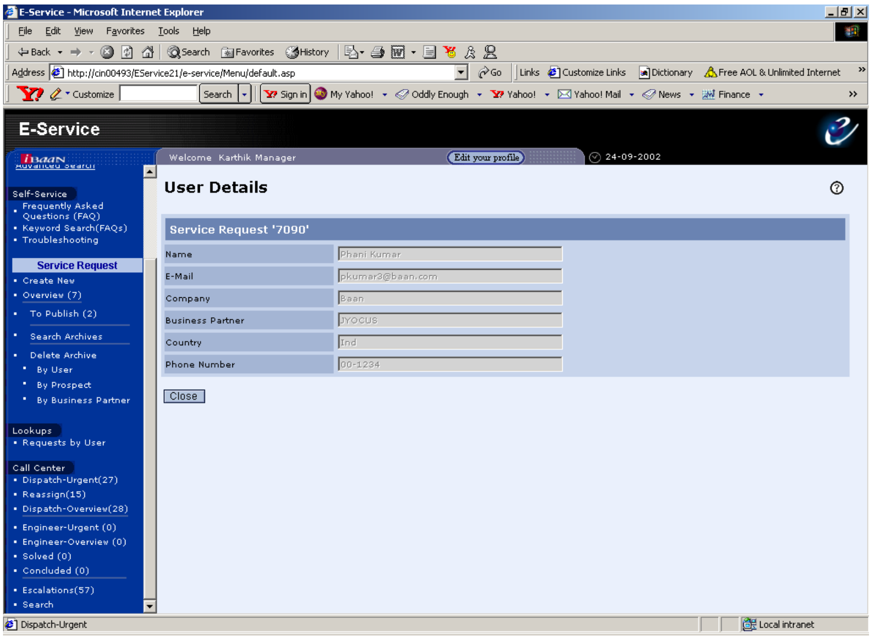

Figure 4-8 User Details page

View the following details on this page:

Fields	Description
Name	View the name of the user who created the service request.
E-mail	View the user’s e-mail address.
Company	View the name of the company to which the user belongs.
Business partner	View the business partner identification code to which the user belongs.
Job title	View the user’s job title.
Country	View the country to which the user belongs.
Phone number	View the user’s telephone number.

Click **Close** to go back to the page from which you accessed the **Originator** option.

View log

The **Log** option enables you to access the Transactions page, which provides with the details of the various stages in the processing of the service request:

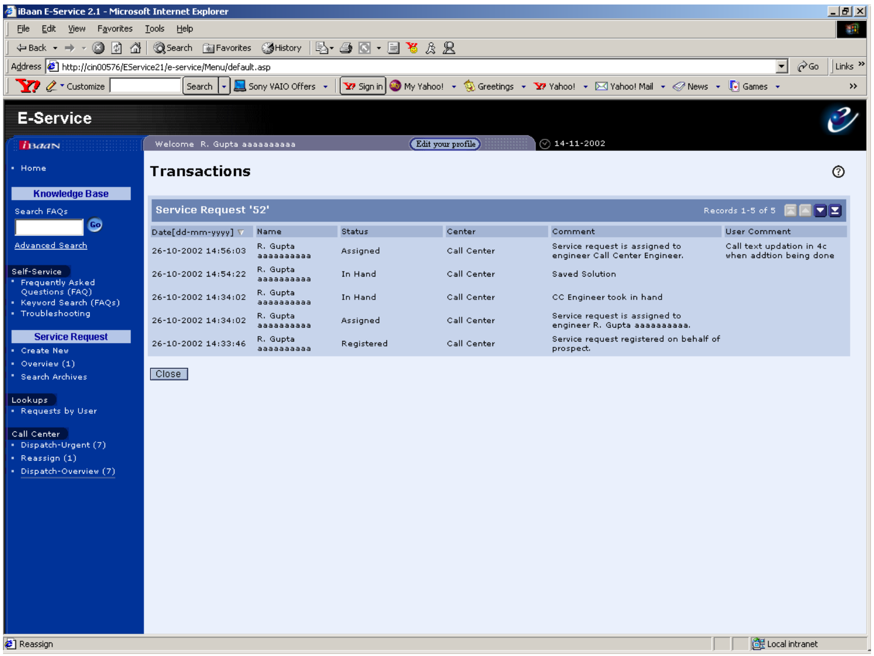

Figure 4-9 Transactions page

View the following details on the Transactions page:

Fields	Description
Date	View the date on which the service request was processed.
Name	View the name of the user who acted on the service request.
Status	View the status of the service request on the specified date.
Center	View the center that performed the action on the service request.
Comment	View the internal user's comment attached to the service request.
User comment	View the user's comments.

Click **Close** to go back to the page on which you selected the **Log** option.

Dispatch - Urgent

The dispatcher must use the **Dispatcher-Urgent** option available on the E-Service menu to view all the service requests that must be dispatched immediately to the call center engineers.

Based on the parameters defined by the administrator, all the service requests that are submitted by the users switch to Dispatch Urgent status after a specified period.

The service requests that the dispatcher can view using the **Dispatacher-Urgent** option on the E-Service menu are also available using the **Dispatcher-Overview** option.

The procedure used to assign the service requests in the Dispatcher-Urgent state is similar to the procedure used to dispatch a normal service request.

For more details of the procedure used to assign service requests to the call center engineers, refer to “Dispatcher,” in this chapter.

Call center engineer

Based on the parameters defined by the administrator, an internal user of the application is categorized as a call center engineer. The engineer must answer the query specified in the service request.

A call center engineer can do the following:

- View all the assigned service requests.
- Solve the service requests.
- Cancel the service requests.
- Attach files or folders to the service request to provide a solution.
- View the concluded service requests.
- Assign the service requests to self.

All the functions available to the call center engineer are described in detail in the following sections of this chapter.

Engineer Overview

The call center engineer must use the **Engineer-Overview** option on the E-Service menu to access the service requests page to view all the assigned service requests:

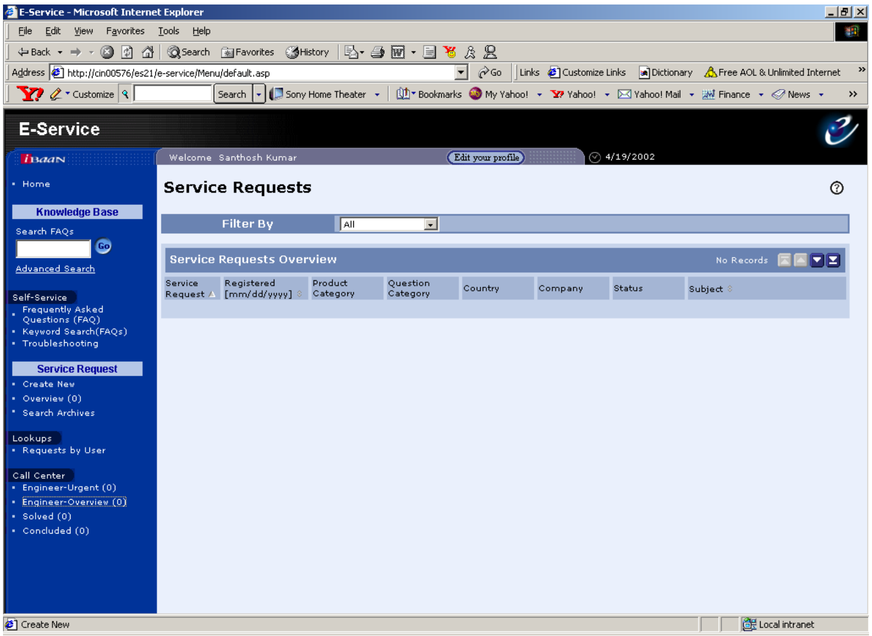

Figure 4-10 Engineer Overview page

The Service Request page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Status	View the service requests with the following status: ▪ Assigned ▪ In hand ▪ Reopened ▪ Waiting (Internal Reasons) ▪ Waiting (External Reasons) ▪ Clarified
Subject	View the subject specified by the user to identify the service request.

Click on the hyperlink available for the service request number to perform the following actions on the service request:

- Take the service request In Hand.
- Cancel the service request.

Use the filters available on this page to sort the service requests on the basis of their status.

Select the status to view all the service requests:

- **All:**
  View all the service requests irrespective of status.
- **Assigned:**
  View all the service requests with the status Assigned.
- **In hand:**
  View all the service requests with the status In hand.

- **Reopened:**
  View all the service requests with the status Reopened.
- **Waiting (Internal Reasons):**
  View all the service requests that are awaiting internal clarification.
- **Waiting (External Reasons):**
  View all the service requests that are awaiting external clarification.
- **Clarified:**
  View all the service requests with the status Clarified.

Service Request Details

The engineer must use the hyperlink provided for the service request number on the Service Requests page to view the service request details:

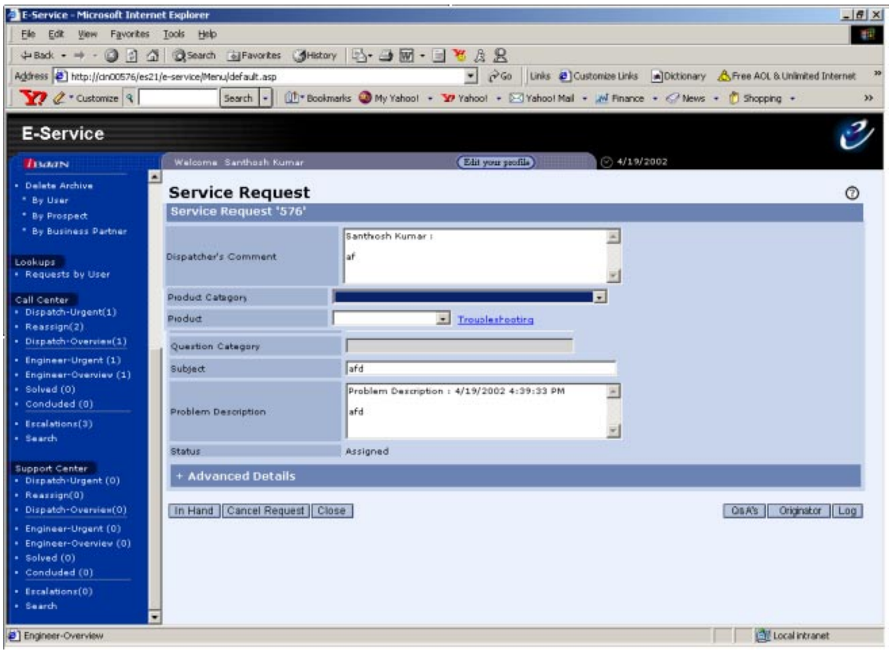

Figure 4-11 Service Request page

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

Fields	Description
Dispatcher’s Comment	View the comment added by the dispatcher to the service request. The **Dispatcher’s Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status Assigned.

If E-Service is integrated with Baan IVc4 in the back end, the engineer 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 an onsite visit.
- **Request for Onsite Visit:**
  View the option that is used to determine if you require an onsite visit by a service engineer to solve your problem.

If E-Service is integrated with iBaan ERP 5.0c in the back end, the engineer 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 have selected.
- **Serial Number:**
  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 that can be used to provide reference to the service provider.

The call center engineer can use the options available on this page to do the following:

- Click **In hand** to answer the service request.
- Click **Cancel Request** to cancel the service request.
- Click **Close** to go to the Service Request Overview page.
- Click **Q&A** to view the details of the problem and solutions related to the service request.
- Click **Originator** to view the details related to the users who created the service request.

- Click **Log** to view the transactions log related to the service request.

These options available to the call center engineer are described in detail in the following sections of this chapter.

Service request In Hand

The call center engineer must provide a solution to all the service requests that are In Hand.

- Click the **In Hand** option on the Service Request details page to access the page that shows the status of the service request as In Hand:

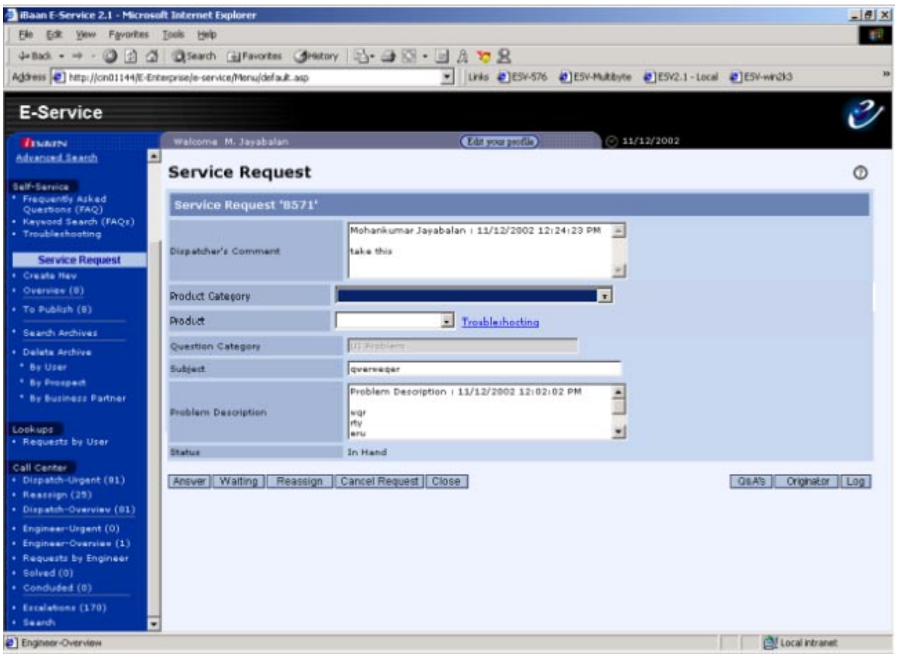

Figure 4-12 Service Request page

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

Fields	Description
Dispatcher's Comment	View the comment added by the dispatcher to the service request. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status In Hand

The call center engineer can use the options available on this page to do the following:

- Click **Answer** to provide a solution to the service request.
- Click **Waiting** to seek clarification either from the user who created the service request or from another internal source.
- Click **Reassign** to assign the service request to another engineer.
- Click **Cancel Request** to cancel the service request.
- Click **Close** to go to the Service Request overview page.
- Click **Q&A** to view the problem and solutions detail related to the service request.
- Click **Originator** to view the details of the user who created the service request.
- Click **Log** to view the transactions log related to the service request.

To answer the service request

The call center engineer must provide a solution to the service request with the status In Hand. Use the **Answer** option available in the Service Request with the Status In Hand page to access the Solve Service Request page:

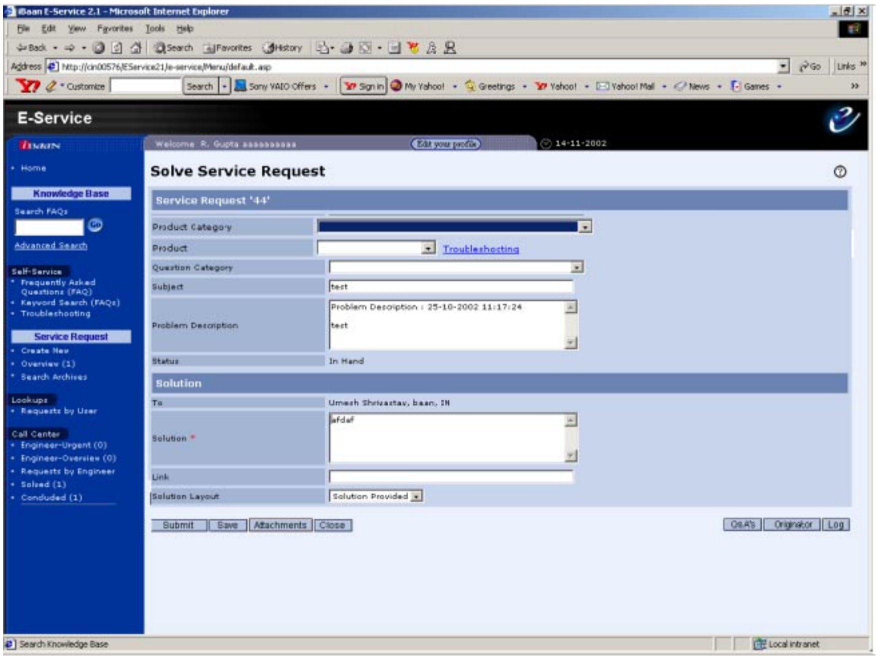

Figure 4-13 Solve Service Request page

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

Fields	Description
Dispatcher's Comment	View the comment added by the dispatcher to the service request. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status In Hand

The call center engineer must provide the following details in the **Solution** group box:

Fields	Description
To	View the name of the user to whom the solution must be sent.
Solution	Enter the detailed solution.
Solution Layout	Select the mail format layout. A value in this field is mandatory to submit the solution.

The call center engineer can use the options available on this page to do the following:

- Click **Submit** to submit the solution.
- Click **Save** to save the solution.
- Click **Attachments** to add attachments to the service request.
- Click **Close** to go to the Service Request overview page.

Solution preview

The call center engineer can view the solution preview before the solution is actually sent to the user who created the service request.

To view the solution preview, the call center engineer must click the **Submit** option on the Solve Service Request page:

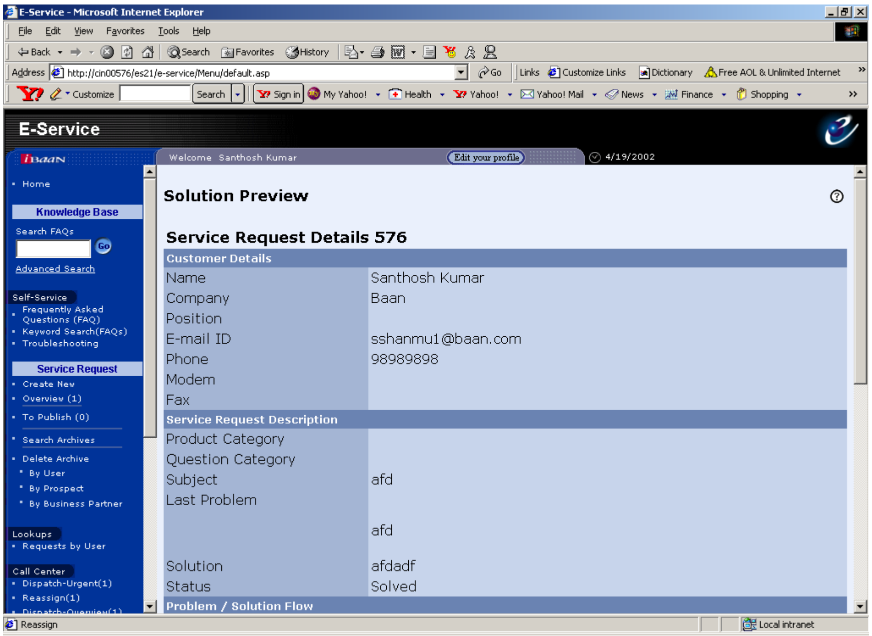

Figure 4-14 Solution Preview page

You can view the following details in the customer and the service request on this page:

- Name
- Company
- Position
- E-mail address
- Phone
- Modem
- Fax
- Product Category
- Question Category
- Subject

- Last Problem
- Solution
- Status

Click **Submit** to send the solution to the user who created the service request. The status of the service request changes to Solved.

To add attachments

This section describes the procedure used to add attachments to the service request. The call center engineer can add attachments to the service request to better describe the solution.

Click the **Attachments** option on the Solve Service Request page to add attachments to the service request. The attachments can be in any file format. You can use the Attachments page to attach any number of attachments to the service request:

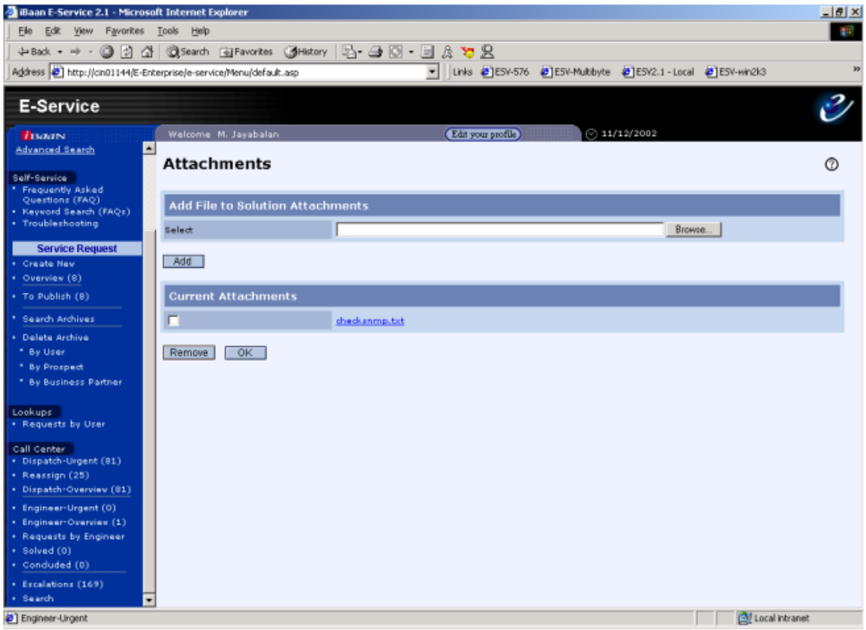

Figure 4-15 Attachments page

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 more attachments to the service request.

Select the check box that corresponds to the attachment and click **Remove** to remove the attachment from the service request. You must remove the service request only before you submit the request. After you submit the service request, you can no longer modify the existing attachments. However, you can add more attachments and then resend the service request.

Click **OK** on the Attachments page to go back to the Solve Service Request page.

Solved service request

The call center engineer must use the **Solved Service Request** option on the E-Service menu to view all the service requests with the status Solved:

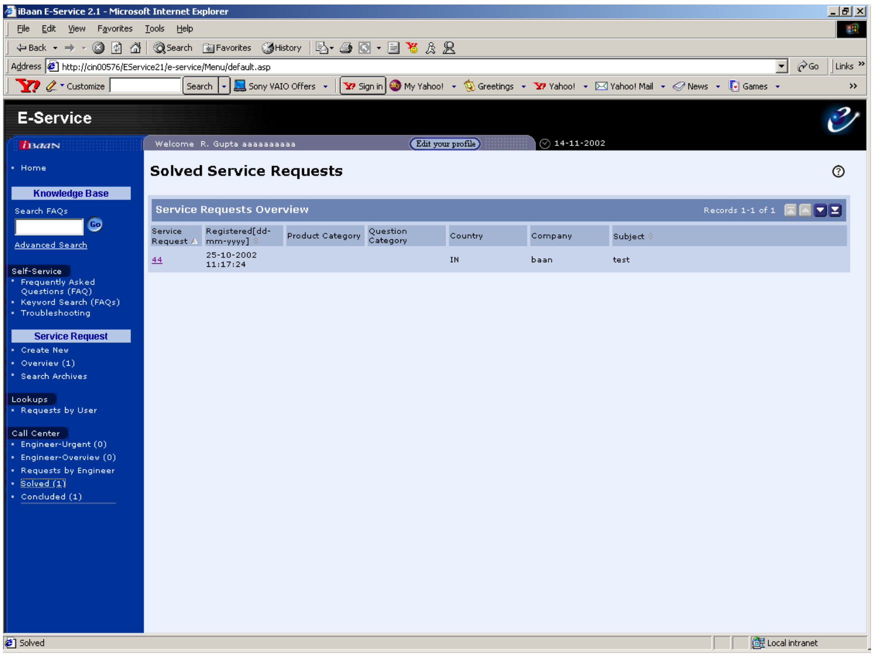

Figure 4-16 Solved Service Request page

The Service Request page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Subject	View the subject specified by the user to identify the service request.

Click the hyperlink available for the service request number to view not only the service request details, but also the solution details.

The call center engineer can view the following details related to the solved service request on the Service Request page:

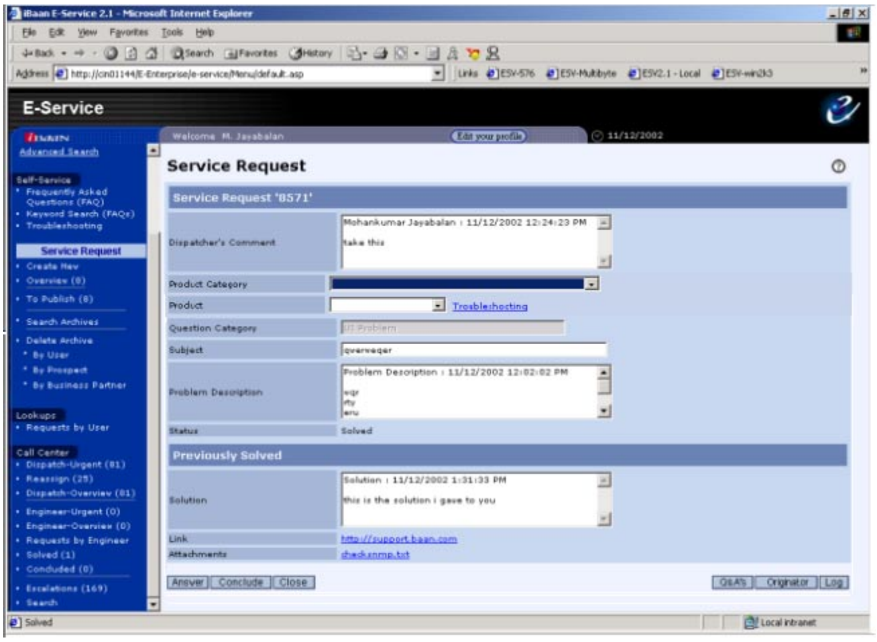

Figure 4-17 Service Request page

The Service Request page provides the following details related to a service request:

Fields	Description
Dispatcher's Comment	View the comment added by the dispatcher to the service request. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status Solved.

View the following details in the **Previous Solved** group box:

Fields	Description
Solution	View the solution details.
Attachments	View the attachments added by the call center engineer to provide a solution to the service request.

The options available on this page enable the call center engineer to do the following:

- Click **Answer** to provide an answer the service request once again.
- Click **Conclude** to conclude the service request. The status of the service request changes to Concluded.
- Click **Close** to go back to the Solved Service Request overview page.
- Click **Q&A** to view the problem and solutions detail related to the service request.

- Click **Originator** to view the details of the user who created the service request.
- Click **Log** to view the transactions log related to the service request.

Additional solution to service request

The call center engineer must use the **Answer** option on the Solved Service Request details page to provide an additional solution to the service request:

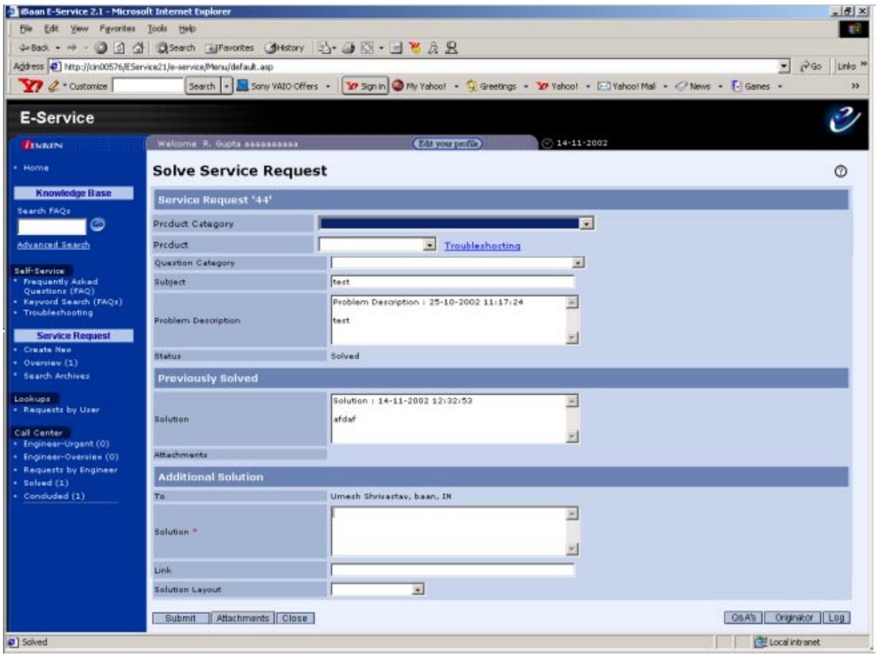

Figure 4-18 Solve Service Request page, Additional solution

The Solved Service Request page provides the following details related to a service request:

Fields	Description
Dispatcher's Comment	View the comment added by the dispatcher to the service request. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status Solved.

The call center engineer must enter the following details to provide a solution to the service request:

Fields	Description
To	The name of the user who created the service request.
Solution	Enter the solution details.
Solution Layout	Select the solution layout.

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

- Click **Submit** to view the solution preview
- Click **Attachments** to add attachments to the service request.
- Click **Close** to go to the Solved Service Request overview page.
- Click **Conclude** to conclude the service request. The status of the service request changes to Concluded.

Engineer Urgent

The call center engineer must use the **Engineer - Urgent** option available on the E-Service menu to view all the service requests to which solution must be provided immediately.

Based on the parameters defined by the administrator, all the service requests to which the engineer must provide a solution move to the engineer Urgent status after a specified period.

The service requests that the engineer can view by using the Engineer - urgent option on the E-Service menu are also available by using the **Engineer - Overview** option.

The procedure used to provide a solution to the service requests in the Engineer - Urgent state is similar to the procedure used to provide a solution to a normal service request.

For more details of the procedure used to provide a solution to the service request, refer to “Engineer Overview,” “Service Request Details,” “Service Request In Hand,” “To Answer the Service Request,” and “Solution Preview” in this chapter.

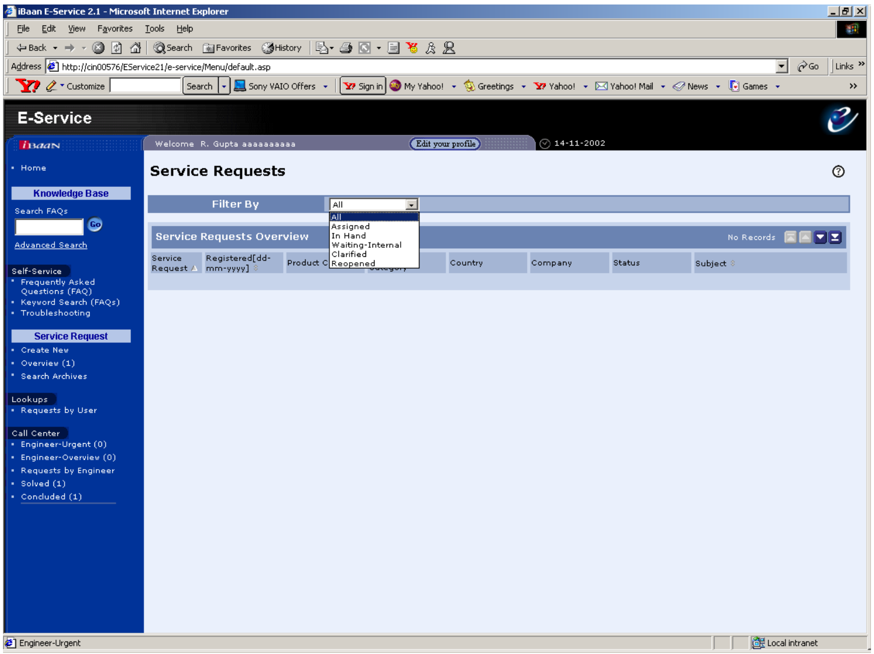

Figure 4-19 Service Requests page, engineer – urgent

The Service Request page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Status	View the service requests with the following status: ▪ Assigned ▪ In hand ▪ Reopened ▪ Waiting (Internal Reasons) ▪ Clarified
Subject	View the subject specified by the user to identify the service request.

Click on the hyperlink available for the service request number to perform the following actions on the service request:

- Take the service request In Hand
- Cancel service request

Use the filters available on this page to sort the service requests on the basis of their status.

Select the status to view all the service requests:

- **Assigned :**
  View all the service requests with the status Assigned.
- **In hand:**
  View all the service requests with the status In hand.
- **Reopened:**
  View all the service requests with the status Reopened.

- **Waiting (Internal Reasons):**
  View all the service requests which are waiting for internal clarification.
- **Clarified:**
  View all the service requests with the status Clarified.

Concluded service request

The call center engineer must use the **Concluded** option on the E-Service menu to view the service requests with the status Concluded:

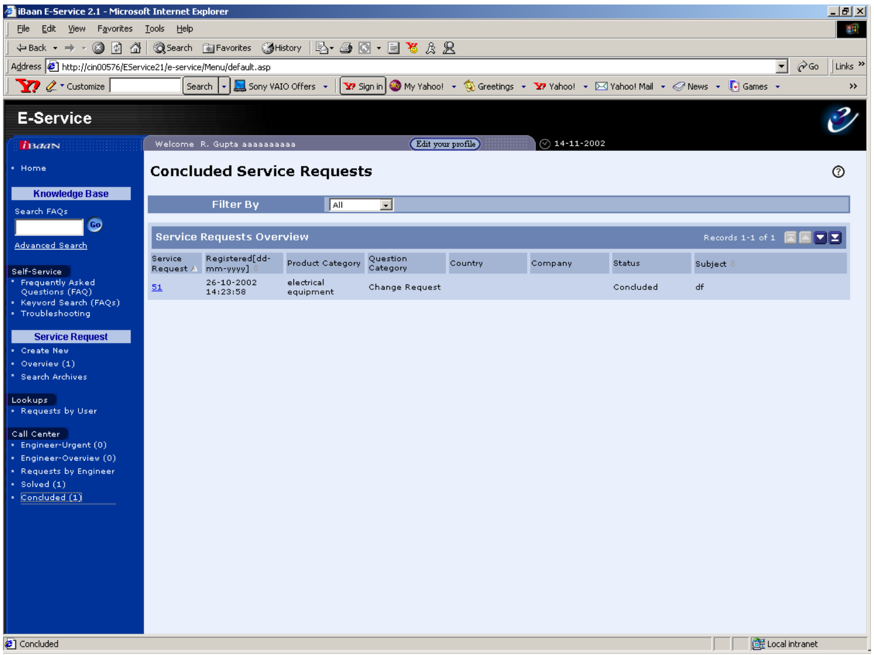

Figure 4-20 Concluded Service Request page

The Service Request page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Status	View the service requests with the following status: ▪ Concluded ▪ Accepted
Subject	View the subject specified by the user to identify the service request.

Use the filters available on this page to sort the service request on the basis of the following:

- **All:**
  Select this option to view all the service requests, irrespective of status:
- **Concluded**:
  Select this option to view all the service requests with the status Concluded.
- **Accepted**:
  Select this option to view all the service requests with the status Accepted.

Click on the hyperlink available for the service request number to view the service request details that can be sent to the publisher:

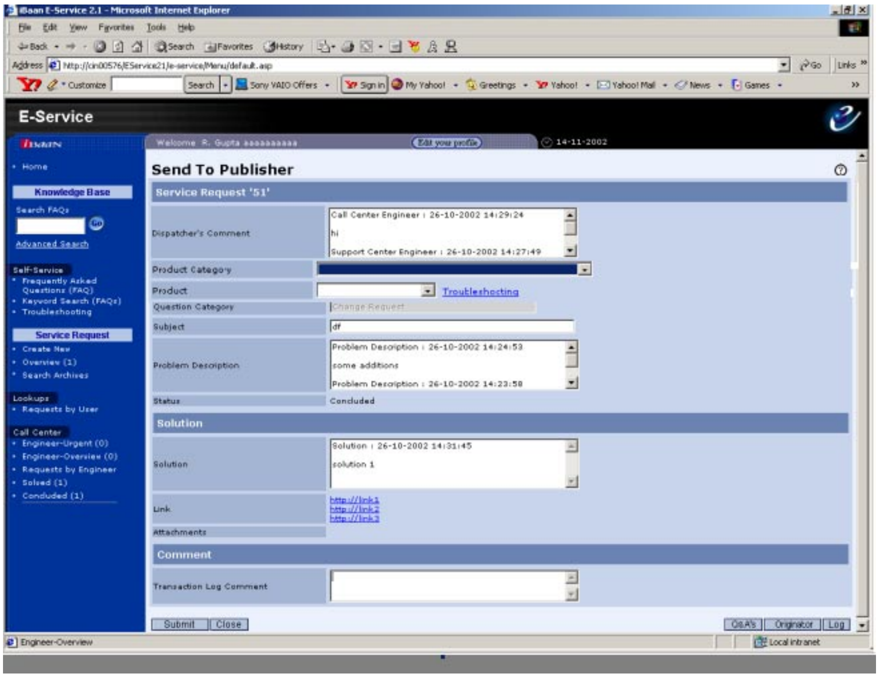

Figure 4-21 Send to Publisher page

The Send to Publisher page provides the following details related to a service request:

Fields	Description
Dispatcher's Comment	View the comment given by the dispatcher to the service request before transferring it to the call center engineer. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user to create a service request.
Problem Description	View the detailed description of the problem.
Status	View the status of the service request. In this case, the status is Concluded or Accepted.

View the following details related to the solution provided by the call center engineer on this page:

Fields	Description
Solution	View the solution details.
Link	View the link provided to a Web site.
Attachments	View the attachments linked by the call center engineer to provide a solution to the service request.

View the following details related to the comment on this page:

Fields	Description
Transaction Log Comment	Enter a comment.

This page provides the following options:

- Click **Submit** to send the service request to the publisher.
- Click **Close** to go to the Concluded Service Requests Overview page.

Cancel Service Request

This section describes the procedure the call center engineer uses to cancel a service request.

Use the **Cancel Request** option on the Service Request Details page to cancel the service request:

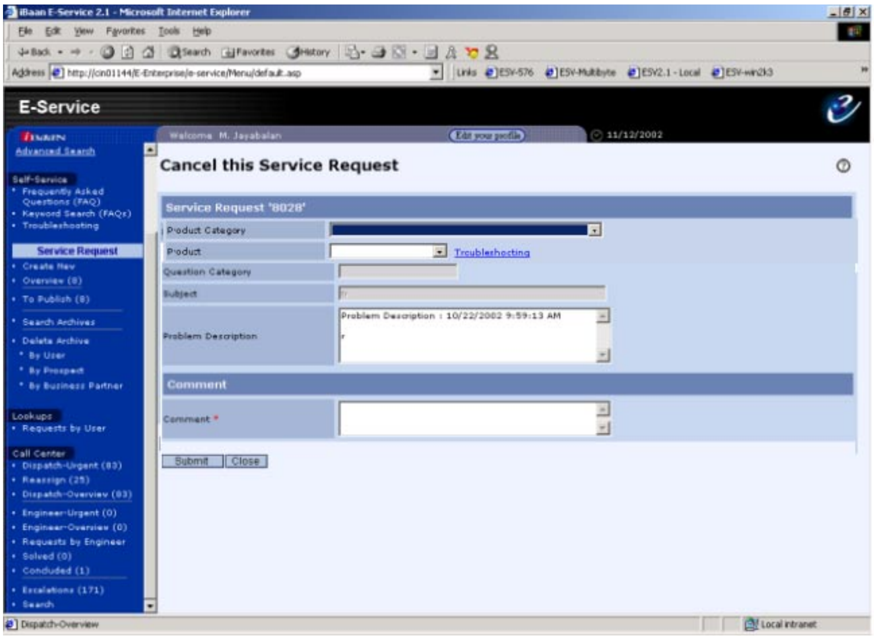

Figure 4-22 Cancel this Service Request page

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

Fields	Description
Dispatcher's Comment	View the comment added by the dispatcher to the service request. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Cancel reason	Enter a reason required to cancel the service request.
Status	View the service requests with the status Assigned. The service request can be in any other status, however, the service request interface changes based on the status.

The call center engineer can use the options available on this page to do the following:

- Click **Submit** to cancel the service request. The status of the service request changes to Cancelled.
- Click **Attachments** to view the attachments.
- Click **Close** to go to the Service Request Overview page.

Requests by Engineer

This section describes the procedure the call center engineers use to assign service requests. The call center engineer must use the **Requests by Engineer** option to select a specific call center engineer and view all the service requests that are In Hand for the selected CCE.

Select the **Requests by Engineer** option to view the following page:

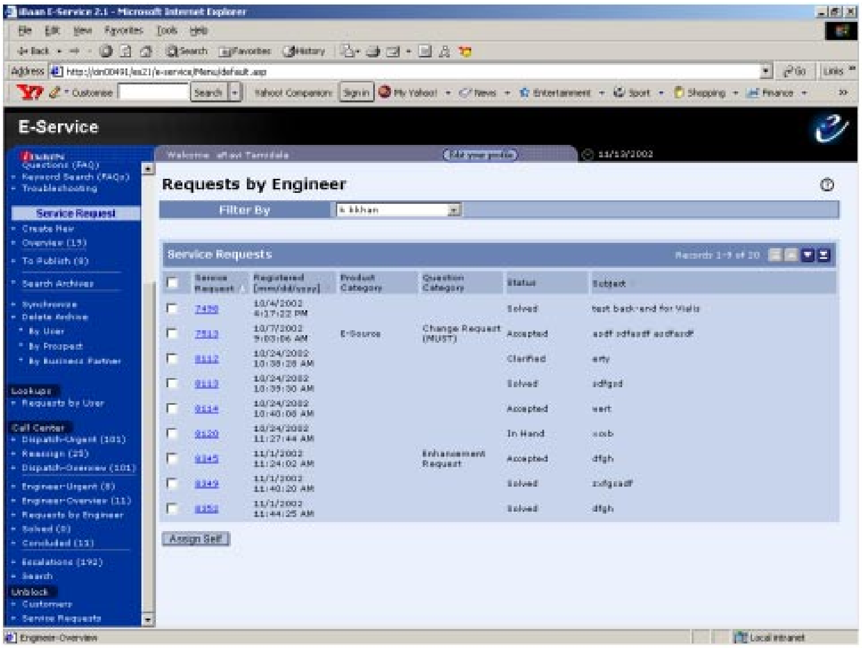

Figure 4-23 Requests by Engineer page

The Requests by Engineer page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Status	View the service requests with the following status: ▪ Assigned ▪ In hand ▪ Reopened ▪ Waiting (Internal Reasons) ▪ Waiting (External Reasons) ▪ Clarified
Subject	View the subject specified by the user to identify the service request.

Select the check box that corresponds to the service requests and click **Assign Self** to reassign the service request to yourself. The call center engineer can take the required action related to the service request.

The call center engineer can also view the details of the service request that is already assigned to another call center engineer by using the hyperlink provided for the service request ID on the Service Request page:

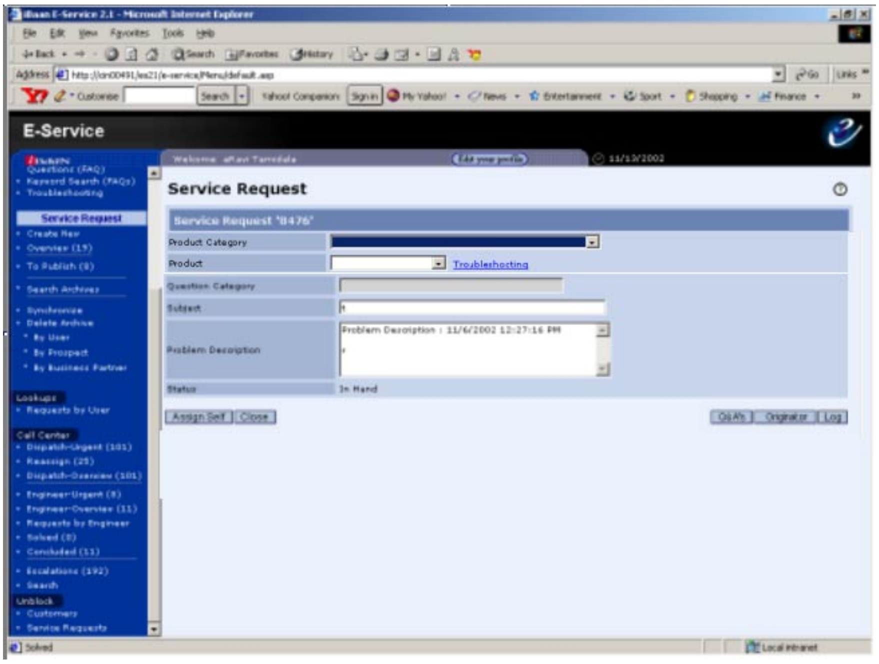

Figure 4-24 Service Request page

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

Fields	Description
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status Assigned.

If E-Service is integrated with Baan IVc4 in the back end, the engineer 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 an onsite visit.
- **Request for Onsite Visit:**
  View the option that is used to determine if you require an onsite visit by a service engineer to solve your problem.

If E-Service is integrated with iBaan ERP 5.0c in the back end, the engineer 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 have selected.
- **Serial Number:**
  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 that can be used to provide reference to the service provider.

This page provides the following options:

- Click **Assign Self** to reassign the service request that is already assigned to another call center engineer to self.
- Click **Close** to go to the Requests by Engineers page.

Support agent

Based on the user role assigned by the administrator, an internal user can be classified as a support agent.

Support agents can create a service request either on behalf of a registered user or a guest user or for themselves.

This section describes the procedure used to create a service request by the support agent:

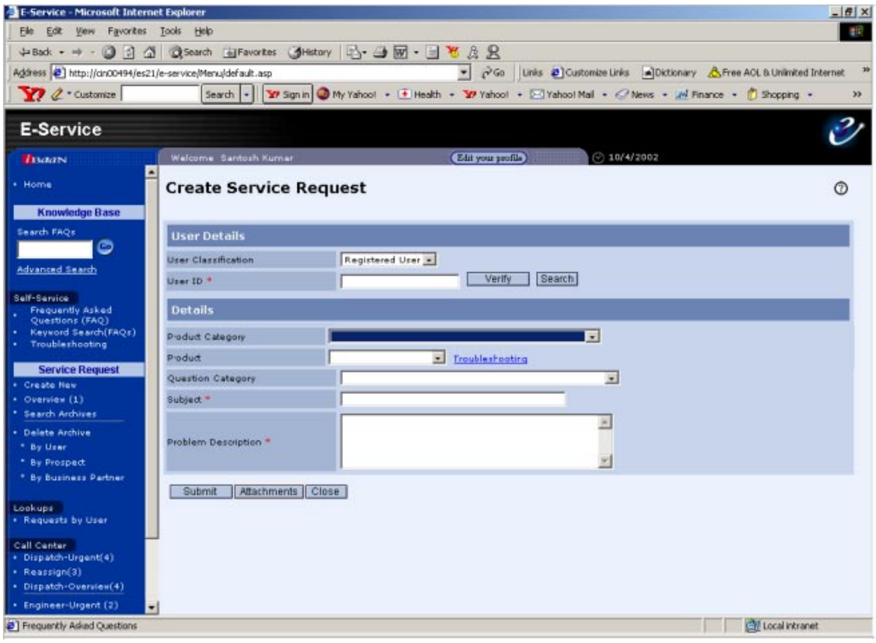

Figure 4-25 Create Service Request page

To create a service request on behalf of a registered user the support agent must enter the following user details on the Create Service Request page:

- **User Classification**:
  Select the **Registered User** or **Guest User** option in this field to create a service request on behalf of a registered user.
- **User ID**:
  Enter the user ID assigned to the registered user. Click **Verify** to authenticate the user ID.

Use the **Search** option to locate the required registered user's user ID. The procedure used to search for the user ID is described in "Callers information" and "Select business partners," later in this chapter.

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

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

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

- **Site:**
  Select the site code.
- **Installation:**
  Select the Installation code.
- **Problem Code:**
  Select 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:**
  Select the problem priority code.
- **Reference:**
  Select the text that can be used to provide reference to the service provider.
- **Preferred Start Date:**
  Select the end user's preferred start date for an onsite visit.
- **Request for Onsite Visit:**
  View the option that is used to determine if you require an onsite visit by a service engineer to solve your problem.

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

- **Site:**
  Select the site code.
- **Installation:**
  Select the installation code.
- **Installation Number:**
  The installation number appears by default based on the installation code you have selected.
- **Serial Number:**
  The serial number appears by default based on the installation code you have selected.
- **Problem Code:**
  Select 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:**
  Select the problem priority code.
- **Reference:**
  Select the text that can be used to provide reference to the service provider.

Attachments:

The support agent can add attachments to the service request to better describe the problem. Click the **Attachments** option to add attachments to the service request. The attachments could be in any file format. You can attach any number of attachments to the service request by using the Attachments page:

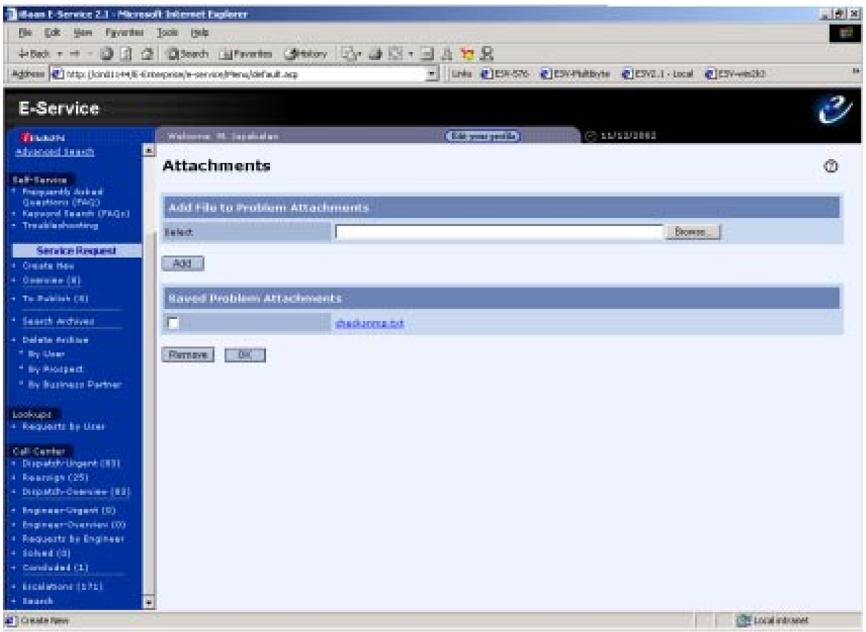

Figure 4-26 Attachments page

1 Click **Browse** to select the required file or folder, which 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 more attachments to the service request.

- Select the check box that corresponds to the attachment and click **Remove** to remove the attachment from the service request. You must remove the service request only before you submit the request. After you submit the service request, you can no longer modify the existing attachments. However, you can add more attachments and then resend the service request.
- Click **Close** on the Attachments page to go back to the Create Service Request page.

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

When you submit a service request, the following Thank You page appears.

EXAMPLE

The following page appears when the support agent creates a service request on behalf of a guest user or a prospect:

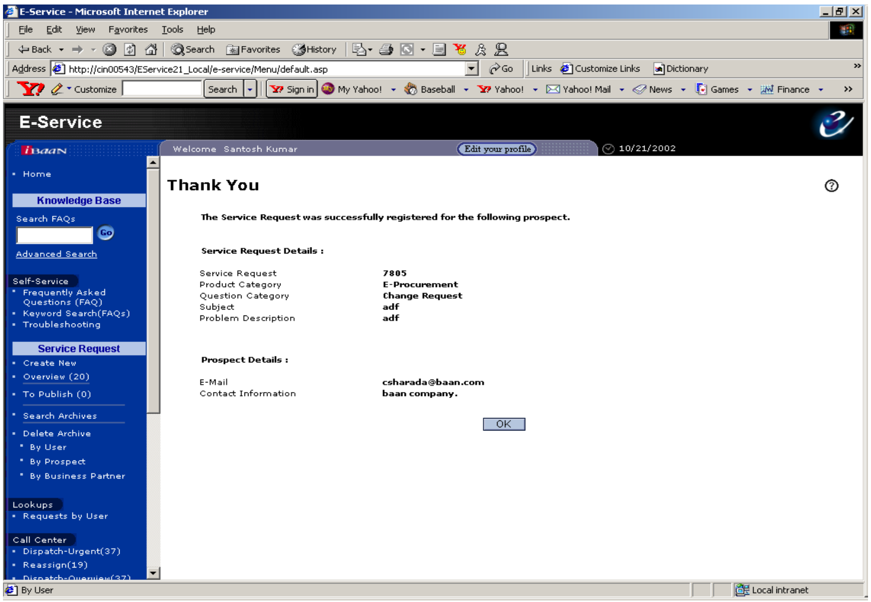

Figure 4-27 Submit Service Request on Behalf of a Guest User page

This page provides the following details:

Service Request Details:

- Service Request: The service request identification code.
- Product Category: The category to which the product belongs.
- Product: The name of the product.
- Question Category: The category to which the question belongs.
- Subject: The subject of the service request.
- Problem Description: The problem description specified in the service request.

Prospect Details:
- E-mail.
- Contact Information.

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

Verify user details

The support agent must use the **Verify** option on the Create Service Request page. Enter a user ID and click **Verify** to authenticate the user:

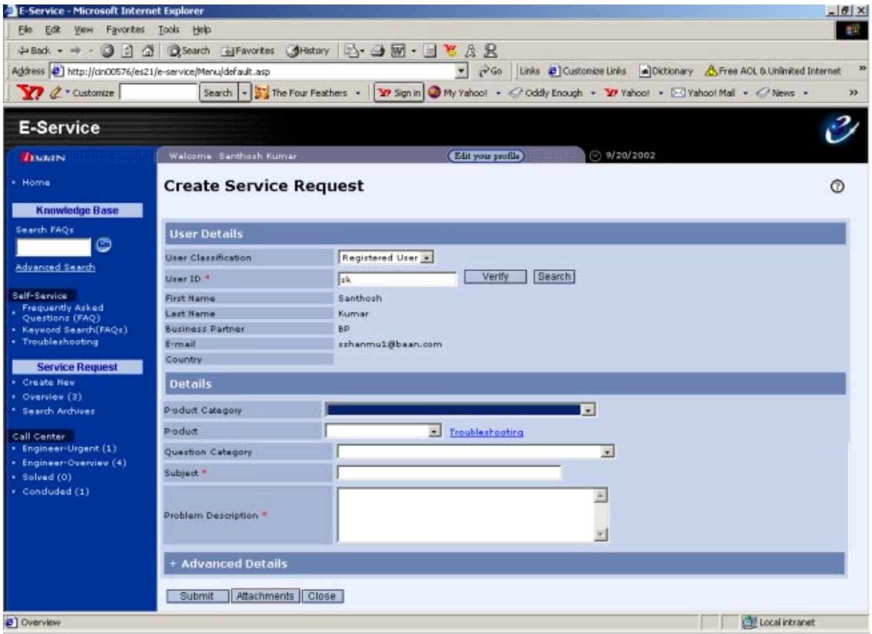

Figure 4-28 Create Service Request page, verify user details

The following user details appear on this page:

- **First Name**:
  View the user's first name.
- **Last Name**:
  View the user's last name.
- **Business Partner**:
  View the business partner to which the user belongs.
- **E-mail**:
  View the user's e-mail address.

- **Country**:
  View the country to which the user belongs.

Callers Information

To search for user details, the support agent can use the **Search** option on the Create Service Request page.

- Click **Search** to access the Caller's Information page:

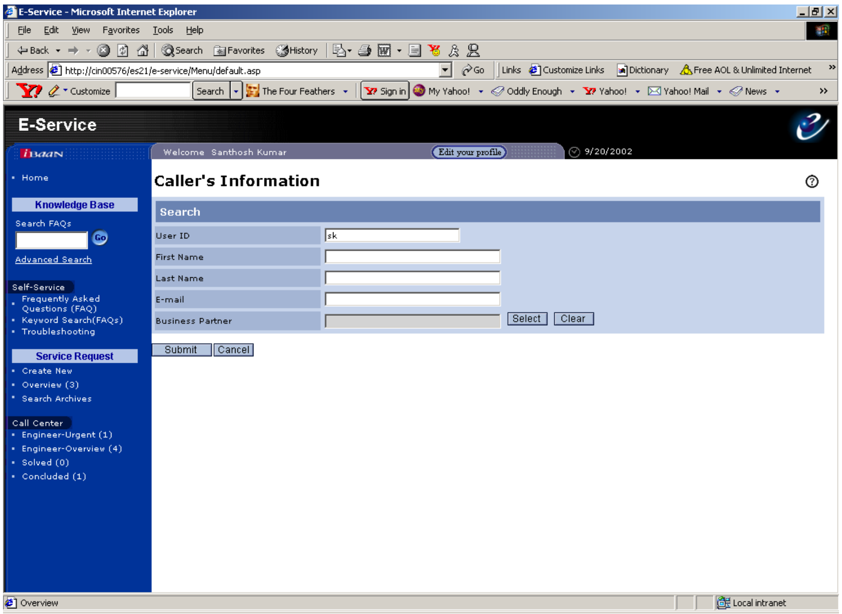

Figure 4-29 Caller's Information page

- Enter a value in either one or more fields to search for the required user.

Fields	Description
User ID	Enter the unique identification code assigned to the user to access the application.
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
E-mail	Enter the user's e-mail address.
Business Partner	Select the business partner to which the user belongs.

- Click **Submit** to search for the user ID on the basis of one or more search criteria.
- Click **Cancel** to go to the Create Service Request page:

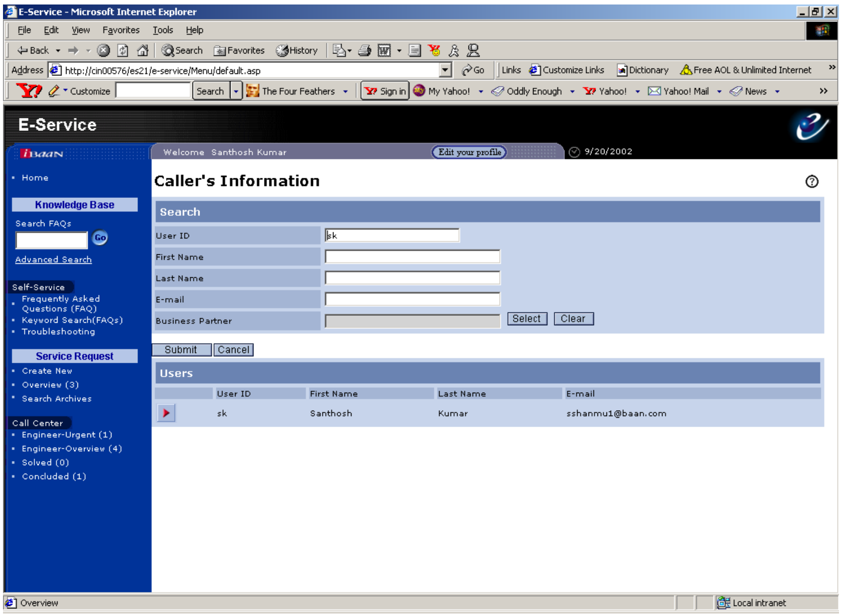

Figure 4-30 Caller's Information results page

- Click **Submit** to view the search results.

View the following details related to a user on this page:

- **User ID**:
  View the user ID assigned to the user.
- **First Name**:
  View the user's first name.
- **Last Name**:
  View the user's last name.
- **E-mail**:
  View the user's -mail address.

Click the icon that corresponds to the user ID to add the user to the Create Service Request page.

Select Business Partner

The support agent can use the **Select Business Partner** option on the Callers Information page to view a list of all the business partners:

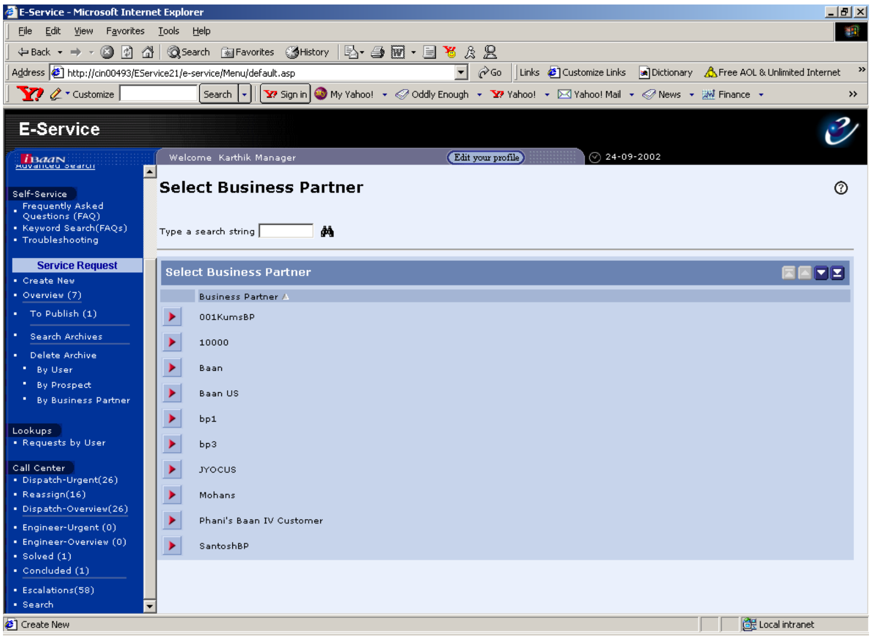

Figure 4-31 Select Business Partner page

The Select Business Partners page provides the following details:

- **Business Partner**:
  The business partner identification code appears in this field.

Select the icon that corresponds to the business partner code to select the business partner, on the basis of which you can search for the required user on the Caller's Information page.

Supervisor

Based on the user role assigned by the administrator, an internal user of the application can be classified as the supervisor.

The supervisor can do the following:

- View the call center escalations
- Search for all the service requests
- Delete the service request archives.

The following sections describe in detail the functions of the supervisor:

Call center escalations

The supervisor can use the **Escalations** option on the E-Service menu to view a list of all the service requests that must be immediately assigned to the call center engineer. Based on the parameters defined by the administrator, the service requests automatically reach the Escalations status after a specific duration:

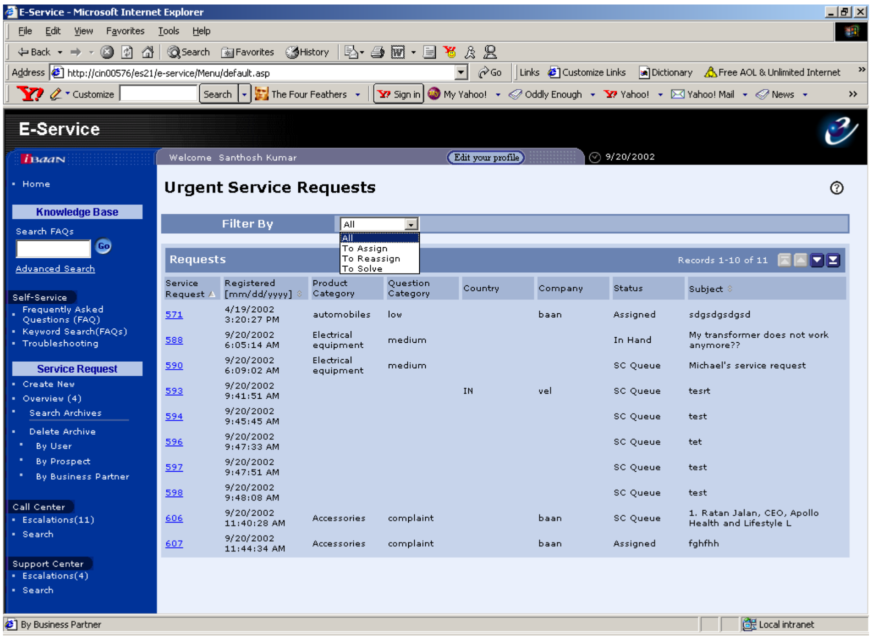

Figure 4-32 Urgent Service Requests page

The Urgent Service Request page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Status	View the service requests with the following status: ▪ Assigned ▪ In hand ▪ Reopened ▪ Waiting (Internal Reasons) ▪ Waiting (External Reasons) ▪ Clarified
Subject	View the subject specified by the user to identify the service request.

Click on the hyperlink available for the service request number to view the service request details.

Service request search

The supervisor must use the **Service Request Search** option to locate a service request based on either one or more criteria specified on the Service Request Search page:

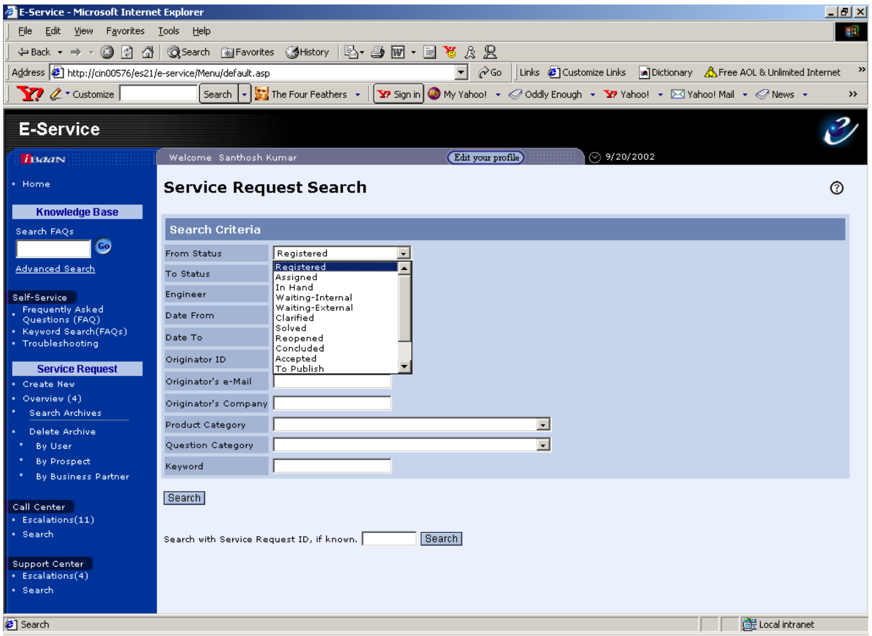

Figure 4-33 Service Request Search page

Specify either one or more options required to search for the service request.

Fields	Description
From status	Select one of the following status of the service request: ▪ Registered ▪ Assigned ▪ In Hand ▪ Waiting Internal ▪ Waiting External ▪ Clarified ▪ Solved ▪ Reopened ▪ Concluded ▪ Accepted ▪ To Publish
To Status	Options in this field are similar to that of the statuses available in the **From Status** field.
Engineer	Enter the engineer details.
Date from	Select the date from which you must start the search.
Date to	Select the date up to which you must search.
Originator ID	Enter the identification code assigned to the user.
Originator's E-mail	Enter the user's e-mail address.
Originator's company	Enter the company to which the user belongs.
Product category	Select the category to which the product belongs.
Question Category	Select the category to which the question belongs.
Keyword	Enter the keyword used to search for the service request.

Click **Search** to view the service request search results:

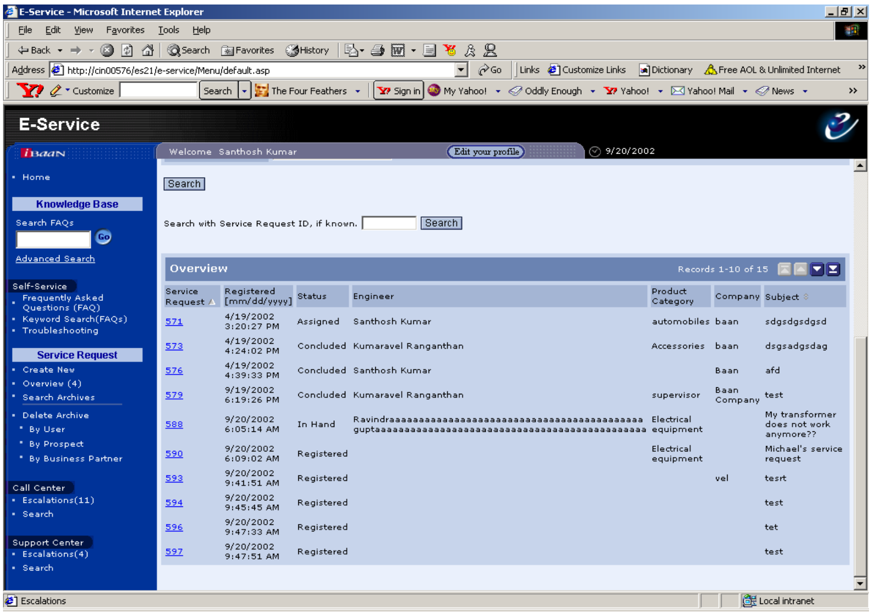

Figure 4-34 Search results

The Service Request page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Status	View the service requests status.
Subject	View the subject specified by the user to identify the service request.

Click on the hyperlink available for the service request number to view the service request details.

Delete archives

The supervisor can delete the archives on the basis of the user, guest user, or business partner

You can delete archives automatically or manually. The administrator must define the architecture to automatically delete the service requests after a specify duration as archives.

The supervisor can manually delete the archives based on the procedures described in the following sections of this chapter.

Use the Delete Archive of User page to delete the archives that belong to a specific user:

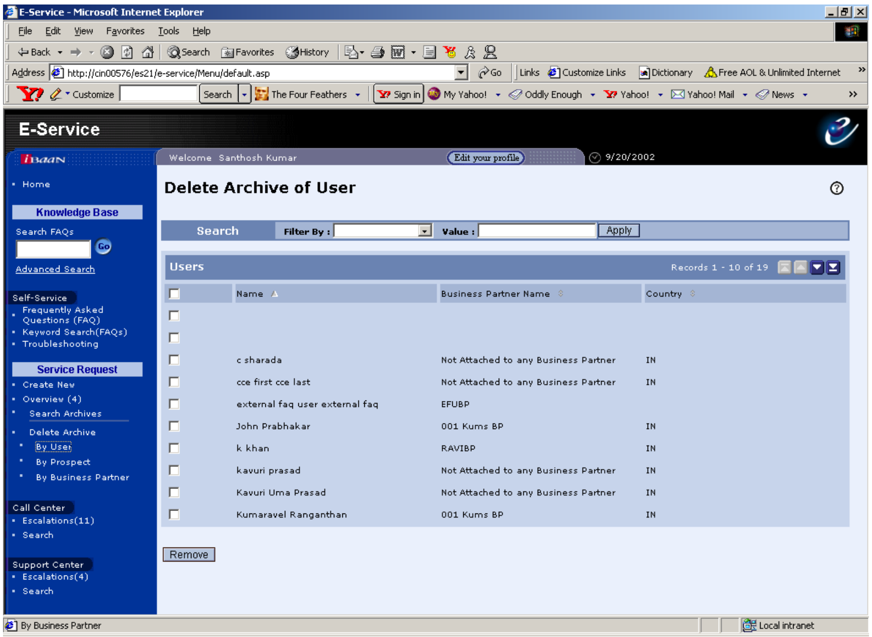

Figure 4-35 Delete Archive of User page

The Delete Archive of User page provides the following details related to a user:

- Name: View the user's name.
- Business Partners Name: View the business partner's name.
- Country: View the country to which the user belongs.

Select the check box to delete the service requests that belong to a specific user.

The supervisor must use the Delete Archive of Prospect page to delete the archived service requests of the prospects:

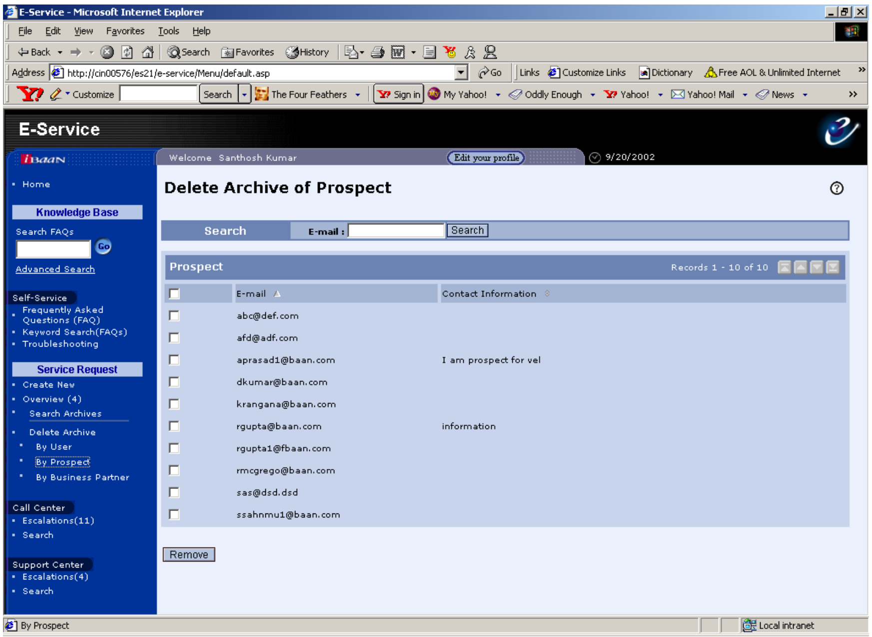

Figure 4-36 Delete Archive of Prospect page

View the following details in the delete archive of prospect page:

- E-mail: view the e-mail address of the guest user.
- Contact Information: View the contact information of the guest user.

Select the check box that corresponds to the e-mail and click **Remove** to delete all the archived service requests created by the guest users.

To delete the archived service requests on the basis of the business partner, the supervisor must access the Delete Archive of Business Partner page:

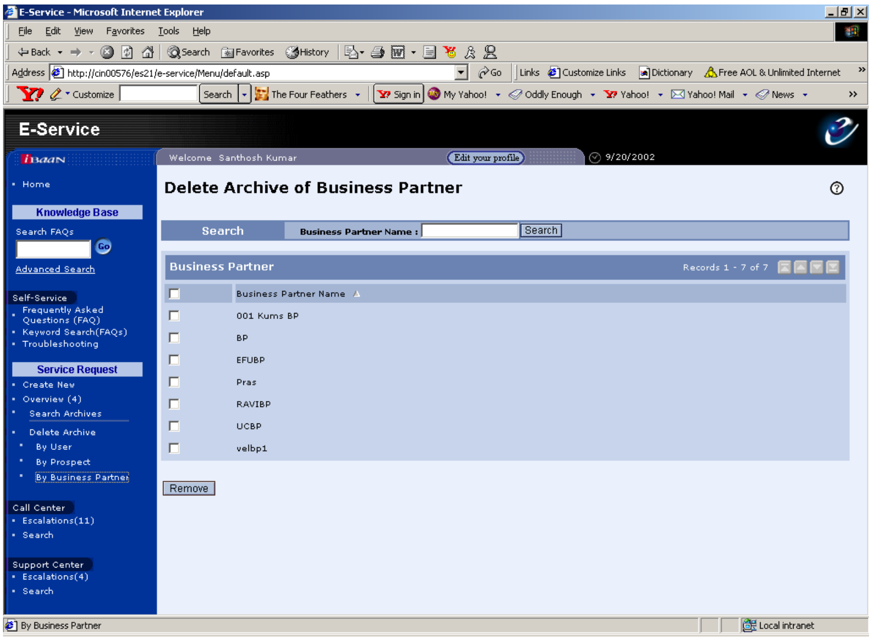

Figure 4-37 Delete Archive of Business Partner page

Select the check box that corresponds to the business partner name and click **Remove** to delete all the archived service requests related to a business partner. Archived service requests created by the users linked to the business partners are also deleted.

Publisher

Based on the parameters defined by the administrator, an internal user of the application is categorized as a publisher. The publisher edits and publishes the service requests as FAQs in the FAQs database.

A publisher can do the following:

- View all the service requests that can be published as FAQs.
- Publish the service requests

Service requests to publish

The publisher must use the **To Publish** option on the E-Service menu to access the Service Requests to Publish page. This page displays a list of all the service requests that can be published as FAQs:

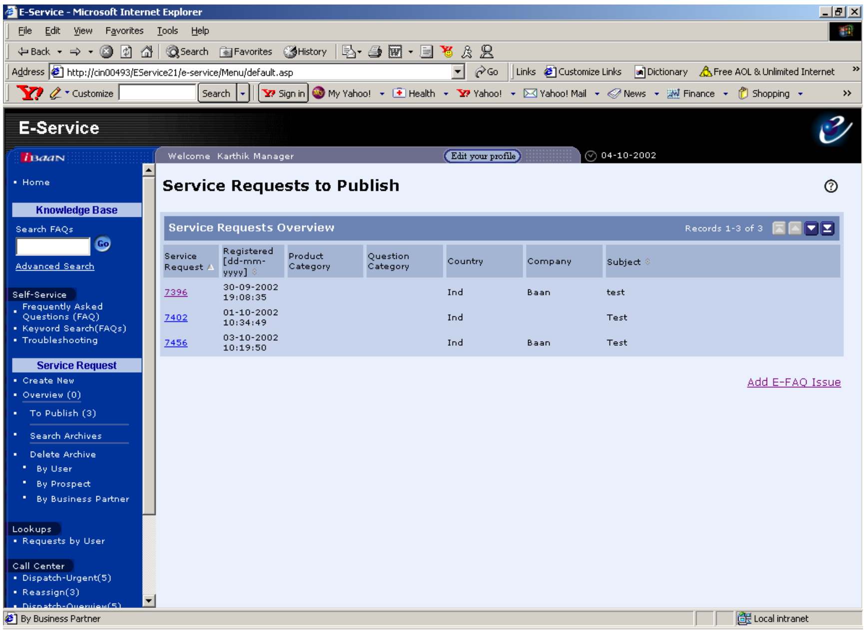

Figure 4-38 Service Requests to Publish page

The publisher can view the following details related to a service request on this page:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Subject	View the subject specified by the user to identify the service request.

Click on the service request ID to access the Publish to FAQs page.

Publish to FAQ - details

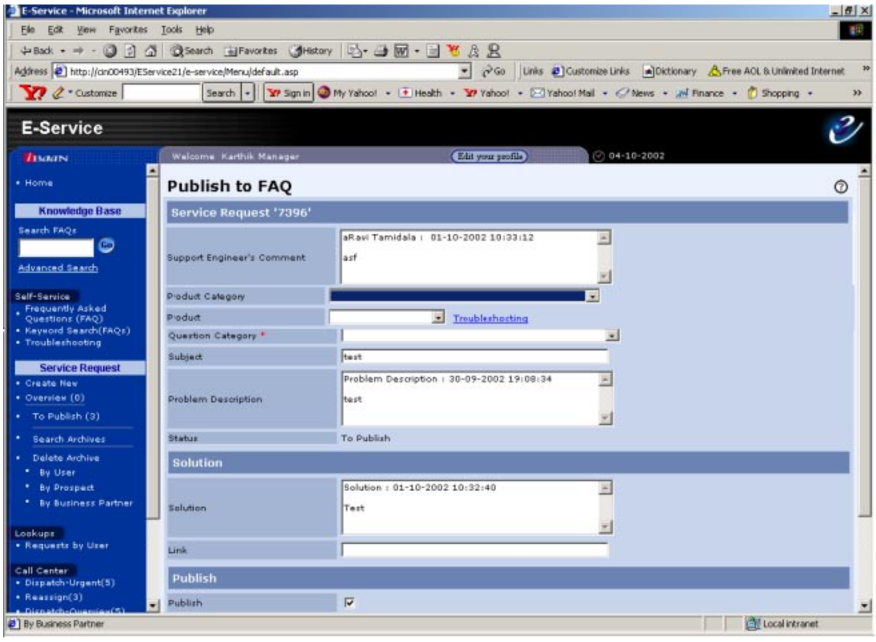

Figure 4-39 Publish to FAQ page

The Publish to FAQ page displays the following details related to a service request:

Fields	Description
Engineer's Comment	View the comment added by the engineer to the service request.
Product category	View or enter the category to which the product belongs.
Product	View or select the product.
Question category	View or enter the category to which the question belongs.
Subject	View or enter the subject .
Problem Description	View or enter the detailed description of the problem.
Status	View the service request status.

The publisher can view the following details related to the solution provided to the service request:

Fields	Description
Solution	View or enter the solution details.
Link	View or enter the link to a Web site to provide more details related to the solution.

The publisher can add the following details to the service request.

Fields	Description
Publish	Select this check box to publish the service request as an FAQ.
Available To	Specify the visibilities in which the service request must be available as an FAQ.
Comment	Add a comment to the service request.

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

- Click **Submit** to publish the service request.
- Click **Attachments** to add attachments to the service request.
- Click **Cancel** to go back to the Service Request to Publish page.
- Click **Q&A** to view the problem and solutions detail related to the service request.
- Click **Originator** to view the details of the user who created the service request.
- Click **Log** to view the transactions log related to the service request.

5 E-Service integrated with iBaan ERP 5.0c

This chapter describes the role of the internal users when E-Service is integrated with iBaan ERP 5.0c in the back end.

The E-Service application in stand-alone mode provides normal help desk facility to the users. Integration with iBaan ERP 5.0c in the back end enables the service provider to provide advanced help desk functionality to the user. The advanced help-desk functionality is available in the form of the support center. The support center includes the internal users who can be classified as support center dispatchers, support center engineers, and support center supervisors.

This chapter describes the following:

- The service request process when E-Service is integrated with iBaan ERP 5.0c.
- The functions and features of the support center dispatcher.
- The functions and features of the support center engineer.
- The functions and features of the support center supervisor.
- The functions and features of the support agent

Service request process

This section describes the process flow of the service request when E-Service is integrated with ERP 5.0c in the back end. The process consists of the following steps:

1. The registered user logs on to the application to create a service request.
2. The user enters the details required to create and submit a service request.
3. The service request is assigned to a call center engineer, based on the dispatch rules applicable for the application.
4. If automatic dispatching is enabled, the service request is automatically assigned to the call center engineer.
5. If automatic dispatching is not enabled, the call center dispatcher must manually dispatch the service request to the call center engineer.
6. The call center engineer can either answer the query specified in the service request or transfer the service request to the support center to provide advanced help desk functionality to the user.

7 If the service request is transferred to the support center, the service request is in the support center queue and must be either automatically or manually assigned to the support center engineer.

8 If automatic dispatching is enabled for the support center, the service request is automatically assigned to the support center engineer based on some predefined weightage.

   Or:

   If automatic dispatching is not enabled, the support center dispatcher must manually assign the service request to the support center engineer.

   – The privileged user logs on to the application to create a service request.
   – The user enters the details required to create and submit a service request.
   – Based on the routing option defined for the privileged user, the service request is routed either to the call center or the support center.

NOTE For more details, refer to “Privileged user,” in Chapter 3, “Functions and features – Internal users.”

9 A call is created in the backend ERP in the Call Management module when the service request is assigned to the support center engineer.

10 The support center engineer takes the service request in hand. The status of the service request is In Hand.

11 The support center engineer can either solve the query specified in the service request or seek additional clarification from the user who created the service request.

   If the support center engineer seeks clarification from the user who created the service request, the status of the service request is Waiting (For External Reasons).

   If the support center engineer seeks clarification from another internal source, the status of the service request is Waiting (For Internal Reasons).

   If the user provides the required clarification to the support center engineer, the status of the service request is Clarified.

12 The support center engineer provides a solution to the service request. The status of the service request is Solved.

13 The user accepts the solution provided by the support center engineer. The status of the service request is Closed for end users. For internal users, the service request has the status Accepted.

14 The status of a service request can be concluded either manually or automatically. The support center engineer can manually concludes the service request. If the user does not respond within a specific duration after a solution is provided to the service request, the system automatically concludes the service request.

15 The support center engineer adds a comment to the Concluded or Accepted service request and sends the request to the publisher.

16 The service request is in the publisher's queue. The status of the service request is To Be Published.

17 The publisher edits the service request and publishes the request in the FAQs database. The status of the service request is Published.

18 The Closed, Published, and Cancelled service requests are archived at regular intervals.

If the application is integrated with iBaan ERP 5.0c, a call is created in the Call Management module:

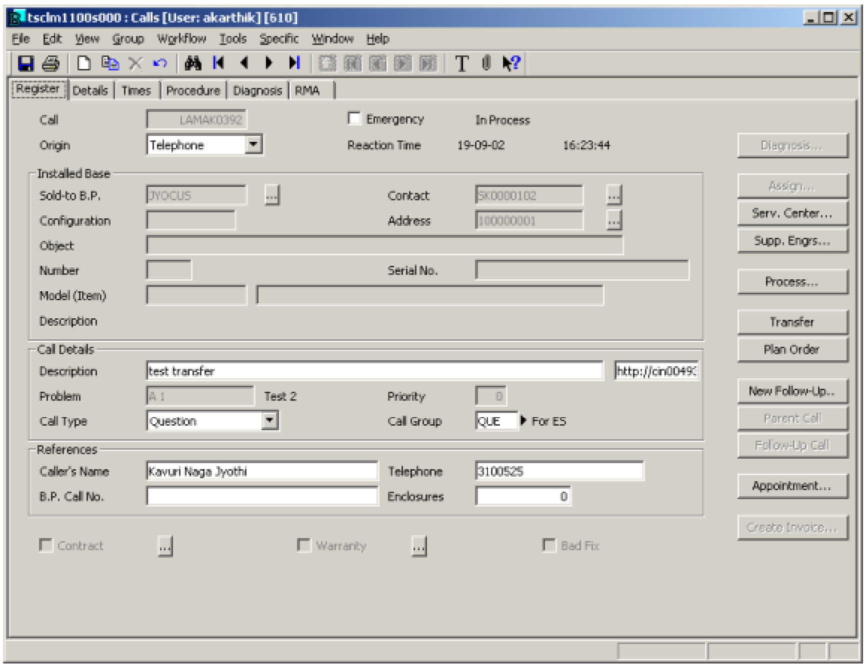

Figure 5-1 Calls (tschm1100s000)

The status of the service request is updated in this session in the following way:

Service Request Status	
Status in E-Service	**Status in iBaan ERP 5.0c**
Registered	
CCE Assign	
CCE In Hand	
SCE Assigned	Assigned
SCE In Hand	In Process
Waiting – Internal	In process - Waiting
Waiting – External	In process - Waiting
Clarified	In Process
Solved	In process
Accepted	Accepted
Reopened	In Process
Concluded	Solved
Cancelled	Solved

The support center engineer must use the E-Service application to process the service request.

Dispatcher

This section describes the functions and features available to the support center dispatcher. If the service request is not automatically assigned to the support center engineer based on the dispatch rules, the dispatcher must manually assign the service request to the support center engineer.

An internal user of the application, with the role of a dispatcher can do the following:

- View an overview of the service requests
- Assign the service requests to the support center engineers.
- Cancel a Service Request
- Reassign the service request

Dispatcher overview

The dispatcher can view a list of all the service requests that must be dispatched to the support center engineers on this page:

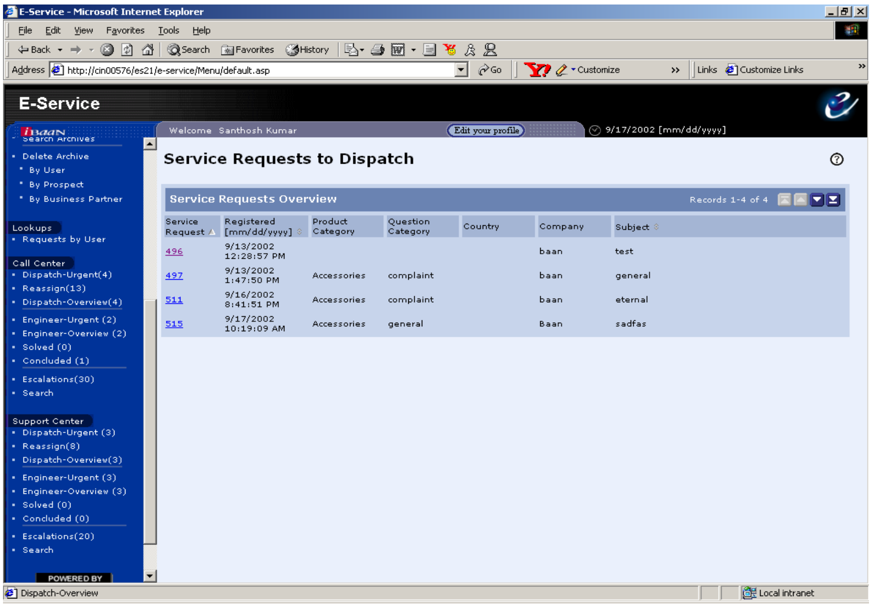

Figure 5-2 Service Requests to Dispatch overview page

The Service Request to Dispatch page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Subject	View the subject specified by the user to identify the service request.

Click on the hyperlink available for the service request number to perform the following actions on the service request:

- Assign service request
- Reassign service request
- Cancel service request

Assign service request

To assign a service request to a support center engineer, the dispatcher must click the hyperlink available on the Service Requests to Dispatch page:

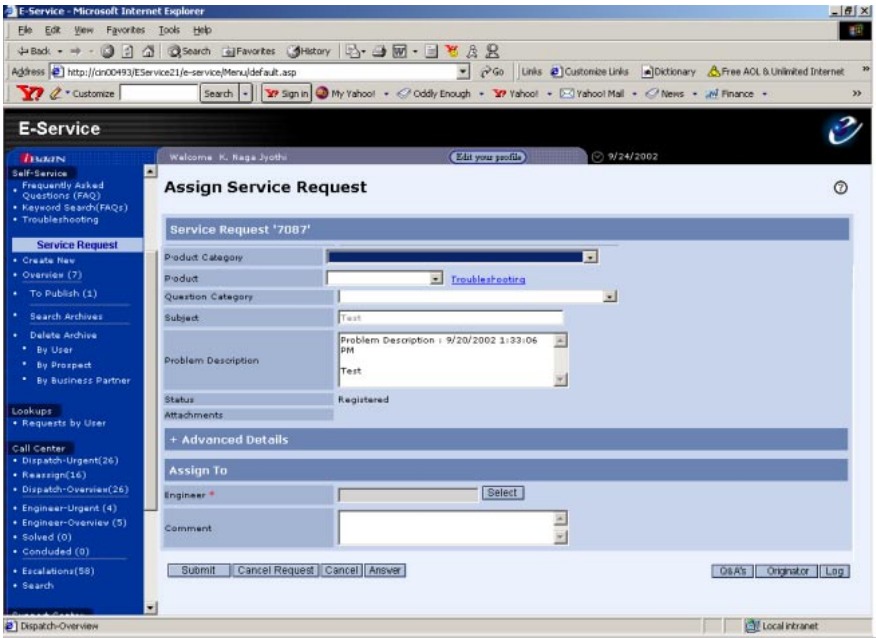

Figure 5-3 Assign Service Request page

The Assign Service Request page contains the following data fields:

Fields	Description
Product Category	View the category to which the product belongs. The product category specified by the user appears by default. The dispatcher can however modify the product category.
Product	View the name of the product.
Question category	View the category to which the question belongs. The question category specified by the user appears by default. The dispatcher can however modify the question category.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem.
Status	View the status of the service request.
Attachments	View the attachments linked to the service request.

View the following advanced details specified in the service request:

Fields	Description
Site	View the site.
Installation	View the installation code.
Installation Number	The installation number appears by default based on the installation code.
Serial Number	The serial number appears by default based on the installation code.
Problem Code	View the problem code.
Problem Priority	View the problem priority.
Reference	Enter the reference text.

Use the options available in the **Assign To** group box to do the following:

Fields	Description
Engineer	Select the support center engineer to whom you must attach the service request.
Comment	Enter comment to the service request.

- Click **Submit** to assign the service request to an engineer.
- Click **Cancel Request** to cancel the service request.

- Click **Cancel** to go to the Service Requests to Dispatch page.
- Click **Q&A** to view the details related to the problem and solution specified in the service request.
- Click **Originator** to view the details related to the user who created the service request.
- Click **Log** to view the transactions log, which gives the details of the various stages of the service request.

All the options available on this page are described in the following sections of this chapter.

Select an engineer

To assign a service request to the support center engineer, on the Assign Service Request page, the dispatcher must select the required support center engineer from the Support Center Engineers page:

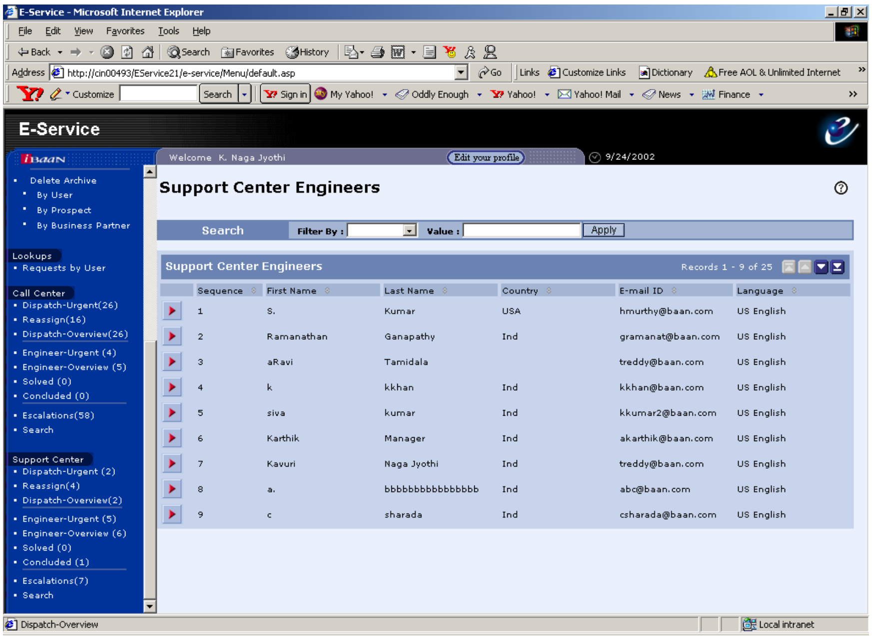

Figure 5-4 Support Center Engineers page

This page provides a list of all the support center engineers.

Based on the parameters defined by the administrator, if the application uses the dispatch rules to assign the service requests manually, the support center engineers appear in the order of the weightage assigned to them on this page.

If the application is not using the dispatch rules to manually assign the service request, the names of the support center engineers appear in alphabetical order.

View the following details related to a support center engineer on this page:

Fields	Description
Sequence number	View the sequence number.
First name	View the support center engineer's first name.
Last Name	View the support center engineer's last name.
Country	View the country to which the support center engineer belongs.
E-Mail address	View the support center engineer's e-mail address.
Language	View the language used by the support center engineer.

Use the icon corresponding to the sequence number to select the required engineer. The service request is assigned to the selected engineer on the Assign Service Request page.

Use the filters available on this page to search for the required support center engineer on the basis of the following:

- First name
- Last name
- Country
- E-mail
- Language

Reassign service requests

The dispatcher must re-assign a service request for various reasons, which can include the following:

- Service request is not in the preview of the engineer to whom the request was initially assigned.
- The support center engineer feels another person is more qualified to answer the query in the service request

- The engineer to whom the service request is initially assigned is busy and cannot provide a quick and efficient reply to the user who logged the service request.

The engineers use the **Reassign** option to send the service request to the dispatcher. The dispatcher must click the **Reassign** option on the E-Service menu to access the Service Requests to Dispatch page:

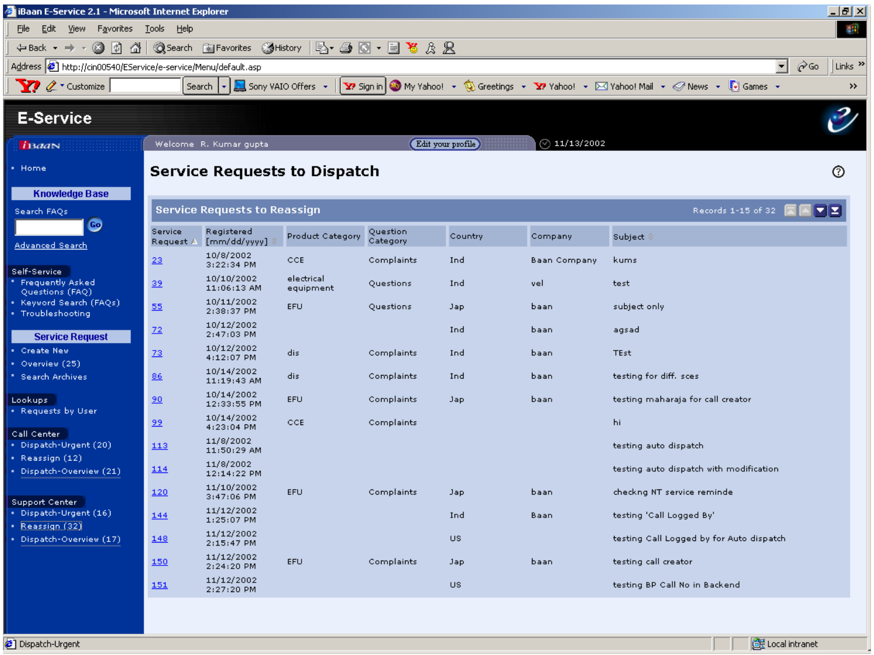

Figure 5-5 Service Requests to Dispatch page

The Service Request to Dispatch page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Subject	View the subject specified by the user to identify the service request.

Click on the hyperlink available for the service request number to perform the following actions on the service request:

- Reassign service request
- Cancel service request

Click the hyperlink to access the Assign Service Request page:

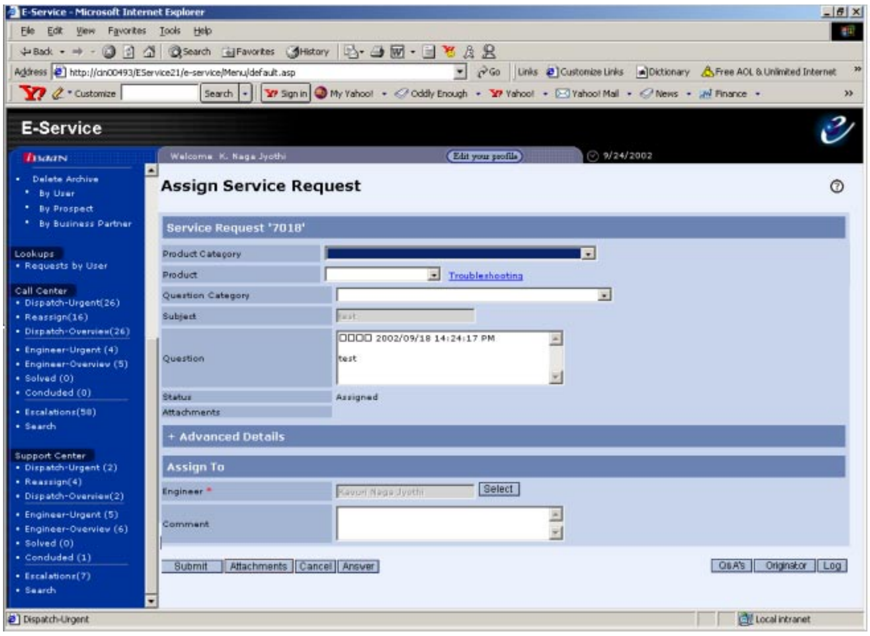

Figure 5-6 Assign Service Request page

The Assign Service Request page contains the following data fields:

Fields	Description
Product Category	View the category to which the product belongs. The product category specified by the user appears by default. The dispatcher, can however, modify the product category.
Product	View the name of the product. The product specified by the user appears by default. The dispatcher, can however, modify the product.
Question category	View the category to which the question belongs. The question category specified by the user appears by default. The dispatcher can however modify the question category.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem.
Status	View the status of the service request.
Attachments	View the attachments linked to the service request.

View the following advanced details specified in the service request:

Fields	Description
Site	View the site.
Installation	View the installation code.
Installation Number	The installation number appears by default based on the installation code.
Serial Number	The serial number appears by default based on the installation code.
Problem Code	View the problem code.
Problem Priority	View the problem priority.
Reference	Enter the reference text.

Use the options available in the **Assign To** group box to do the following:

Fields	Description
Engineer	Select the support center engineer to whom you must attach the service request. The name of the engineer to whom the service request was initially assigned appears by default. For more details about the procedure used to select an engineer to reassign the service request, refer to “Select an engineer,” in this chapter.
Comment	Enter a comment in the service request.

- Click **Submit** to assign the service request to an engineer.
- Click **Cancel Request** to cancel the service request. For more details about the procedure used to cancel the service request, refer to “Cancel service request,” in this chapter.
- Click **Cancel** to go to the Service Requests to Dispatch page.
- Click **Answer** to answer the service request. This option is available to the dispatcher on this page if the administrator has assigned the role of a support center engineer to the dispatcher. To view the procedure used by the engineers to provide a solution to the service request, refer to “Answer service request,” in this chapter.
- Click **Q&A** to view the details related to the problem and solution specified in the service request. For more information, refer to “View Q&A,” in this chapter.
- Click **Originator** to view the details related to the user who created the service request. For more information, refer to “View originator,” in this chapter.
- Click **Log** to view the transactions log that provides the details of the various stages of the service request. For more information, refer to “View log,” in this chapter.

View Q&As

The **Q&A** option enables you to access the Problems and Solutions page. Use this page to view the details related to the problem specified in the service request and the solution provided by the engineer:

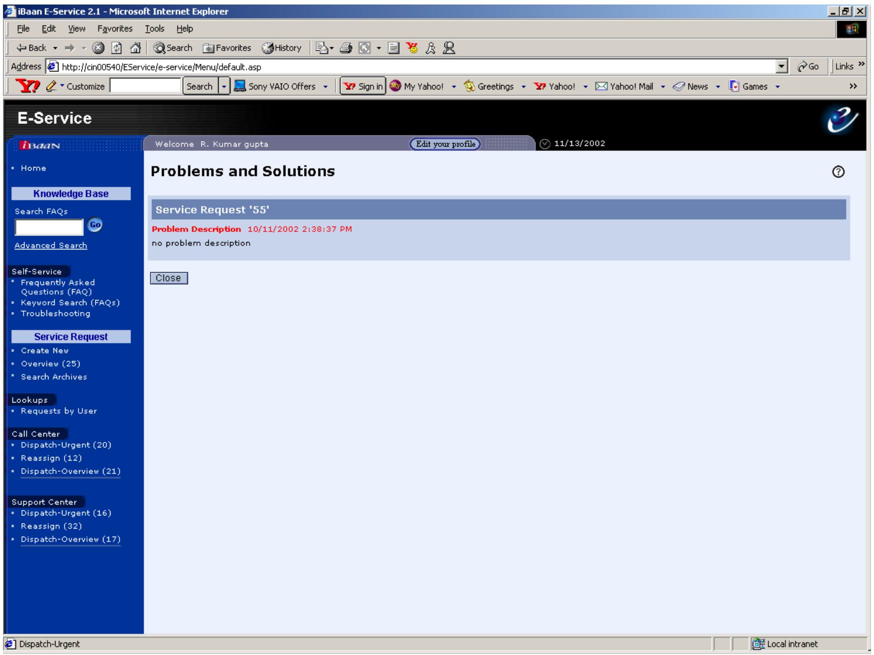

Figure 5-7 Problem and Solutions page

View the following details on this page:

- The service request number
- The date and time when the service request was sent to the service provider.
- The problem details.
- The date and the time when the support center engineer provided a solution.
- The solution details.
- Click **Close** to go to the page from which you accessed the **Q&A** option.

View originator

The **Originator** option enables you to access the User Details page, which provides the following details related to the user who created the service request:

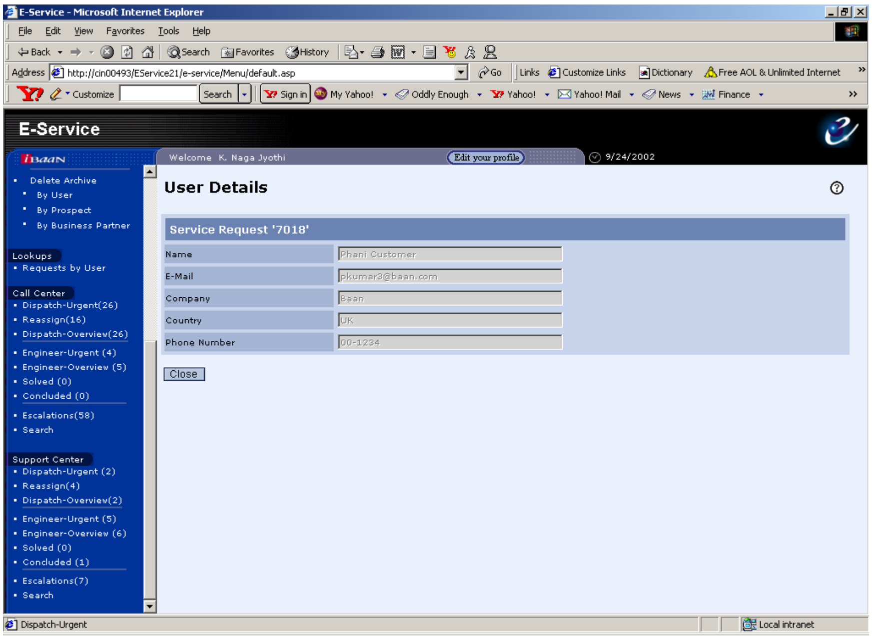

Figure 5-8 User Details page

The User Details page provides the following details about the user who created the service request:

Fields	Description
Name	View the name of the user who created the service request.
E-mail	View the user's e-mail address.
Company	View the name of the company to which the user belongs.
Business partner	View the business partner identification code to which the user belongs.
Country	View the country to which the user belongs.
Phone number	View the user's telephone number.

Click **Close** to go back to the page from which you have accessed the **Originator** option.

View log

The **Log** option enables you to access the Transactions page, which provides details of the various stages in the processing of the service request:

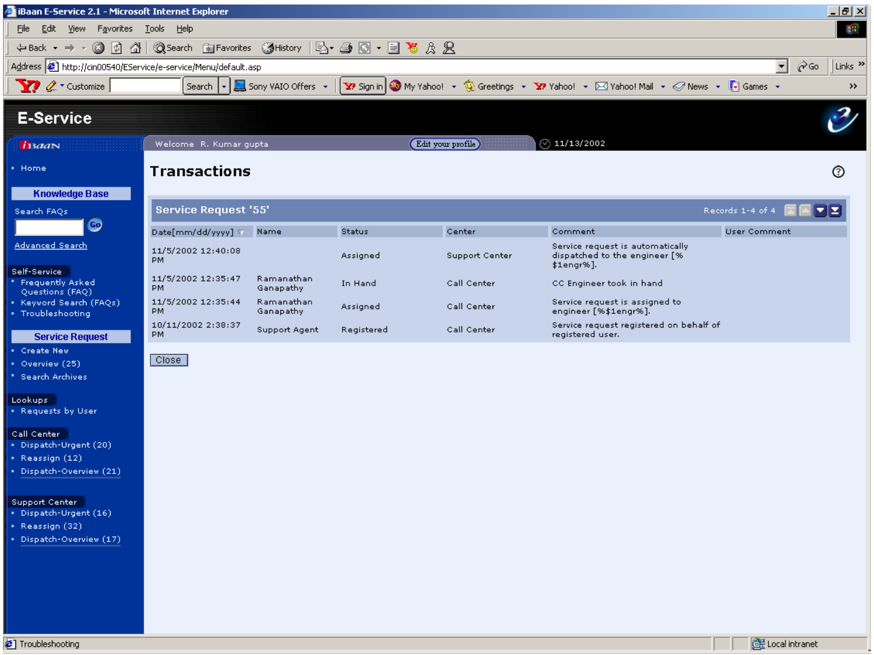

Figure 5-9 Transactions page

View the following details on the Transactions page:

Fields	Description
Date	View the date on which the service request was processed.
Name	View the name of the user who acted on the service request.
Status	View the status of the service request on the specified date.
Center	View the center that performed the action on the service request.
Comment	View the internal user’s comment attached to the service request.
User comment	View the user’s comments.

Click **Close** to go back to the page on which you selected the **Log** option.

Dispatch - Urgent

The dispatcher must use the **Dispatcher-Urgent** option available on the E-Service menu to view all the service requests that must be dispatched immediately to the support center engineers.

Based on the parameters defined by the administrator, all the service requests that users submit switch to Dispatch Urgent status after a specified period.

The service requests which the dispatcher can view by using the **Dispatcher - Urgent** option on the E-Service menu are also available by using the **Dispatcher - Overview** option.

The procedure used to assign the service requests in the Dispatcher-Urgent status is similar to the procedure used to dispatch a normal service request.

For more details of the procedure used to assign the service requests to the support center engineers, refer to “Dispatcher,” in this chapter.

Support center engineer

Based on the parameters defined by the administrator, an internal user of the application is categorized as a support center engineer. The engineer must answer the query specified in the service request.

A support center engineer can do the following:

- View all the assigned service requests.
- Solve the service requests
- Cancel the service requests
- Attach files or folders to the service request to provide a solution.
- View the concluded service requests.

The following sections describe in detail all the functions available to the support center engineer.

Engineer overview

The support center engineer must use the **Engineer-Overview** option on the E-Service menu to access the Service Requests page to view all the assigned service requests:

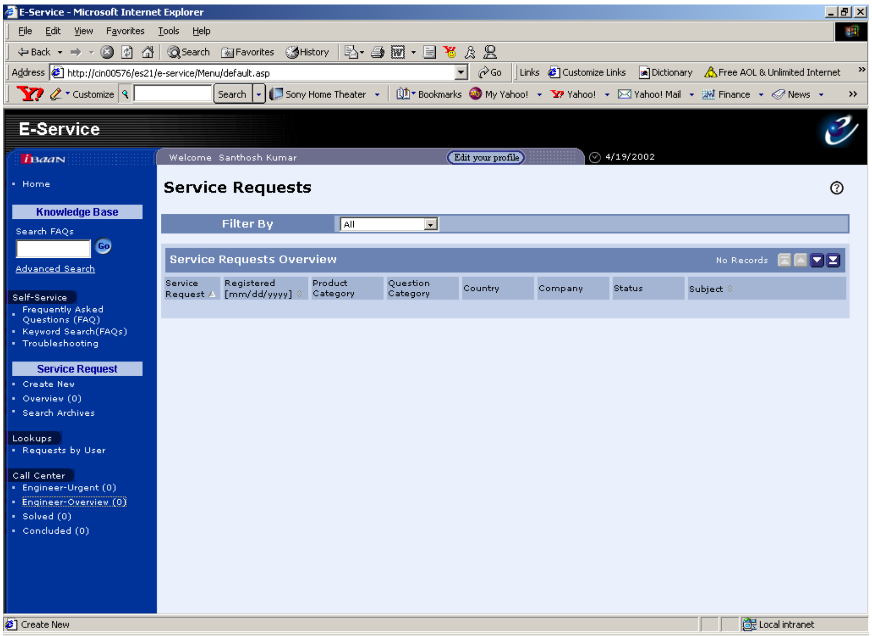

Figure 5-10 Service Requests page, engineer overview

The Service Request page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Status	View the service requests with the following status: ▪ Assigned ▪ In Hand ▪ Reopened ▪ Waiting (Internal Reasons) ▪ Waiting (External Reasons) ▪ Clarified
Subject	View the subject specified by the user to identify the service request.

Click on the hyperlink available for the service request number to perform the following actions on the service request:

- Take the service request In Hand.
- Cancel service request

Use the filters available on this page to sort the service requests on the basis of their status.

Select the status to view all the service requests:

- **Assigned:**
  View all the service requests with the status Assigned.
- **In hand:**
  View all the service requests with the status In hand.
- **Reopened:**
  View all the service requests with the status Reopened.

- **Waiting (Internal Reasons):**
  View all the service requests that are awaiting internal clarification.
- **Waiting (External Reasons):**
  View all the service requests that are awaiting external clarification.
- **Clarified:**
  View all the service requests with the status Clarified.

Service request details

The engineer must use the hyperlink provided for the service request number on the Service Requests page to view the service request details:

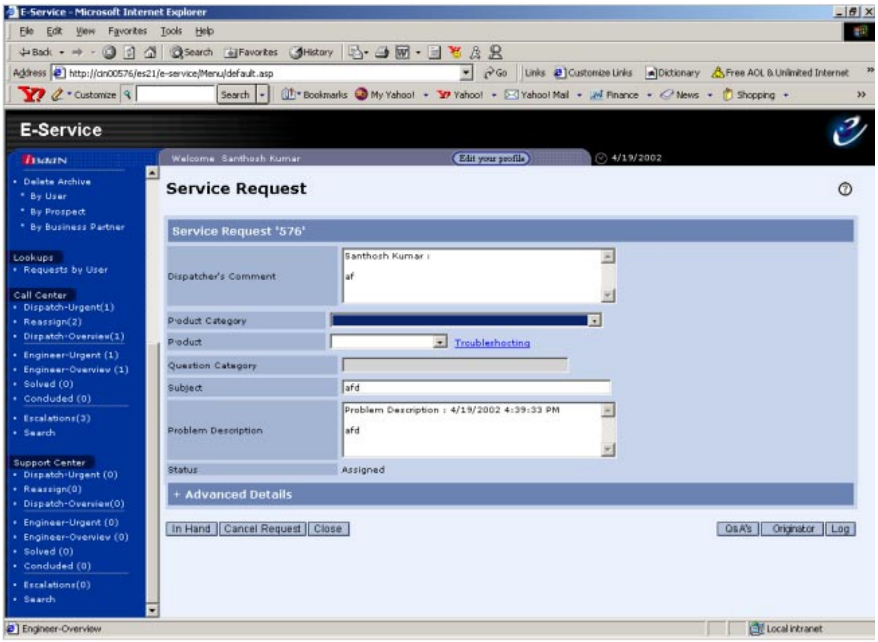

Figure 5-11 Service Request page

The Service Request page provides the following details related to a service request:

Fields	Description
Dispatcher's Comment	View the comment added by the dispatcher to the service request. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status Assigned.

View the following advanced details specified in the service request:

Fields	Description
Site	View the site.
Installation	View the installation code.
Installation Number	The installation number appears by default based on the installation code.
Serial Number	The serial number appears by default based on the installation code.
Problem Code	View the problem code.
Problem Priority	View the problem priority.
Reference	Enter the reference text.

The support center engineer can use the options available on this page to do the following:

- Click **In Hand** to answer the service request.
- Click **Cancel Request** to cancel the service request.

- Click **Close** to go to the Service Request Overview page.
- Click **Q&A** to view the details of the problem and solutions related to the service request.
- Click **Originator** to view the details related to the users who have created the service request.
- Click **Log** to view the transactions log related to the service request.

The following sections describe in detail the options available to the support center engineer.

Service request In Hand

The support center engineer must provide a solution to all the service requests that are In Hand.

Click the **In Hand** option on the Service Request details page to access the page, which shows the status of the service request as In Hand:

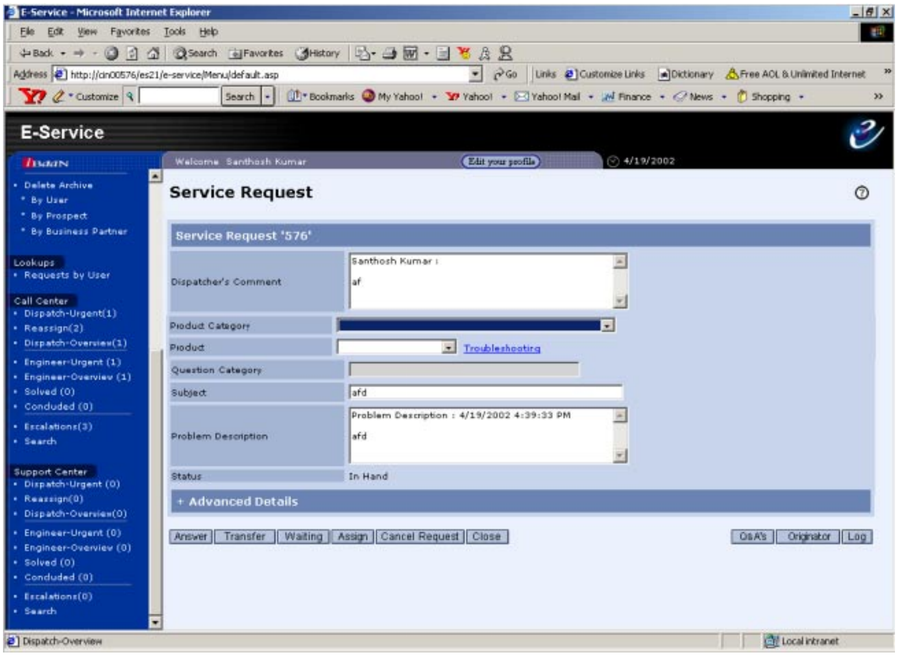

Figure 5-12 Service Request page, status In Hand

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

Fields	Description
Dispatcher's Comment	View the comment added by the dispatcher to the service request. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status In Hand

View the following advanced details specified in the service request:

Fields	Description
Site	View the site.
Installation	View the installation code.
Installation Number	The installation number appears by default based on the installation code.
Serial Number	The serial number appears by default based on the installation code.
Problem Code	View the problem code.
Problem Priority	View the problem priority.
Reference	Enter the reference text.

The support center engineer can use the options available on this page to do the following:

- Click **Answer** to provide a solution to the service request.
- Click **Waiting** to seek clarification either from the user who created the service request or from another internal source.

- Click **Assign** to assign the service request to another engineer.
- Click **Cancel Request** to cancel the service request.
- Click **Attachments** to add attachments to the service request.
- Click **Close** to go to the Service Request overview page.
- Click **Q&A** to view the problem and solutions detail related to the service request.
- Click **Originator** to view the details of the user who created the service request.
- Click **Log** to view the transactions log related to the service request.

To answer the service request

The support center engineer must provide a solution to the service request with the status In Hand. Use the **Answer** option available on the Service Request with the Status In Hand page to access the Solve Service Request page:

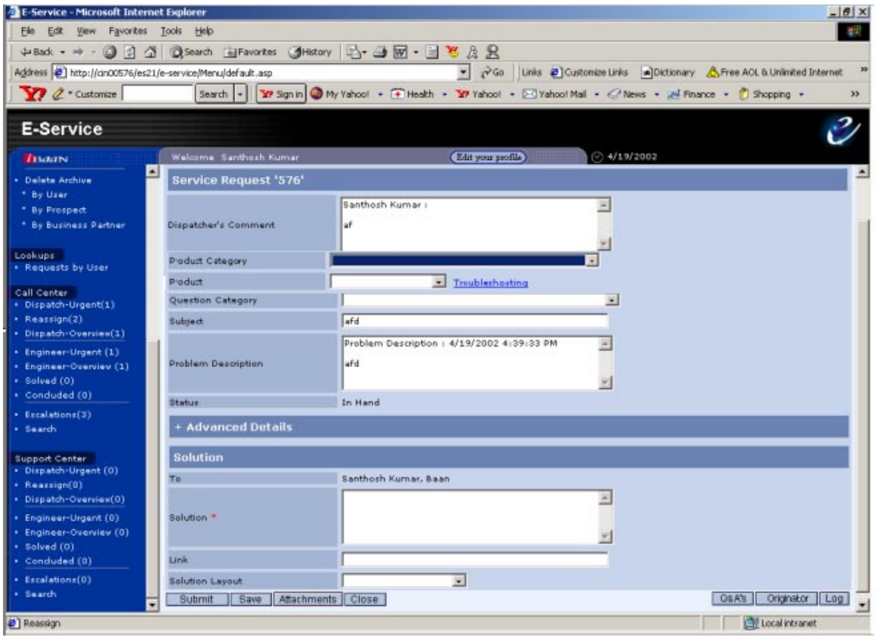

Figure 5-13 Solve Service Request page

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

Fields	Description
Dispatcher's Comment	View the comment added by the dispatcher to the service request. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status In Hand.

View the following advanced details specified in the service request:

Fields	Description
Site	View the site.
Installation	View the installation code.
Installation Number	The installation number appears by default based on the installation code.
Serial Number	The serial number appears by default based on the installation code.
Problem Code	View the problem code.
Problem Priority	View the problem priority.
Reference	Enter the reference text.

The support center engineer must provide the following details in the **Solution** group box:

Fields	Description
To	View the name of the user to whom the solution must be sent.
Solution	Enter the detailed solution.
Solution Layout	Select the mail format layout. A value in this field is mandatory to submit the solution.

The support center engineer can use the options available on this page to do the following:

- Click **Submit** to submit the solution.
- Click **Save** to save the solution.
- Click **Attachments** to add attachments to the service request.
- Click **Close** to go to the Service Request overview page.

Solution preview

The support center engineer can view the solution preview before the solution is actually sent to the user who created the service request.

To view the solution preview, the support center engineer must select the **Submit** option on the Solve Service Request page:

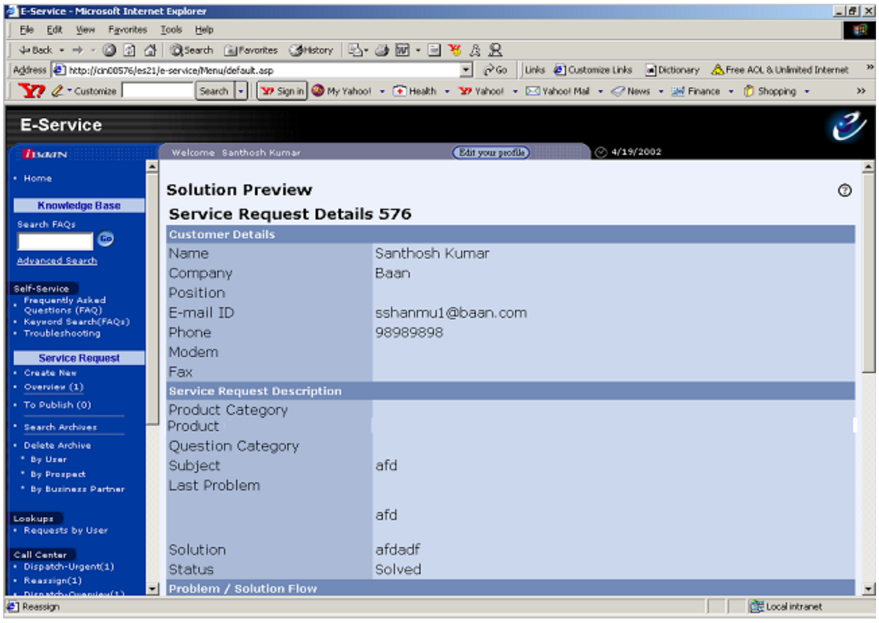

Figure 5-14 Solution Preview page

View the following details in the customer and the service request on this page:

The customer details include the following:

- Name
- Company
- Position
- E-mail address
- Phone
- Modem
- Fax

You can view the following service request details:

- Product category
- Product
- Question category
- Subject
- Last problem
- Solution
- Status

You can view the following problem/solution flow details:

- Complete flow
- Service request attachments
- Solution attachments
- Link

You can view the following installed base details:

- Site
- Installation
- Installation number
- Serial number
- Problem code
- Problem priority
- Reference

Click **Submit** to send the solution to the user who created the service request. The status of the service request changes to Solved.

To add attachments

This section describes the procedure used to add attachments to the service request. The support center engineer can add attachments to the service request to better describe the solution.

Click the **Attachments** option on the Solve Service Request page to add attachments to the service request. The attachments can be in any file format. On the Attachments page, you can attach any number of attachments to the service request:

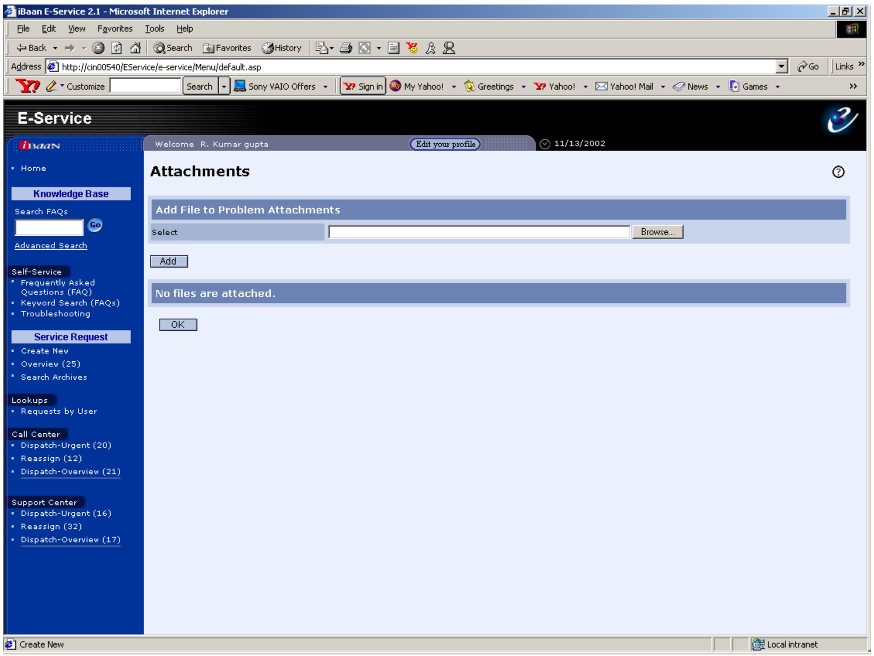

Figure 5-15 Attachments page

1 Click **Browse** to select the required file or folder, which 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 more attachments to the service request.

Select the check box that corresponds to the attachment and click **Remove** to remove the attachment from the service request. You must remove the service request only before you submit the request. After you submit the service request, you can no longer modify the existing attachments. However, you can add more attachments and then resend the service request.

Click **OK** on the Attachments page to go back to the Solve Service Request page.

Solved service request

The support center engineer must use the **Solved Service Request** option on the E-Service menu to view all the service requests with the status Solved:

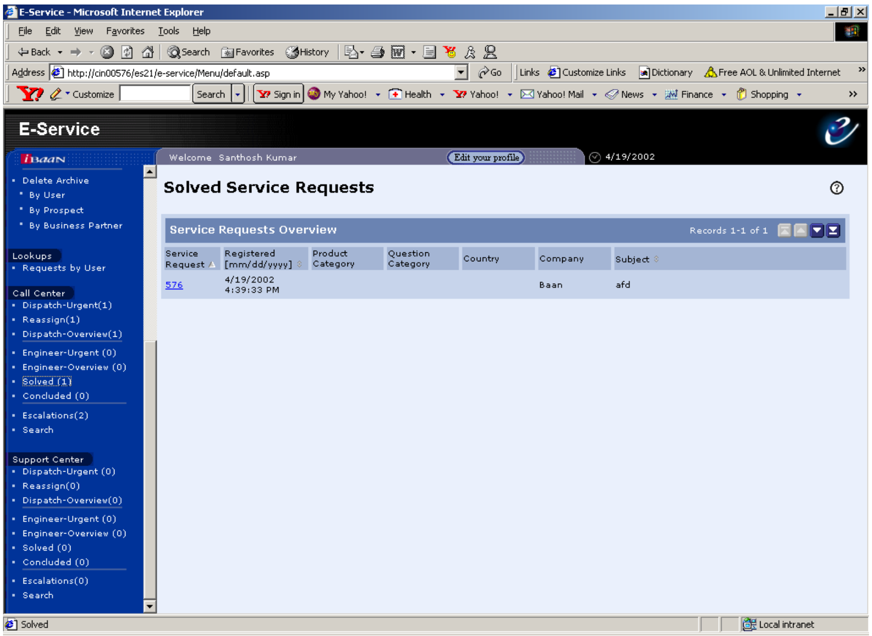

Figure 5-16 Solved Service Requests page

The Service Request page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Subject	View the subject specified by the user to identify the service request.

Click on the hyperlink available for the service request number to view not only the service request details, but also the solution details.

The support center engineer can use the options available on this page to provide additional solution to the service request:

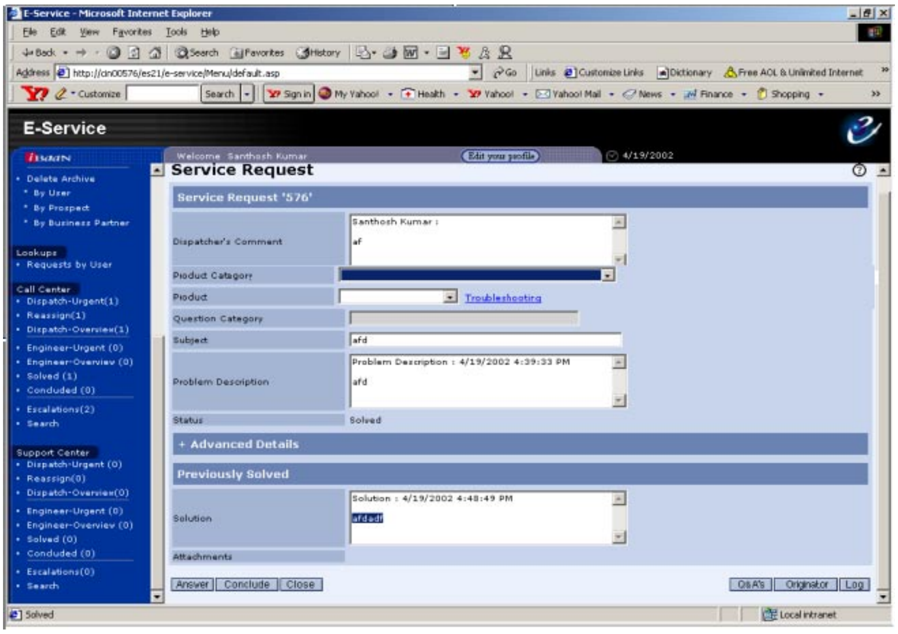

Figure 5-17 Service Request page

The Service Request page provides the following details related to a service request:

Fields	Description
Dispatcher's Comment	View the comment added by the dispatcher to the service request. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status Solved.

View the following advanced details specified in the service request:

Fields	Description
Site	View the site.
Installation	View the installation code.
Installation Number	The installation number appears by default based on the installation code.
Serial Number	The serial number appears by default based on the installation code.
Problem Code	View the problem code.
Problem Priority	View the problem priority.
Reference	Enter the reference text.

View the following details in the **Previous Solution** group box:

Fields	Description
Solution	View the solution details.
Attachments	View the attachments added by the support center engineer to provide a solution to the service request.

The options available on this page enable the support center engineer to do the following:

- Click **Answer** to provide an answer the service request once again.
- Click **Conclude** to conclude the service request. The status of the service request changes to Concluded.
- Click **Close** to go back to the Solved Service Request overview page.
- Click **Q&A** to view the problem and solutions detail related to the service request.
- Click **Originator** to view the details of the user who created the service request.
- Click **Log** to view the transactions log related to the service request.

Additional solution to service request

The support center engineer must use the **Answer** option on the Solved Service Request details page to provide additional solution to the service request:

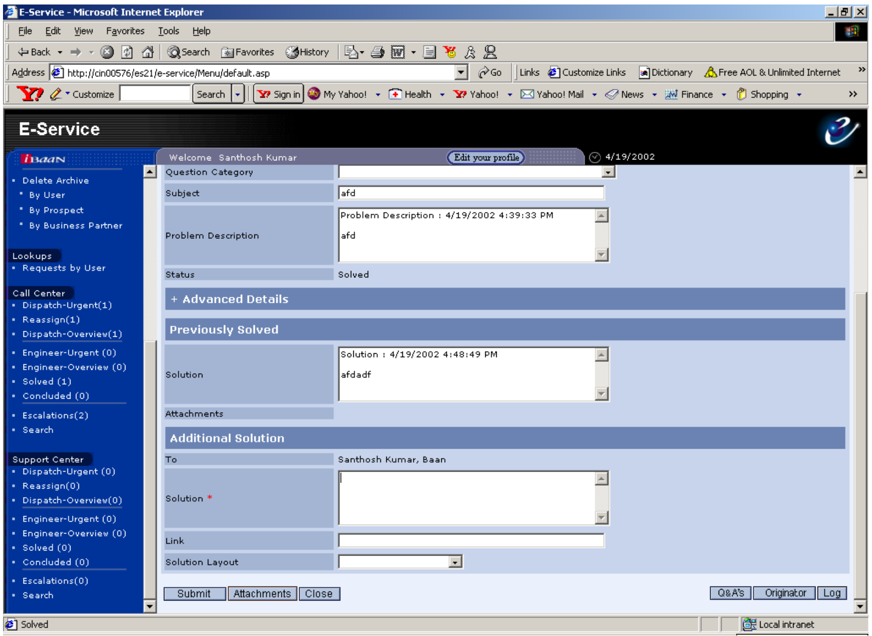

Figure 5-18 Solved Service Request page

The Solved Service Request page provides the following details related to a service request:

Fields	Description
Dispatcher's Comment	View the comment added by the dispatcher to the service request. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status Solved.

View the following advanced details specified in the service request:

Fields	Description
Site	View the site.
Installation	View the installation code.
Installation Number	The installation number appears by default based on the installation code.
Serial Number	The serial number appears by default based on the installation code.
Problem Code	View the problem code.
Problem Priority	View the problem priority.
Reference	Enter the reference text.

View the following details related to the previous solution:

Fields	Description
Solution	View the solution details.
Attachments	View the attachments added to the service request by the support center engineer.

The support center engineer must enter the following additional details to provide a solution to the service request:

Fields	Description
To	The name of the user who created the service request appears here.
Solution	Enter the solution details.
Solution Layout	Select the solution layout. A value in this field is mandatory.

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

- Click **Submit** to view the solution preview
- Click **Attachments** to add attachments to the service request.
- Click **Close** to go to the solved Service Request Overview page.
- Click **Conclude** to conclude the service request. The status of the service request changes to Concluded.

Engineer - Urgent

The support center must use the **Engineer - Urgent** option available on the E-Service menu to view all the service requests to which solution must be provided immediately.

Based on the parameters defined by the administrator, all the service requests to which the engineer must provide a solution move to the engineer Urgent status after a specified period.

The service requests which the engineer can view by using the **Engineer - Urgent** option on the E-Service menu are also available using the **Engineer - Overview** option.

The procedure used to provide a solution to the service requests in the Engineer - Urgent status is similar to the procedure used to provide a solution to a normal service request.

For more details of the procedure used to provide a solution to the service request, refer to "Engineer overview," Service request details," "Service request In Hand," "To answer the service request," and "Solution preview," in this chapter:

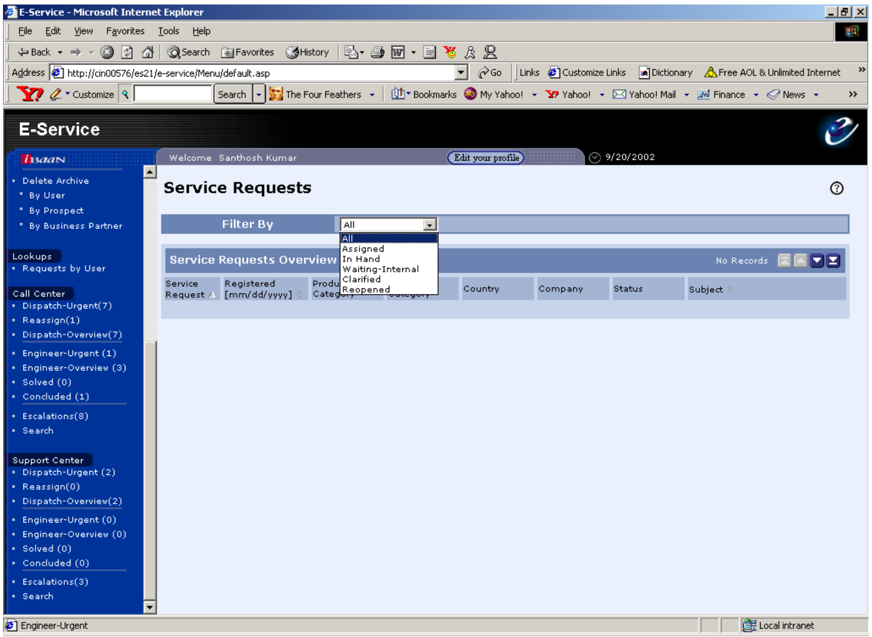

Figure 5-19 Service Requests, page, Engineer - Urgent

The Service Request page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Status	View the service requests with the following status: ▪ Assigned ▪ In Hand ▪ Reopened ▪ Waiting (Internal Reasons) ▪ Clarified
Subject	View the subject specified by the user to identify the service request.

Click on the hyperlink available for the service request number to perform the following actions on the service request:

- Take the service request 'In Hand'
- Cancel service request

Use the filters available on this page to sort the service requests on the basis of their status.

Select the status to view all the service requests:

- **Assigned**:
  View all the service requests with the status Assigned.
- **In hand**:
  View all the service requests with the status In hand.
- **Reopened**: View all the service requests with the status Reopened.
- **Waiting (Internal Reasons)**:
  View all the service requests which are waiting for internal clarification.

- **Clarified**:
  View all the service requests with the status Clarified.

Concluded service request

The support center engineer must use the **Concluded** option on the E-Service menu to view the service requests with the status Concluded:

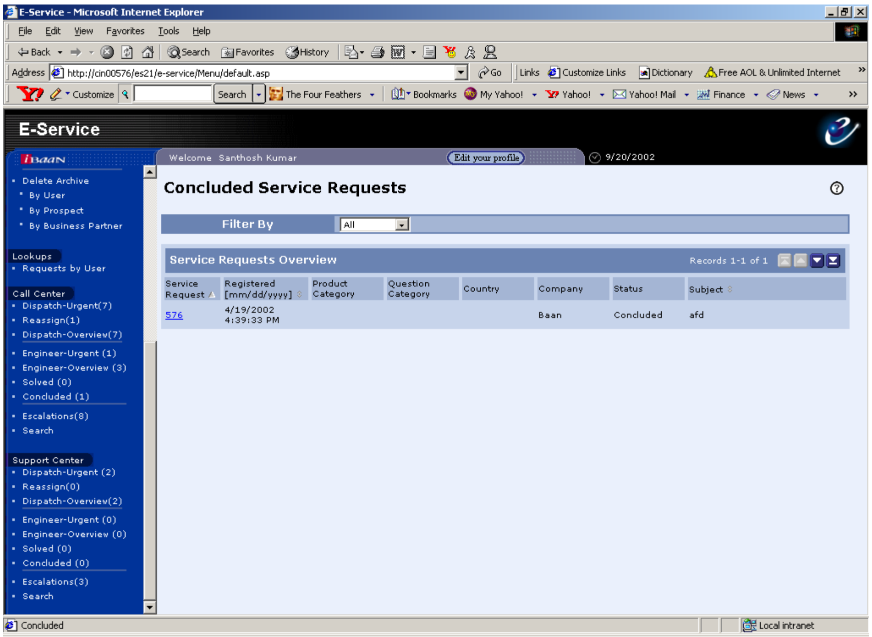

Figure 5-20 Concluded Service Requests page

The Service Request page provides the following details related to a service request:

Fields	**Description**
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Status	View the service requests with the following status: ▪ Concluded ▪ Accepted
Subject	View the subject specified by the user to identify the service request.

Use the filters available on this page to sort the service request on the basis of the following:

- **All:**
  Select this option to view all the service requests irrespective of their status.
- **Concluded**:
  Select this option to view all the service requests with the status Concluded**.**
- **Accepted**:
  Select this option to view all the service requests with the status Accepted.

Click on the hyperlink available for the service request number to access the Send to Publisher page. You can view the details of a service request that can be sent to the publisher:

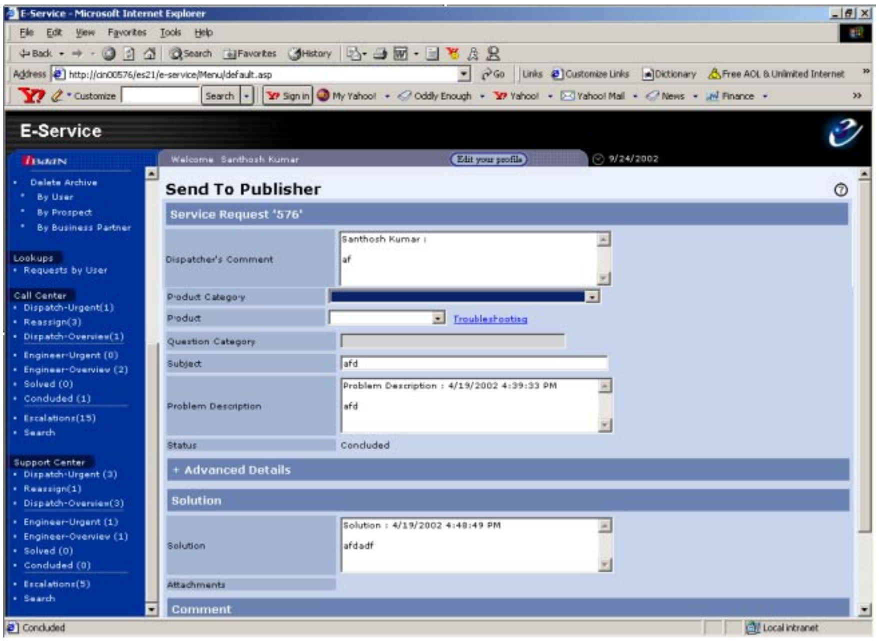

Figure 5-21 Send to Publisher page

The Send to Publisher page provides the following details related to a service request:

Fields	Description
Dispatcher's Comment	View the comment given by the dispatcher to the service request before transferring the request to the call center engineer. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user to create a service request.
Problem Description	View the detailed description of the problem.
Status	View the status of the service request. In this case, the status is Concluded.

View the following advanced details specified in the service request:

Fields	Description
Site	View the site.
Installation	View the installation code.
Installation Number	The installation number appears by default based on the installation code.
Serial Number	The serial number appears by default based on the installation code.
Problem Code	View the problem code.
Problem Priority	View the problem priority.
Reference	Enter the reference text.

View the following details related to the solution provided by the call center engineer on this page:

Fields	Description
Solution	View the solution details.
Attachments	View the attachments linked by the call center engineer to provide a solution to the service request.

View the following details related to the comment on this page:

Fields	Description
Transaction Log Comment	Enter a comment.

This page provides the following options:

- Click **Submit** to send the service request to the publisher.
- Click **Close** to go to the Concluded Service Requests Overview page.

Cancel Service Request

This section describes the procedure the support center engineer uses to cancel a service request.

Use the **Cancel Request** option on the Service Request Details page to cancel the service request:

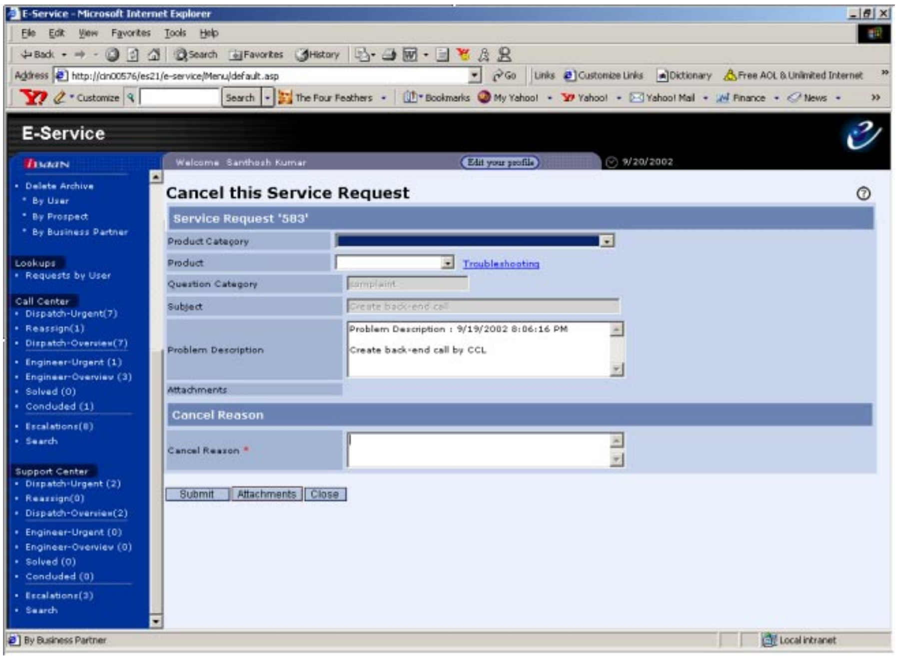

Figure 5-22 Cancel This Service Request page

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

Fields	Description
Dispatcher's Comment	View the comment added by the dispatcher to the service request. The **Dispatcher's Comment** field is not available on this page in the following situations: ▪ The service request is automatically assigned to the support center engineer. ▪ The support center dispatcher does not add a comment.
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status Assigned

View the following advanced details specified in the service request:

Fields	Description
Site	View the site.
Installation	View the installation code.
Installation Number	The installation number appears by default based on the installation code.
Serial Number	The serial number appears by default based on the installation code.
Problem Code	View the problem code.
Problem Priority	View the problem priority.
Reference	Enter the reference text.

Use the **Cancel Reason** field to enter a reason required to cancel the service request.

The support center engineer can use the options available on this page to do the following:

- Click **Submit** to cancel the service request. The status of the service request changes to Cancelled.
- Click **Attachments** to view the attachments.
- Click **Close** to go to the Service Request Overview page.

Requests by Engineer

This section describes the procedure used by the support center engineers to assign the service requests to self. The support center engineer must use the **Requests by Engineer** option to select a specific support center engineer and view all the service requests that are In Hand for the selected SCE.

Use the **Requests by Engineer** option to view the following page:

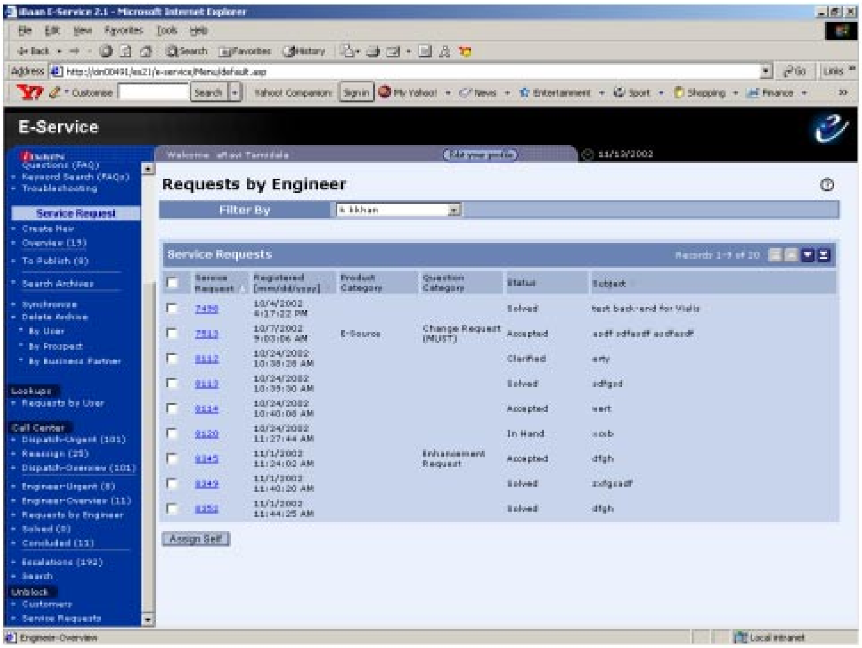

Figure 5-23 Requests by Engineer page

The Requests by Engineer page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Status	View the service requests with the following status: ▪ Assigned ▪ In hand ▪ Reopened ▪ Waiting (Internal Reasons) ▪ Waiting (External Reasons) ▪ Clarified
Subject	View the subject specified by the user to identify the service request.

Select the check box that corresponds to the service requests and click **Assign Self** to reassign the service request to yourself. The support center engineer can then take the required action related to the service request.

The support center engineer can also view the details of the service request that is already assigned to another support center engineer by using the hyperlink provided for the service request ID on the Service Request page:

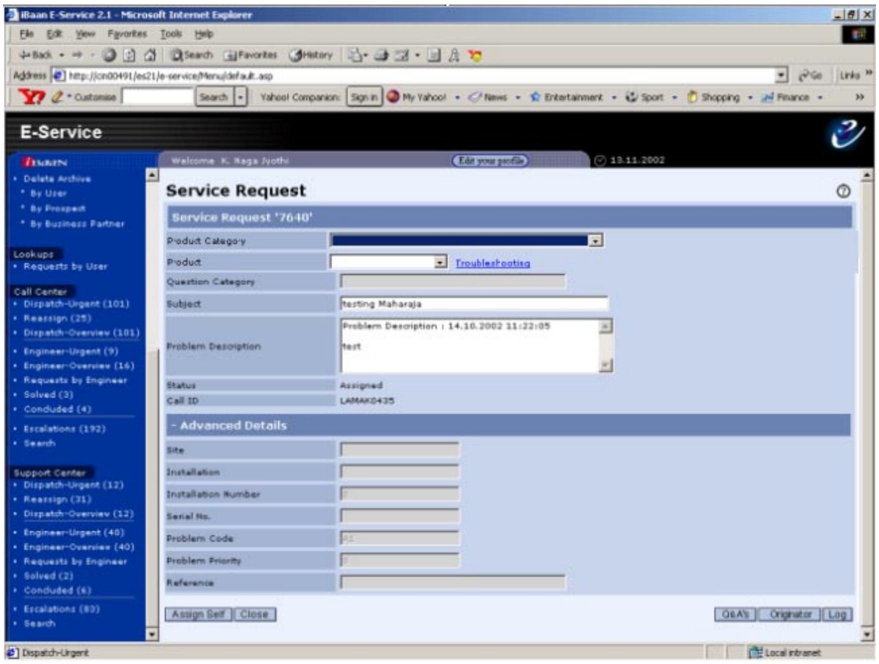

Figure 5-24 Service Request page

The Service Request page provides the following details related to a service request:

Fields	Description
Product category	View the category to which the product belongs.
Product	View the name of the product.
Question category	View the category to which the question belongs.
Subject	View the subject specified by the user who created the service request.
Problem Description	View the detailed description of the problem specified by the user who created the service request.
Status	View the service requests with the status Assigned.

If E-Service is integrated with iBaan ERP 5.0c in the back end, the engineer 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 have selected.
- **Serial Number:**
  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 that can be used to provide reference to the service provider.

This page provides the following options:

- Click **Assign Self** to reassign the service request that is already assigned to another call center engineer to you.
- Click **Close** to go to the Requests by Engineers page.

Support agent

Based on the user role assigned by the administrator, an internal user can be classified as a support agent.

The support agent can create a service request either on behalf of a registered user, guest user, privileged user, or themselves.

This section describes the procedure used to create a service request by the support agent:

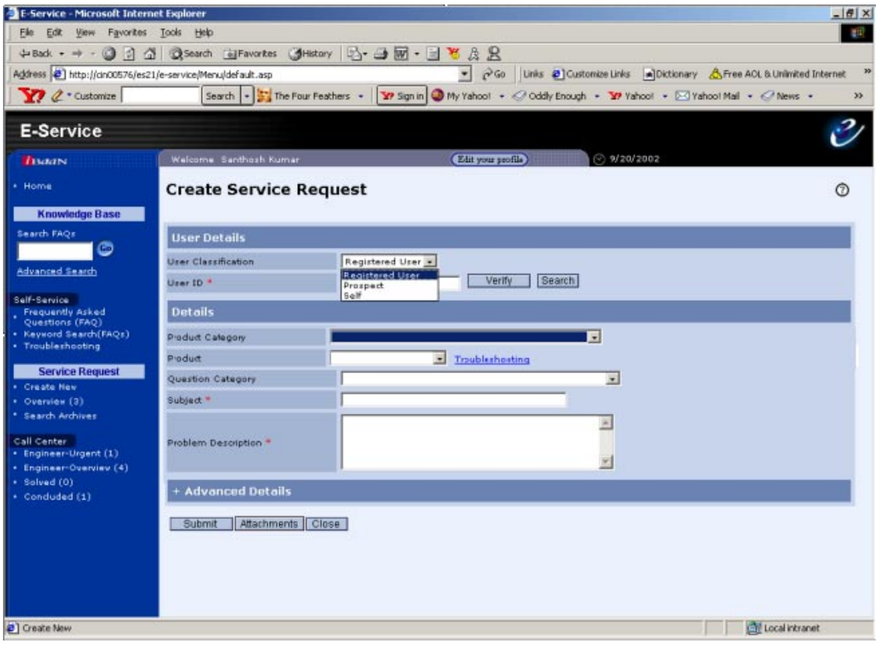

Figure 5-25 Create Service Request page, support agent creates service request

Registered user

To create a service request on behalf of a registered user, the support engineer must enter the following details on the Create Service Request page:

The Create Service Request page contains 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.
- **Product:**
  Select the product. You can view the list of products based on the visibility defined for you by the administrator.
- **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.

Enter the following additional details:

Fields	Description
Site	The site.
Installation	The installation code.
Installation Number	The installation number appears by default based on the installation code.
Serial Number	The serial number appears by default based on the installation code.
Problem Code	The problem code.
Problem Priority	The problem priority.
Reference	Enter the reference text.

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

Attachments:

The support agent 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. On the Attachments page, you can attach any number of attachments to the service request:

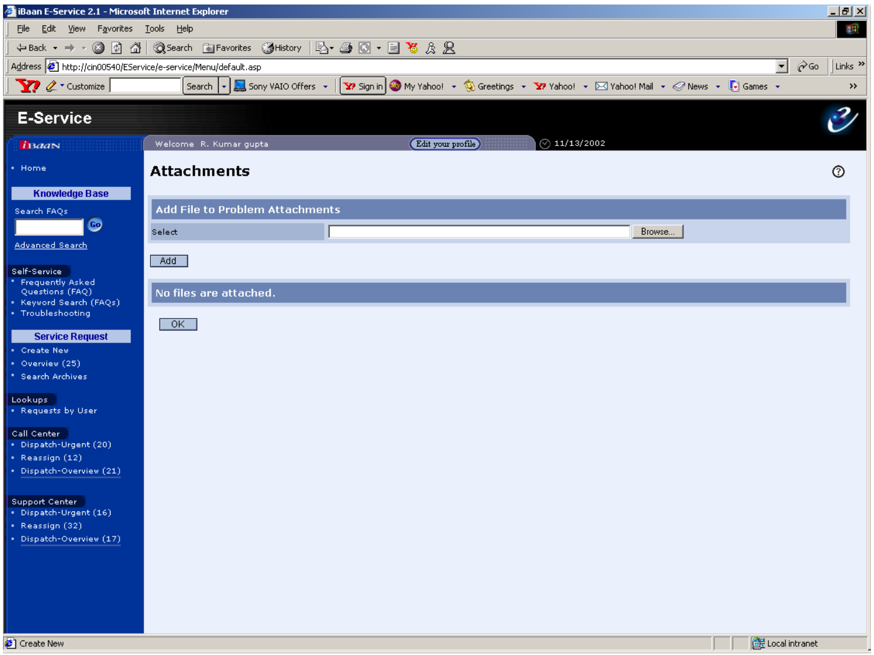

Figure 5-26 Attachments page

1 Click **Browse** to select the required file or folder, which 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 more attachments to the service request.

Select the check box that corresponds to the attachment and click **Remove** to remove the attachment from the service request. You must remove the service request only before you submit the request. After you submit the service request, you can no longer modify the existing attachments. However, you can add more attachments and then resend the service request.

- Click **Close** on the Attachments page to go back to the Create Service Request page.

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

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

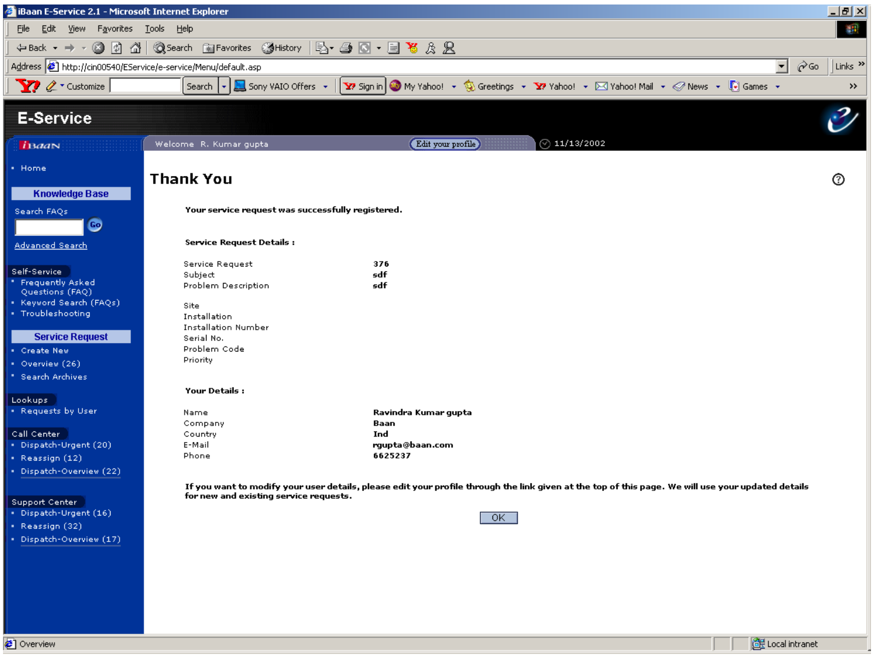

Figure 5-27 Thank You page

This page provides the following details:

Service Request Details:

- Service Request: The service request identification code.
- Product Category: The category to which the product belongs.
- Product: The name of the product.
- 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 to report the receipt of the service request.

On the Thank You page, the **Edit your Profile** option is available, which you can use to access the Change Your Registration page and modify the existing details in your profile:

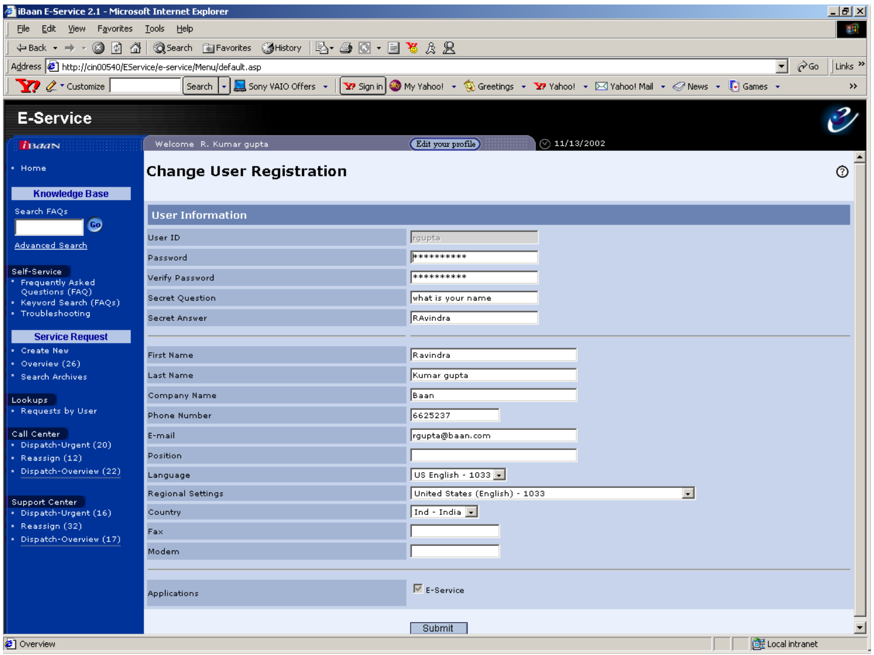

Figure 5-28 Change User Registration page

Make the required modifications on this page and click **Submit** to go back to the home page.

Verify user details

The support agent must use the **Verify** option on the Create Service Request page. Enter a user ID and click **Verify** to authenticate the user:

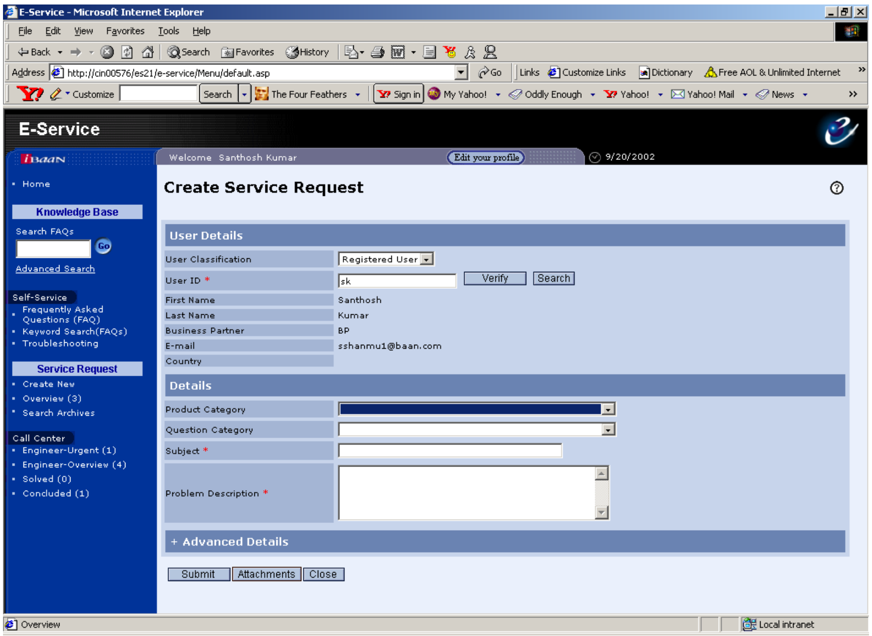

Figure 5-29 Create Service Request page, verify user details

The following user details appear on this page:

- **First Name**:
  View the user's first name.
- **Last Name**:
  View the user's last name.
- **Business Partner**:
  View the business partner to which the user belongs.
- **E-mail**:
  View the user's e-mail address.
- **Country**:
  View the country to which the user belongs.

When the support agent verifies the user details and if the user is a privileged user, the support agent can enter the details required to create a service request for a privileged user, based on the parameters defined by the administrator.

If the support agent does not verify the user's user details, the procedure used to create a service request is similar to that of a normal registered user or guest user.

A user becomes a privileged user based on the parameters defined by the administrator, which you can set at company level or at user level. The administrator can define various parameters for registered users and guest users.

If the parameters are set at company level, all the registered users or guest users are classified as privileged user.

If the parameters are set at user's level, only specific registered users or guest users are classified as privileged users.

The administrator defines the routing options for the privileged users in the following manner.

- **Routing** option is set to **Call Center**, all the service requests that are created on behalf of the privileged users are routed to the call center.
- **Routing** option is set to **Support Center**, all the service requests that are created on behalf of the privileged users are routed to the support center.

- If the **Routing** option is set to **User Choice**, the support agent can use the options available in the **Register In** field, as shown in the following figure, to specify, on behalf of the user, whether the service requests must be routed to either the call center or the support center:

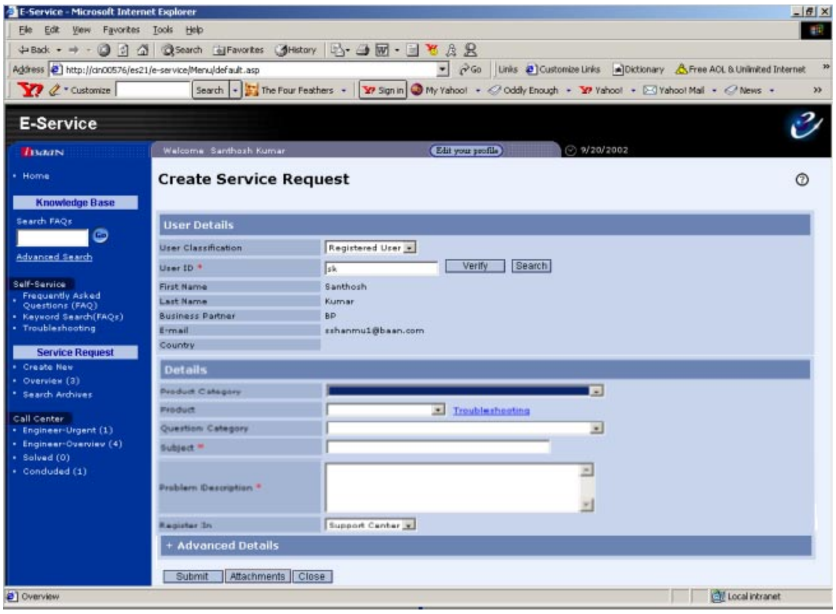

Figure 5-30 Create Service Request page

Based on the option specified on this page, the service request is routed to the support center.

Caller's information

The support agent can use the **Search** option on the Create Service Request page to search for user details.

Click **Search** to access the Caller's Information page:

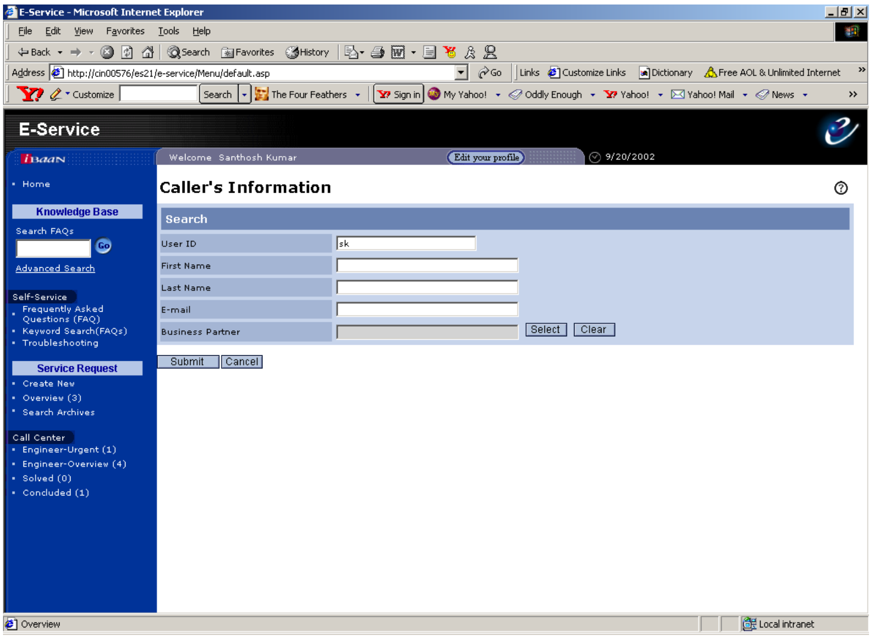

Figure 5-31 Caller's Information page

Enter a value in either one or more fields to search for the required user.

Fields	Description
User ID	Enter the unique identification code assigned to the user to access the application.
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
E-mail	Enter the user's e-mail address.
Business Partner	Select the business partner to which the user belongs.

- Click **Submit** to search for the user ID on the basis of one or more search criteria.

- Click **Cancel** to go to the Create Service Request page:

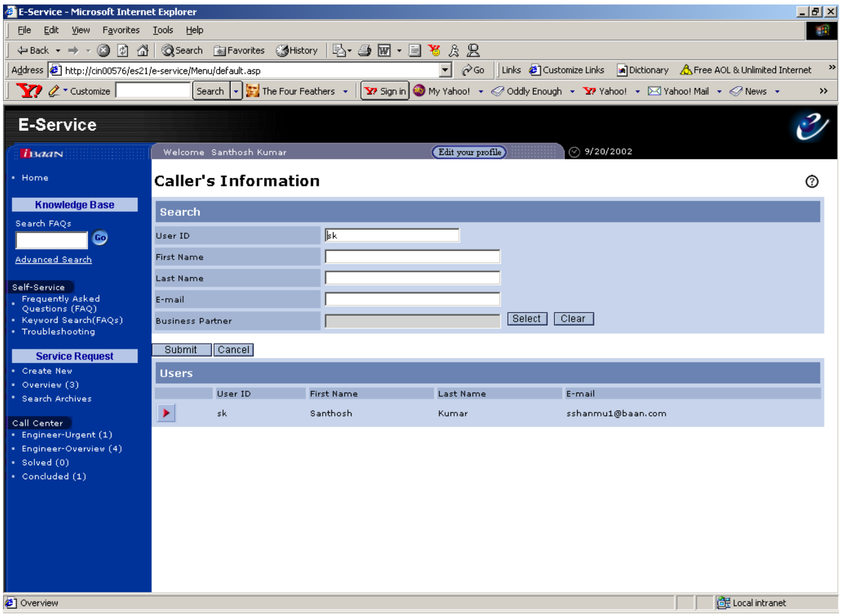

Figure 5-32 Caller's Information results page

- Click **Submit** to view the search results.

View the following details related to a user on this page:

- **User ID**:
  View the user ID assigned to the user.
- **First Name**:
  View the user's first name.
- **Last Name**:
  View the user's last name.
- **E-mail**:
  View the user's e-mail address.

Click the icon that corresponds to the user ID to add the user to the Create Service Request page.

Select business partner

The support agent must use the **Select Business Partner** option on the Callers Information page to view a list of all the business partners:

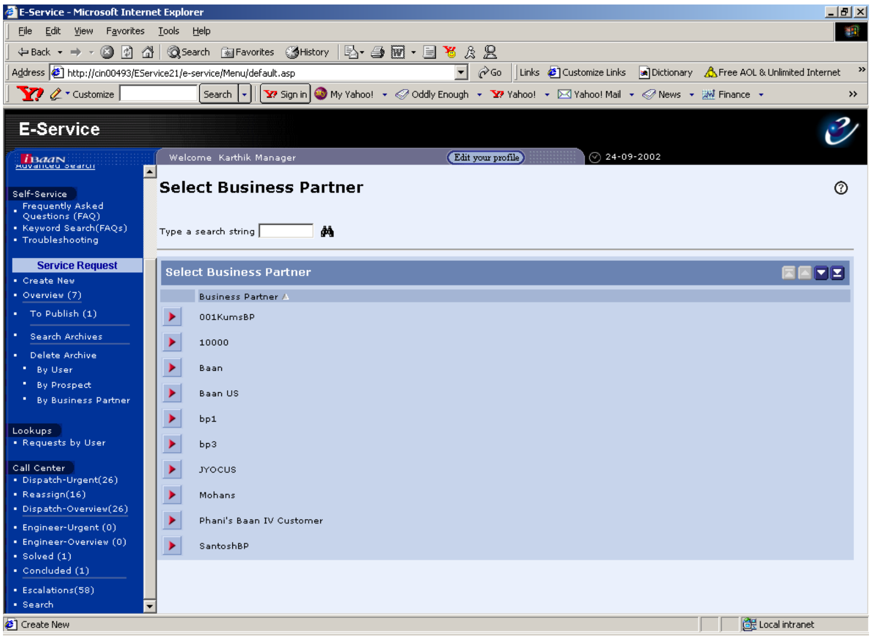

Figure 5-33 Select Business Partner page

The Select Business Partners page provides the following details:

- **Business Partner**:
  The business partner identification code appears in this field.

Select the icon that corresponds to the business partner code to select the business partner on the basis of which you can search for the required user on the Caller's Information page.

Supervisor

Based on the user role assigned by the administrator, an internal user of the application can be classified as the supervisor.

The supervisor can do the following:

- View the support center escalations
- Search for all the service requests
- Maintain the service request archives

The following sections describe the functions of the supervisor in detail.

Support center escalations

The supervisor can use the **Escalations** option on the E-Service menu to view a list of all the service requests that must be immediately assigned to the support center engineer. Based on the parameters defined by the administrator, the service requests automatically reach the escalations status, after a specific duration.

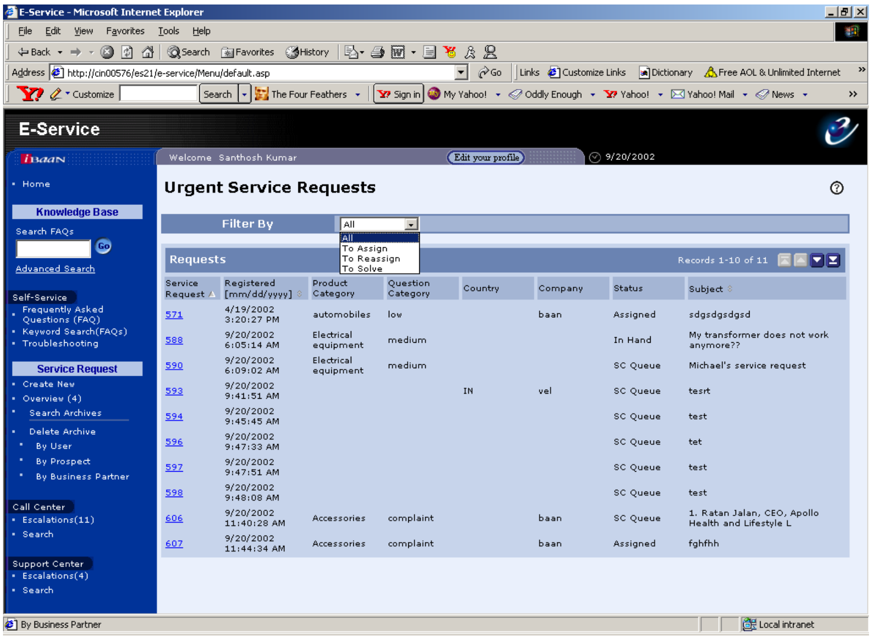

Figure 5-34 Urgent Service Requests page

The Urgent Service Request page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Status	View the service requests with the following status: ▪ Assigned ▪ In Hand ▪ Reopened ▪ Waiting (Internal Reasons) ▪ Waiting (External Reasons) ▪ Clarified
Subject	View the subject specified by the user to identify the service request.

Click on the hyperlink available for the service request number to view the service request details.

Service request search

The administrator must use the **Service Request Search** option to locate a service request based on either one or more criteria specified on the Service Request Search page:

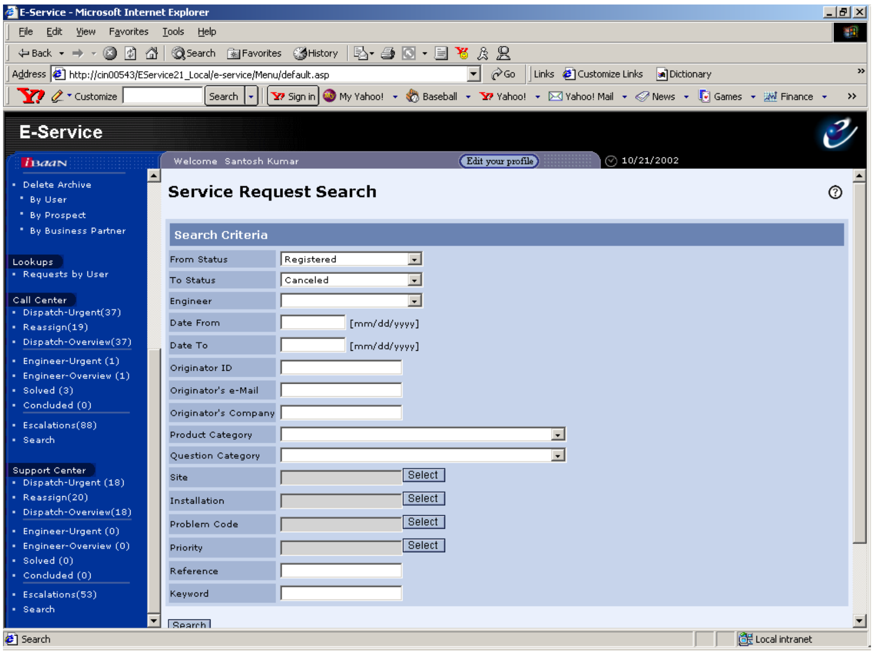

Figure 5-35 Service Request Search page

Specify either one or more options required to search for the service request.

Fields	Description
From status	Select one of the following status of the service request: ▪ Assigned ▪ In Hand ▪ Waiting Internal ▪ Waiting External ▪ Clarified ▪ Solved ▪ Reopened ▪ Concluded ▪ Accepted ▪ To Publish ▪ Support Center Queue ▪ Closed ▪ Cancelled
To Status	Options in this field are similar to that of the statuses available in the **From Status** field.
Engineer	Enter the engineer details.
Date from	Select the date from which you must start the search.
Date to	Select the date up to which you must search.
Originator ID	Enter the identification code assigned to the user.
Originator’s E-mail	Enter the user’s e-mail address.
Originator’s company	Enter the company to which the user belongs.
Product category	Select the category to which the product belongs.
Question Category	Select the category to which the question belongs.
Site	Select the site code.
Installation	Select the installation code.
Problem Code	Select the problem code
Priority	Select the priority.
Reference	Enter the reference text used to search for the service request.
Keyword	Enter the keyword used to search for the service request.

- Click **Search** to view the service request search results.

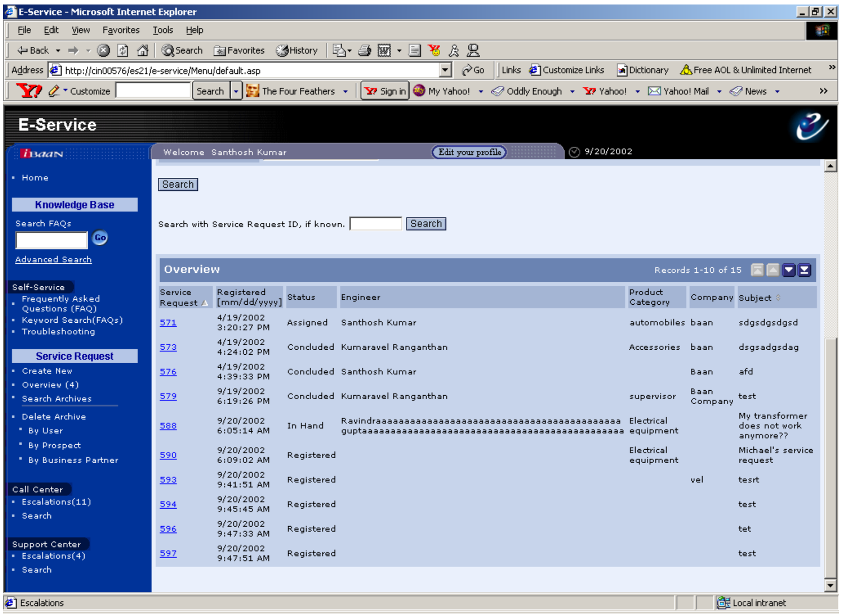

Figure 5-36 Search results

View the following details related to the service request on this page:

The Service Request page provides the following details related to a service request:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Status	View the service request's status.
Engineer	The name of the engineer who solved or closed the service request.
Product category	View the category to which the product belongs.
Company	View the company to which the user who created the service request belongs.
Subject	View the subject specified by the user to identify the service request.

Click the hyperlink available for the service request number to view the service request details.

Delete archives

The supervisor can delete the archives on the basis of the user, guest user, or business partner

Archives can be deleted automatically or manually. The administrator must define the parameters to automatically delete the service requests after a specific duration as archives.

The supervisor can manually delete the archives based on the procedures described in the following sections of this chapter.

Use the Delete Archive of User page to delete the archives that belong to a specific user:

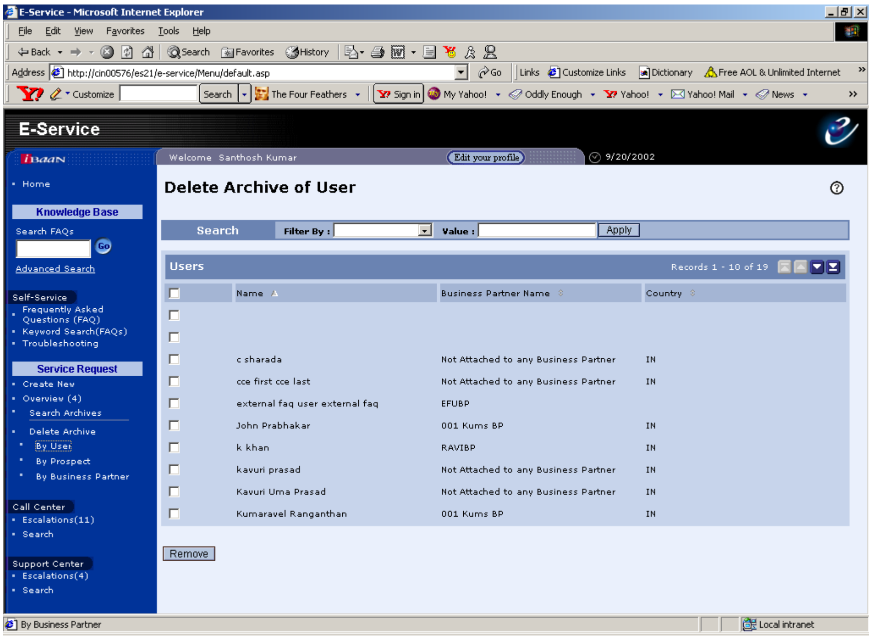

Figure 5-37 Delete Archive of User page

The Delete Archive of User page provides the following details related to a user.

- **Name**:
  View the user's name.

- **Business Partners Name**:
  View the business partner's name.
- **Country**:
  View the country to which the user belongs.

Select the check box to delete the service requests that belong to a specific user.

The supervisors must use the Delete Archive of Prospect page to delete the archived service requests of the prospects:

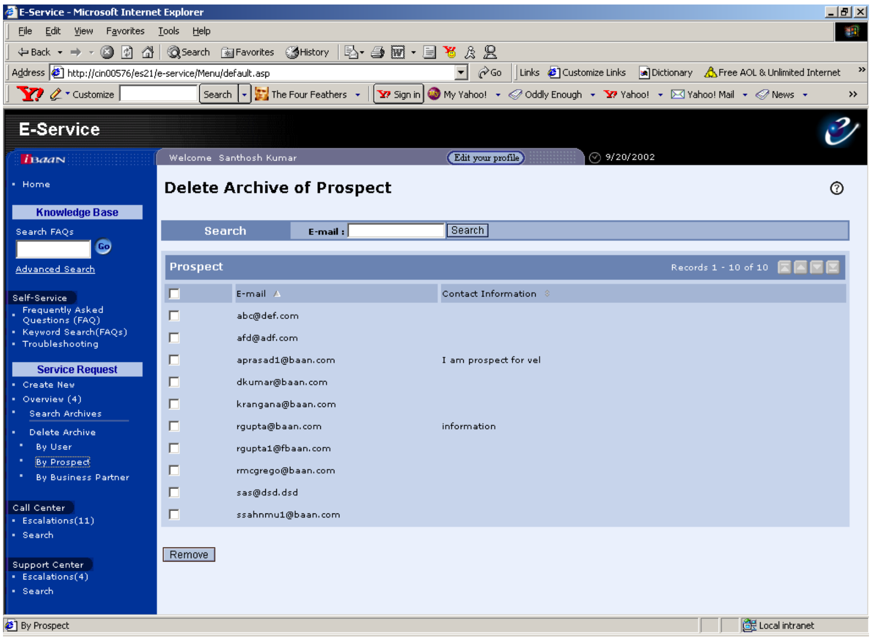

Figure 5-38 Delete Archive of Prospect page

View the following details on the Delete Archive of Prospect page:

- **E-mail**:
  View the guest user's e-mail address.
- **Contact Information**:
  View the guest user's contact information.

Select the check box that corresponds to the e-mail and click **Remove** to delete all the archived service requests created by the guest users.

To delete the archived service requests on the basis of the business partner, the supervisor must access the Delete Archive of Business Partner page:

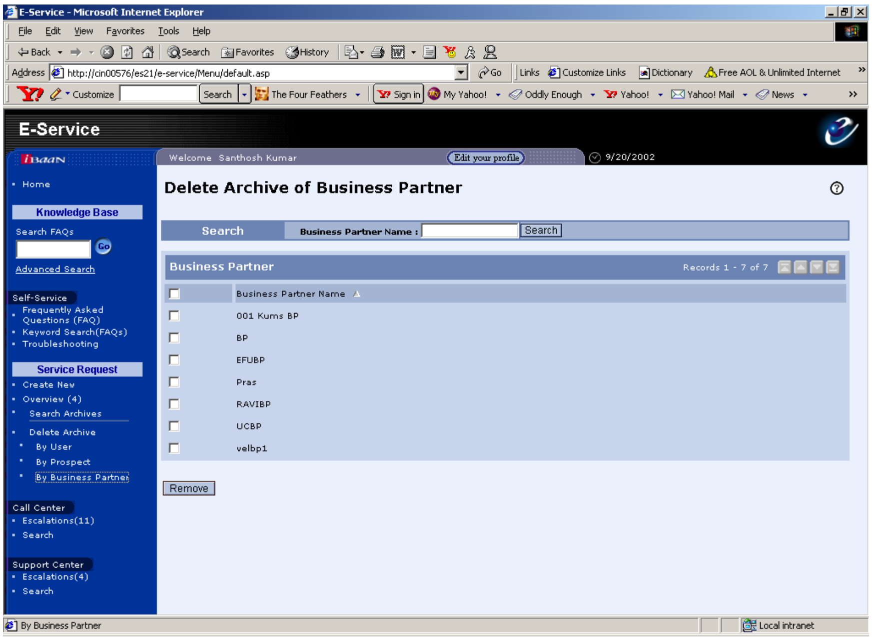

Figure 5-39 Delete Archive of Business Partner page

Select the check box that corresponds to the business partner name and click **Remove** to delete all the archived service requests related to a business partner. Archived service requests created by the users linked to the business partners are also deleted.

Publisher

Based on the parameters the administrator defines, an internal user of the application is categorized as a publisher. The publisher edits and publishes the service requests as FAQs in the FAQs database.

A publisher can do the following:

- View all the service requests that can be published as FAQs.
- Publish the service requests.
- Publish the troubleshooting tree.
- Publish the troubleshooting template.

Service requests to publish

The publisher must use the **To Publish** option on the E-Service menu to access the Service Requests to Publish page. This page displays a list of all the service requests that can be published as FAQs:

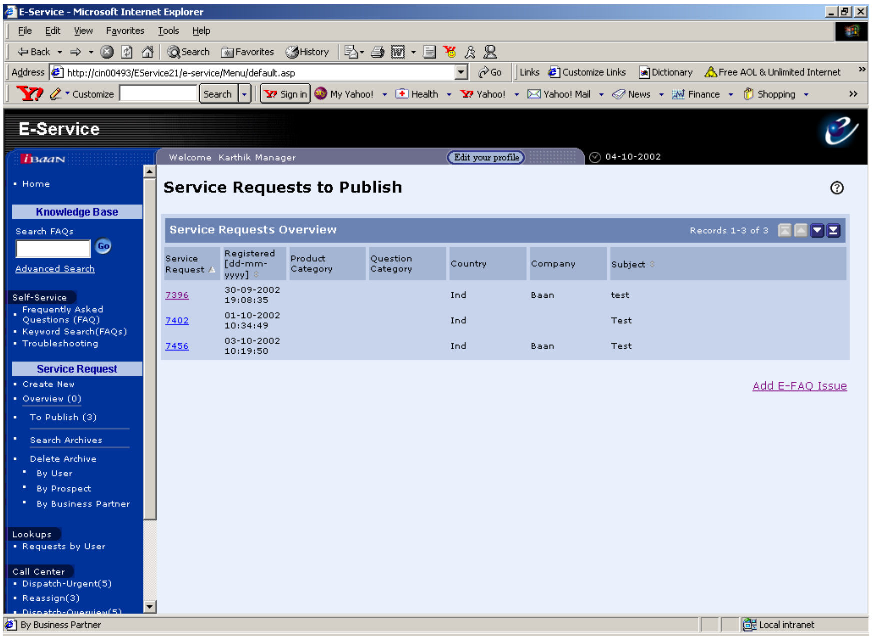

Figure 5-40 Service Requests to Publish page

The publisher can view the following details related to a service request on this page:

Fields	Description
Service Request	View the unique identification code assigned to the service request. Click the hyperlink available in this field to view the service request details.
Registered	View the date and the time when the service request was registered.
Product category	View the category to which the product belongs.
Question category	View the category to which the question belongs.
Country	View the country to which the user who created the service request belongs.
Company	View the company to which the user who created the service request belongs.
Subject	View the subject specified by the user to identify the service request.

Click on the service request ID to access the Publish to FAQs page.

Publish to FAQ - details

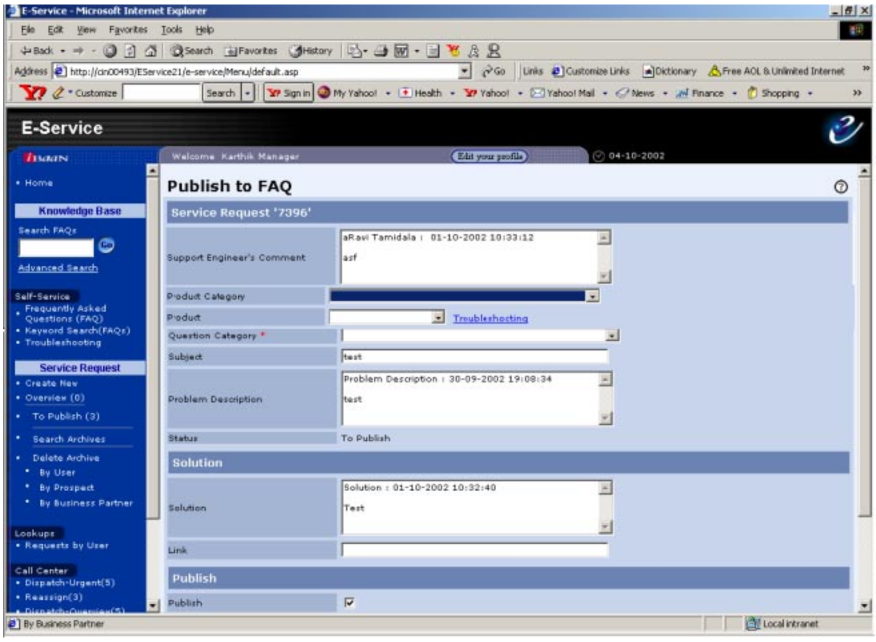

Figure 5-41 Publish to FAQ page

The Publish to FAQ page displays the following details related to a service request:

Fields	Description
Engineer's Comment	View the comment added by the engineer to the service request.
Product category	View or enter the category to which the product belongs.
Product	View or select the product.
Question category	View or enter the category to which the question belongs.
Subject	View or enter the subject.
Problem Description	View or enter the detailed description of the problem.
Status	View the service request status.

The publisher can view the following details related to the solution provided to the service request:

Fields	Description
Solution	View or enter the solution details.
Link	View or enter the link to a Web site to provide more details related to the solution.

The publisher can add the following details to the service request.

Fields	Description
Publish	Select the check box to publish the service request as an FAQ.
Available To	Specify the visibilities in which the service request must be available as FAQ.
Comment	Add a comment to the service request.

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

- Click **Submit** to publish the service request.
- Click **Attachments** to add attachments to the service request.
- Click **Cancel** to go back to the Service Request to Publish page.
- Click **Q&A** to view the problem and solutions detail related to the service request.
- Click **Originator** to view the details of the user who created the service request.
- Click **Log** to view the transactions log related to the service request.

Troubleshooting tree

If the publisher role is assigned to a user, the user can access the application as a publisher and use the options available on the E-Service menu to create and publish troubleshooting trees.

A troubleshooting tree contains various nodes, which can be classified as Troubleshooting Categories, Questions, Answers, and Actions.

The following sections in this chapter describe the following:

- The procedure in which the publisher can enter and maintain the data related to the various nodes, which include the troubleshooting categories, questions, answers, and actions
- The procedure used to create and maintain the troubleshooting tree and template.

Categories

The publisher can use the **Categories** option on the E-Service menu to access the Select a Troubleshooting Category to Edit or Delete page:

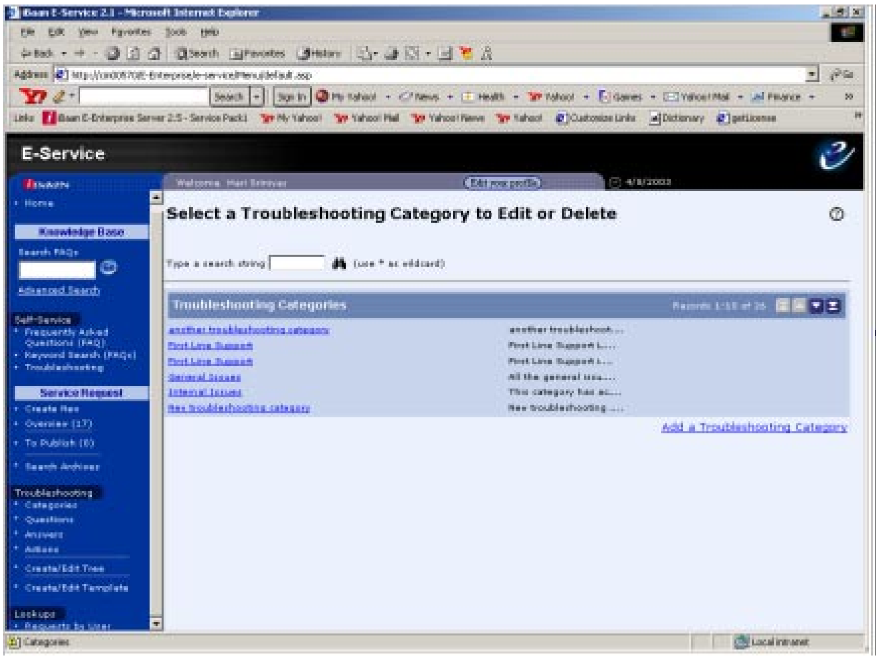

Figure 5-42 Select a Troubleshooting Category to Edit or Delete page

This page enables the publisher to enter and maintain the troubleshooting categories.

This page contains the following fields:

Fields	Description
Name	The name used to identify the troubleshooting category.
Details	The details related to the troubleshooting category.

Use the hyperlink available for the **Name** to access the Edit/Delete Troubleshooting Category page.

Use the Add a Troubleshooting Category page to create a new troubleshooting category.

Add a troubleshooting category

This section describes the procedure the publisher must use to add a new troubleshooting category.

The publisher can use the **Categories** link on the E-Service menu to access the Select a Troubleshooting Category to Edit or Delete page.

On this page, the publisher can use the **Create New Troubleshooting Category** link to access the Add a Troubleshooting Category page:

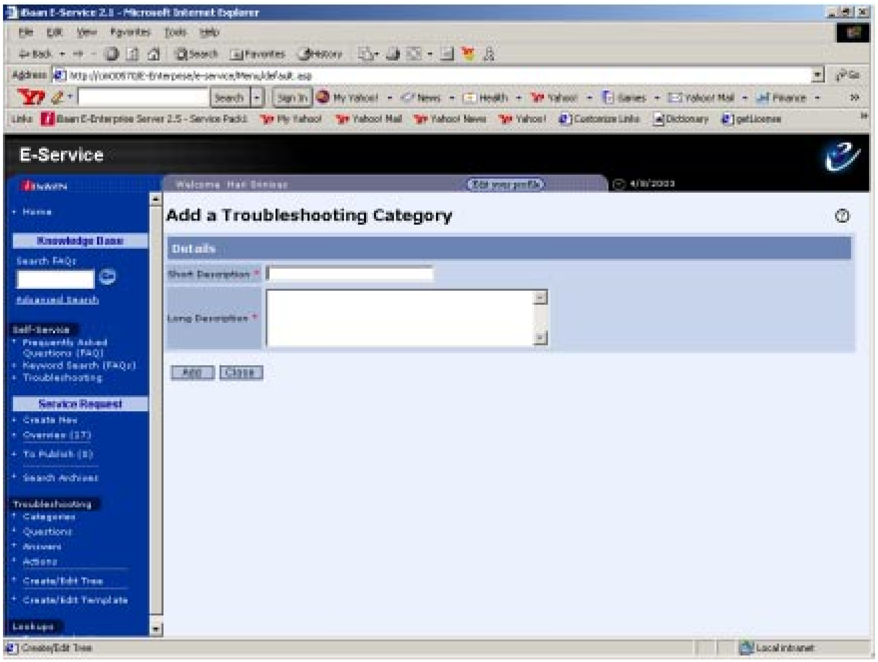

Figure 5-43 Add a Troubleshooting Category page

Enter the following details on this page:

- **Short Description:**
  The description used to identify the troubleshooting category.
- **Long Description:**
  The detailed description used to elaborate and describe the troubleshooting category.
- Click **Add** to create a new troubleshooting category.
- Click **Close** to go back to the Select a Troubleshooting Category to Edit or Delete page.

Edit or delete troubleshooting category

This section describes the procedure the publisher must use to edit or delete a troubleshooting category.

The publisher can access this page by using the **Categories** link on the E-Service menu to access the Select a Troubleshooting Category to Edit or Delete page.

On this page, the publisher must use the hyperlink available for the name of the troubleshooting category to access the Edit or Delete a Troubleshooting Category page:

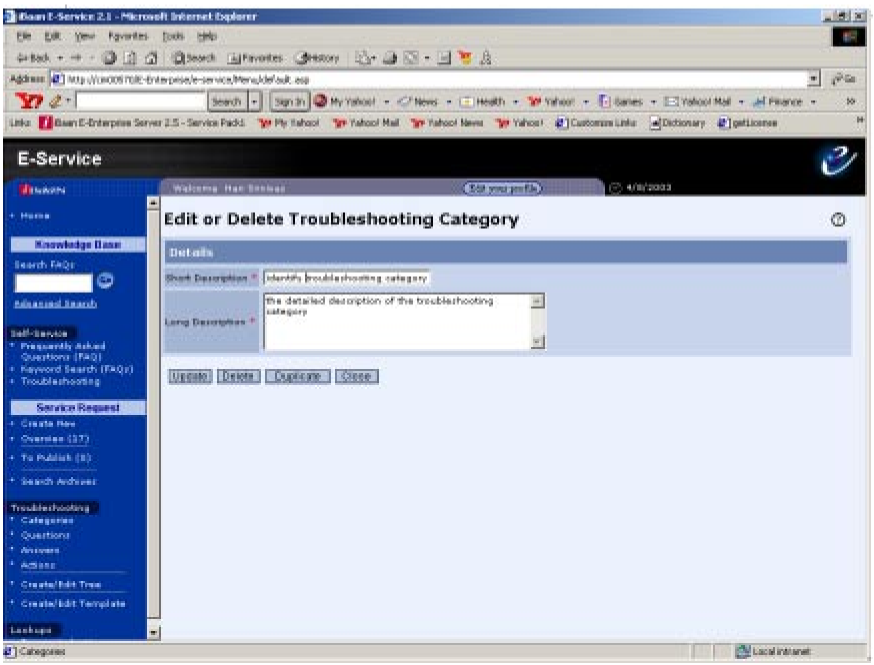

Figure 5-44 Edit or Delete Troubleshooting Category page

You can view and modify the following details on this page:

- **Short Description:**
  The description used to identify the troubleshooting category.
- **Long Description:**
  The detailed description used to elaborate and describe the troubleshooting category.
- Click **Update** to save the changes made to the troubleshooting category.
- Click **Delete** to remove the troubleshooting category from the repository.
- Click **Duplicate** to create another troubleshooting category with the same details.

- Click **Close** to go back to the Select a Troubleshooting Category to Edit or Delete page.

Questions

The publisher can use the **Questions** option on the E-Service menu to access the Select a Question to Edit or Delete page:

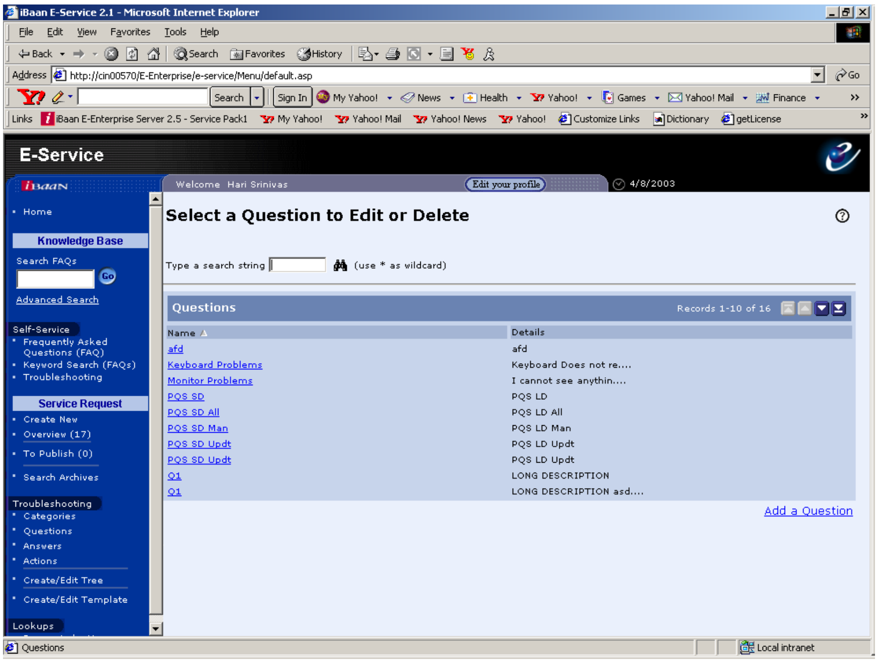

Figure 5-45 Select a Question to Edit or Delete page

This page enables the publisher to enter and maintain the questions.

This page contains the following fields:

Fields	Description
Name	The name used to identify the question.
Details	The details related to the question.

Use the hyperlink available for the **Name** to access the Edit or Delete Question page.

Use the Add a Question page to create a new question.

Add a question

This section describes the procedure the publisher must use to add a new question.

The publisher can access this page by using the **Questions** link on the E-Service menu to access the Select a Question to Edit or Delete page.

On this page, the publisher can use the **Add a Question** link to access the Add a Question page:

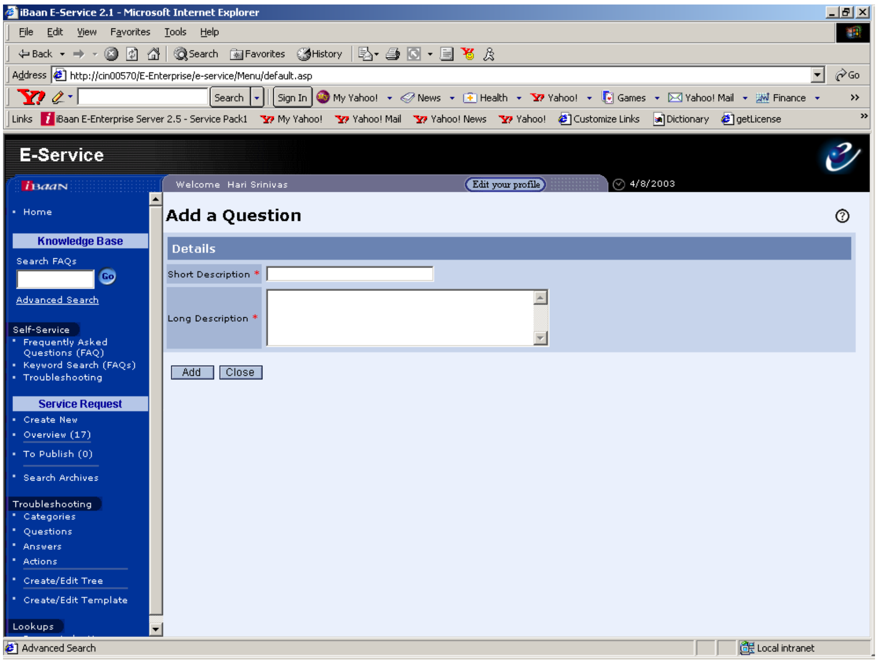

Figure 5-46 Add a Question page

You can enter the following details on this page:

- **Short Description:**
  The description used to identify the question.
- **Long Description:**
  The detailed description used to elaborate and describe the question.
- Click **Add** to create a new question.
- Click **Close** to go back to the Select a Question to Edit or Delete page.

Edit or delete a question

This section describes the procedure the publisher must use to edit or delete a question.

The publisher can access this page by using the **Questions** link on the E-Service menu to access the Select a Question to Edit or Delete page.

On this page, the publisher must use the hyperlink available for the name of the question to access the Edit or Delete a Question page:

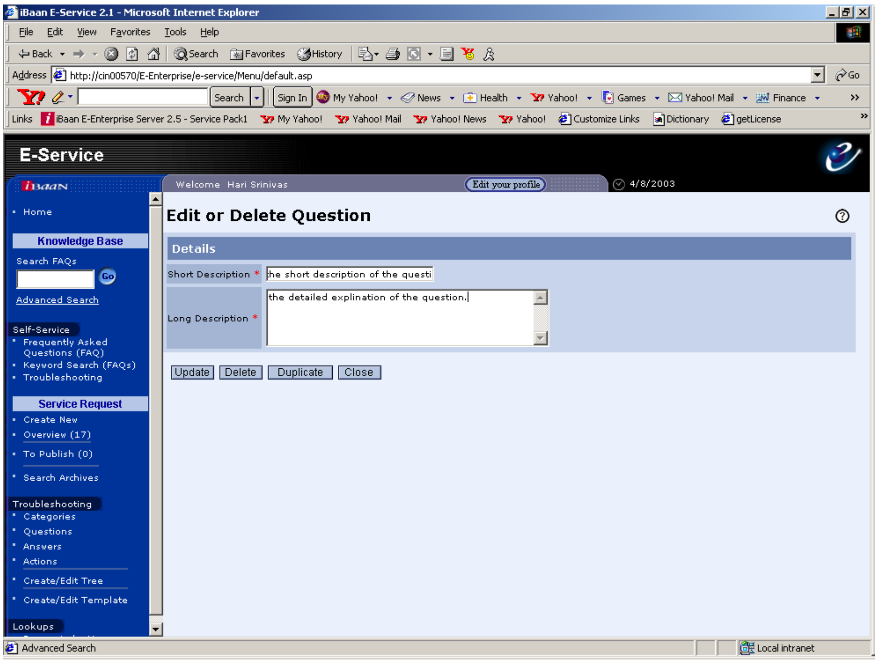

Figure 5-47 Edit or Delete Question page

You can view and modify the following details on this page:

- **Short Description:**
  The description used to identify the question.
- **Long Description:**
  The detailed description used to elaborate and describe the question.
- Click **Update** to save the changes made to the question.
- Click **Delete** to remove the question from the repository.
- Click **Duplicate** to create another question with the same details.

- Click **Close** to go back to the Select a Question to Edit or Delete page.

Answers

The publisher can use the **Answers** option on the E-Service menu to access the Select an Answer to Edit or Delete page:

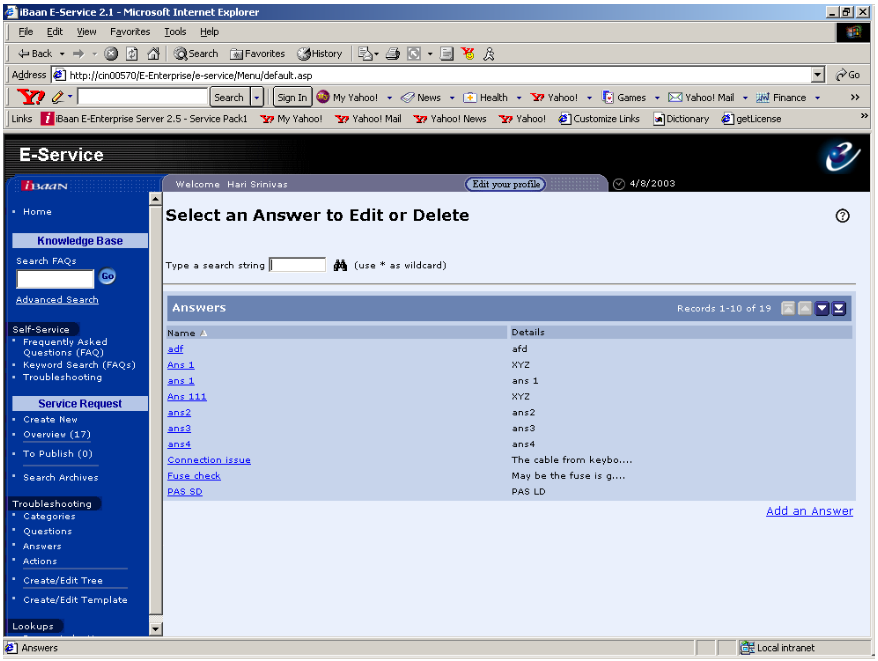

Figure 5-48 Select an Answer to Edit or Delete page

This page enables the publisher to enter and maintain the answers.

This page contains the following fields:

Fields	Description
Name	The name used to identify the answer.
Details	The details related to the answer.

Use the hyperlink available for the name to access the Edit or Delete Answer page.

Use the Add an Answer page to create a new answer.

Add an answer

This section describes the procedure the publisher must use to add a new answer.

To access this page, the publisher can use the **Answers** link on the E-Service menu to access the Select an Answer to Edit or Delete page.

On this page, the publisher can use the **Add an Answer** link to access the Add an Answer page:

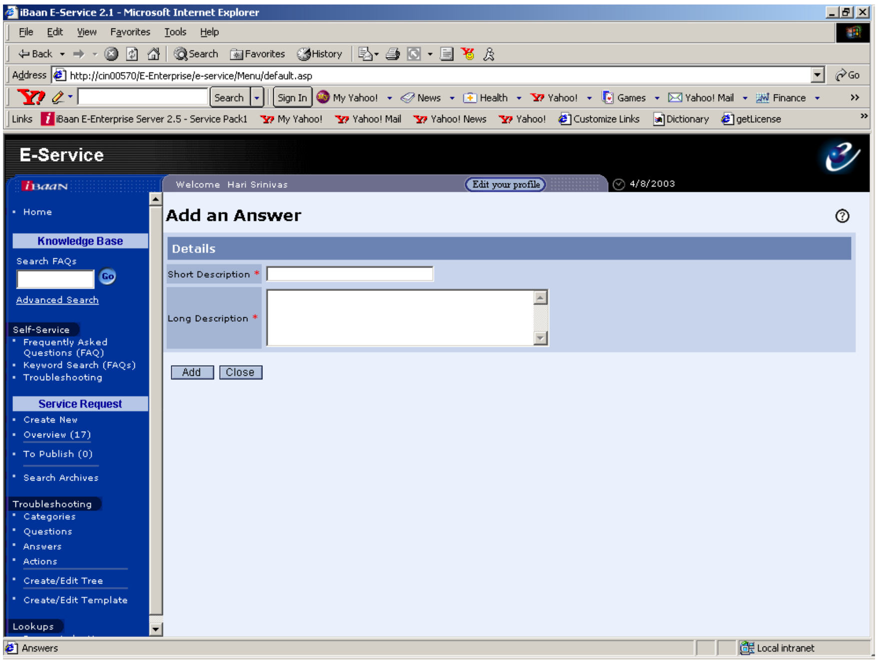

Figure 5-49 Add an Answer page

Enter the following details on this page:

- **Short Description:**
  The description used to identify the answer.
- **Long Description:**
  The detailed description used to elaborate and describe the answer.
- Click **Add** to create a new answer.
- Click **Close** to go back to the Select an Answer to Edit or Delete page.

Edit or delete answer

This section describes the procedure the publisher must use to edit or delete an answer.

To access this page, the publisher can use the **Answers** link on the E-Service menu to access the Select an Answer to Edit or Delete page.

On this page, the publisher must use the hyperlink available for the name of the answer to access the Edit or Delete an Answer page:

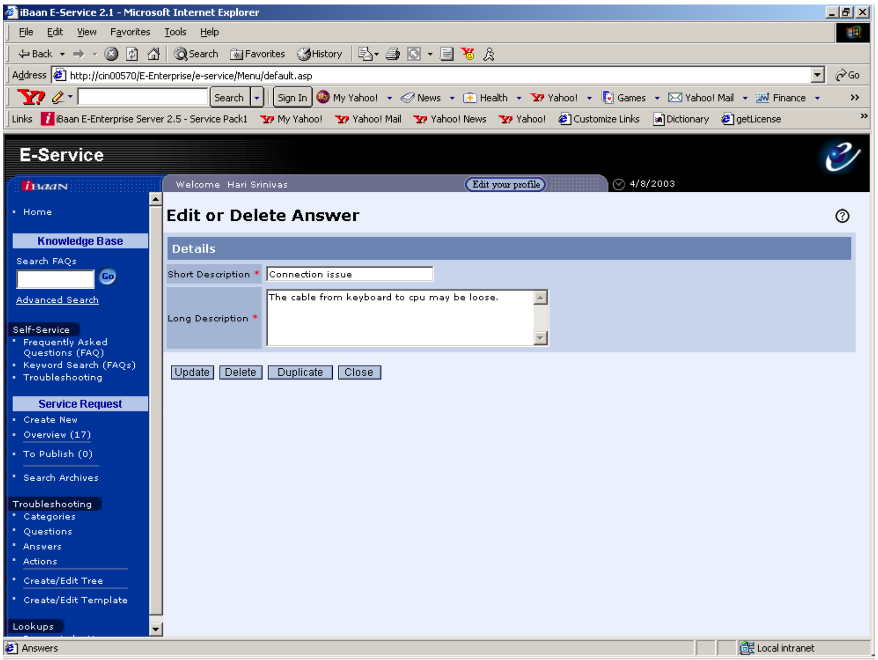

Figure 5-50 Edit or Delete Answer page

You can view and modify the following details on this page:

- **Short Description:**
  The description used to identify the answer.
- **Long Description:**
  The detailed description used to elaborate and describe the answer.
- Click **Update** to save the changes made to the answer.
- Click **Delete** to remove the answer from the repository.
- Click **Duplicate** to create another answer with the same details.
- Click **Close** to go back to the Select an Answer to Edit or Delete page.

Actions

The publisher can use the **Actions** option on the E-Service menu to access the Select an Action to Edit or Delete page:

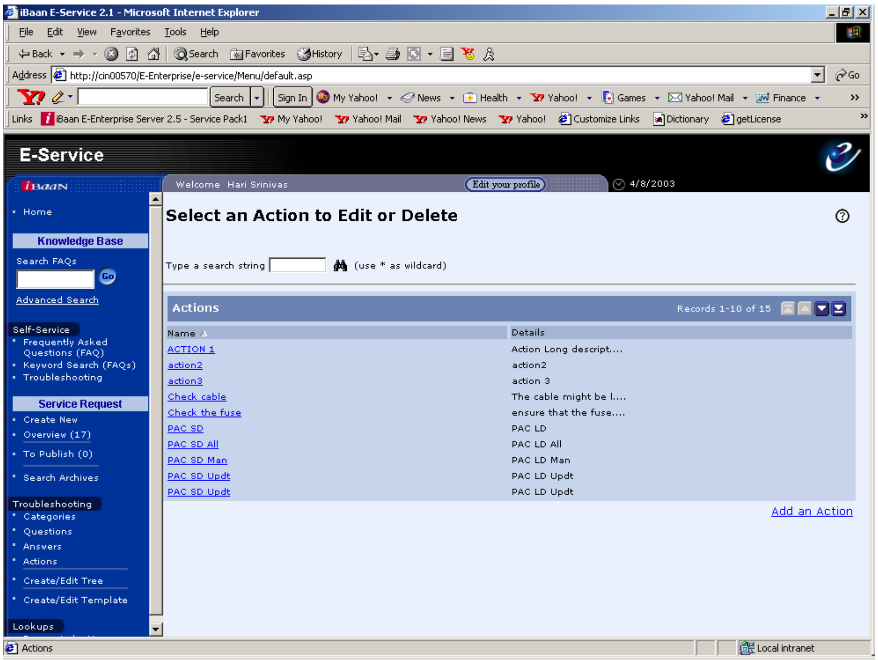

Figure 5-51 Select an Action to Edit or Delete page

This page enables the publisher to enter and maintain the actions.

This page contains the following fields:

Fields	Description
Name	The name used to identify the action.
Details	The details related to the action.

Use the hyperlink available for the name to access the Edit or Delete Action page.

Use the Add an Action page to create a new action.

Add an action

This section describes the procedure the publisher must use to add a new action.

To access this page, the publisher can use the **Actions** link on the E-Service menu to access the Select an Action to Edit or Delete page.

On this page, the publisher can use the **Add an Action** link to access the Add an Action page:

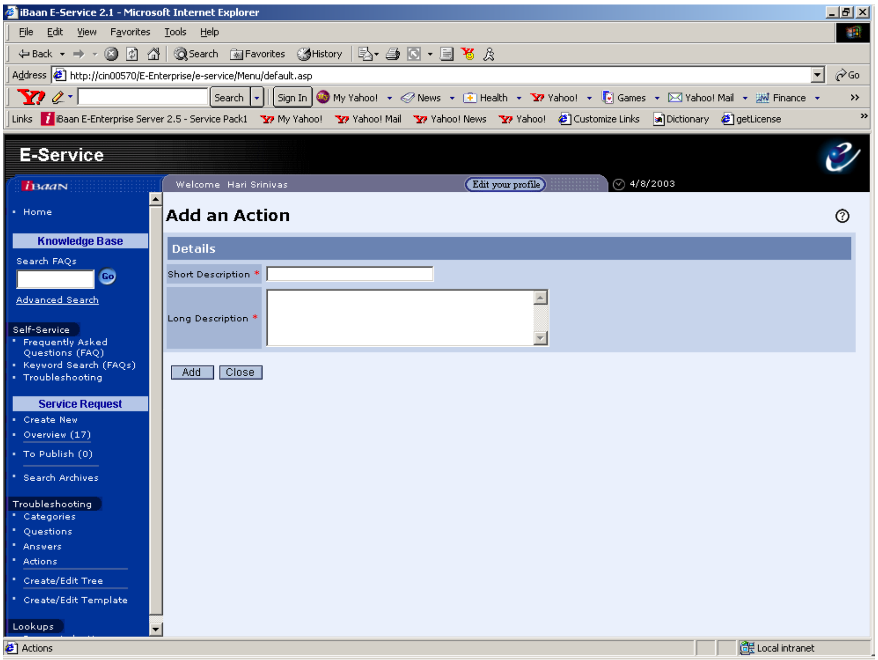

Figure 5-52 Add an Action page

Enter the following details on this page:

- **Short Description:**
  The description used to identify the action.
- **Long Description:**
  The detailed description used to elaborate and describe the action.
- Click **Add** to create a new action.
- Click **Close** to go back to the Select an Action to Edit or Delete page.

Edit or delete an action

This section describes the procedure the publisher must use to edit or delete an action.

To access this page, the publisher can use the **Actions** link on the E-Service menu to access the Select an Action to Edit or Delete page.

On this page, the publisher must use the hyperlink available for the **Name** of the action to access the Edit or Delete an Action page:

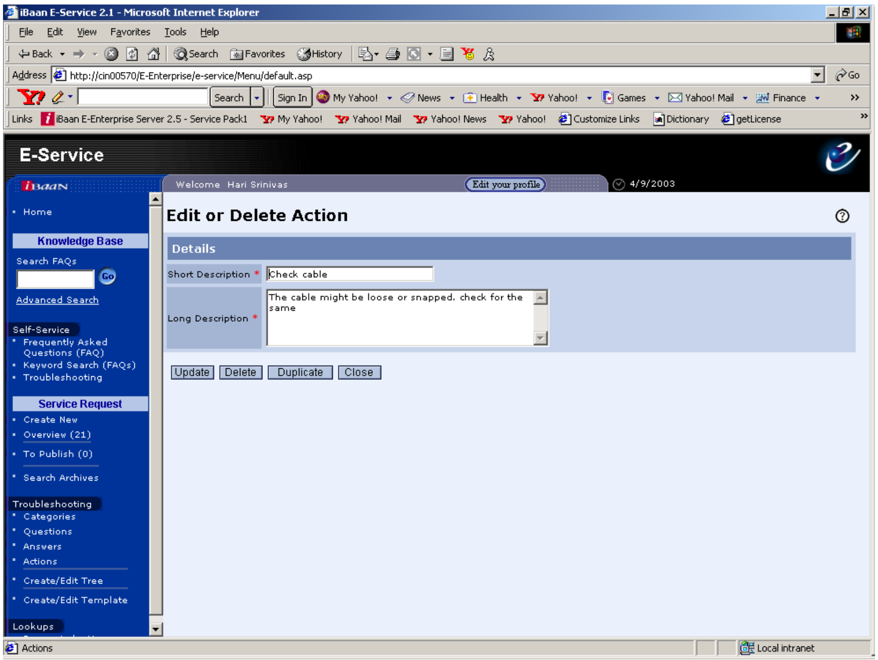

Figure 5-53 Edit or Delete Action page

View and modify the following details on this page:

- **Short Description:**
  The description used to identify the Action.
- **Long Description:**
  The detailed description used to elaborate and describe the action.
- Click **Update** to save the changes made to the action.
- Click **Delete** to remove the action from the repository.
- Click **Duplicate** to create another action with the same details.
- Click **Close** to go back to the Select an Action to Edit or Delete page.

Create and publish troubleshooting tree

This section describes the procedure the publisher must use to create a troubleshooting tree.

Use the **Create/Edit Tree** link in the Navigation pane to access the Create/Edit Tree page:

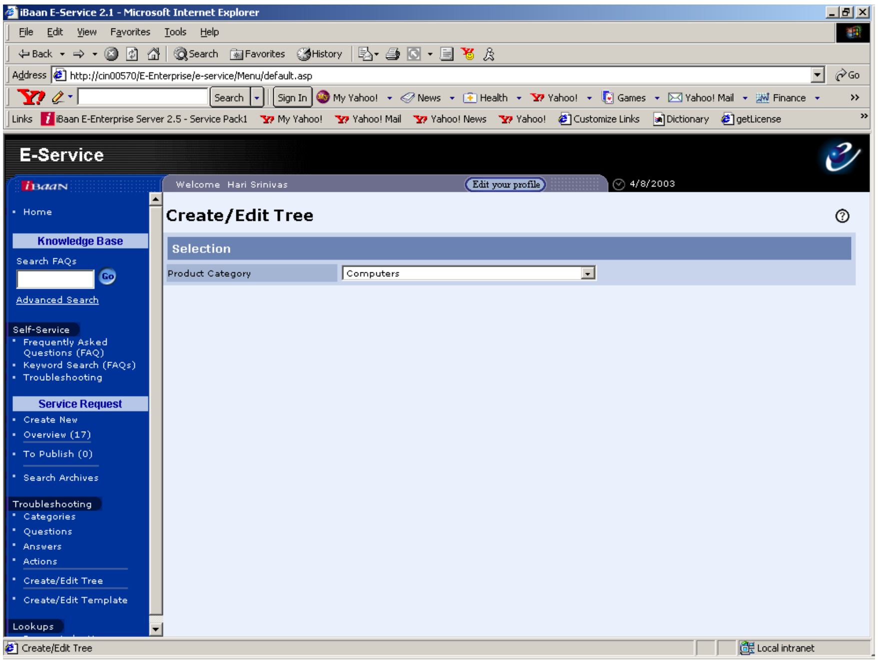

Figure 5-54 Create/Edit Tree page

You can initially view the Selection pane, which contains the **Product Category** field.

Select a product category to access the **Product** field in the same pane.

Select a product specific to the product category in the same pane.

You can now view the Troubleshooting pane below the Selection pane, which displays the product category and product you selected.

If a troubleshooting tree is already available for the specific product category and product combination, you can view the troubleshooting tree in the Troubleshooting pane, as shown in the following figure:

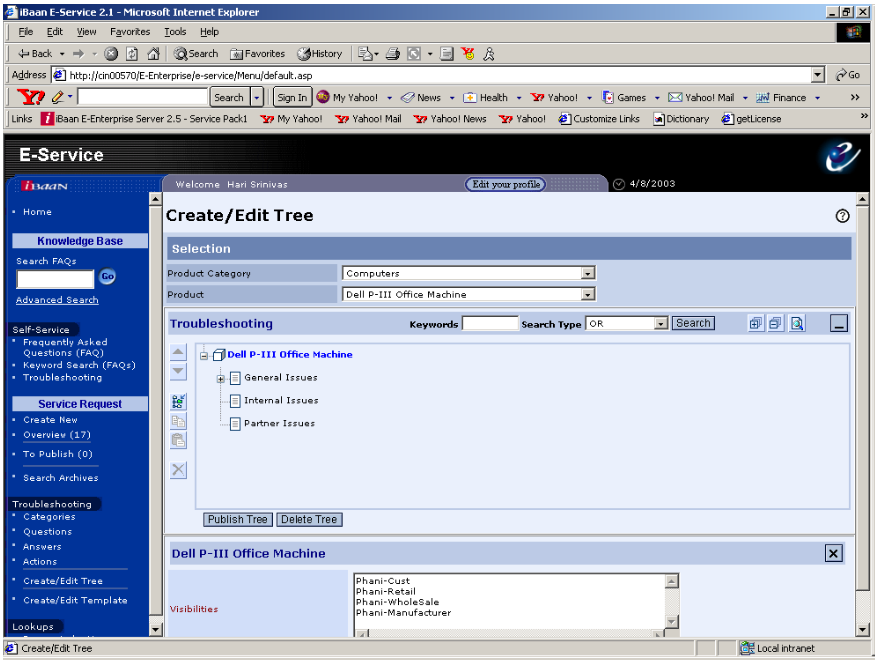

Figure 5-55 Create/Edit Tree page

However, if no troubleshooting tree is available for the specific product category and product you selected in the Selection pane, you can view the following options in the Troubleshooting pane:

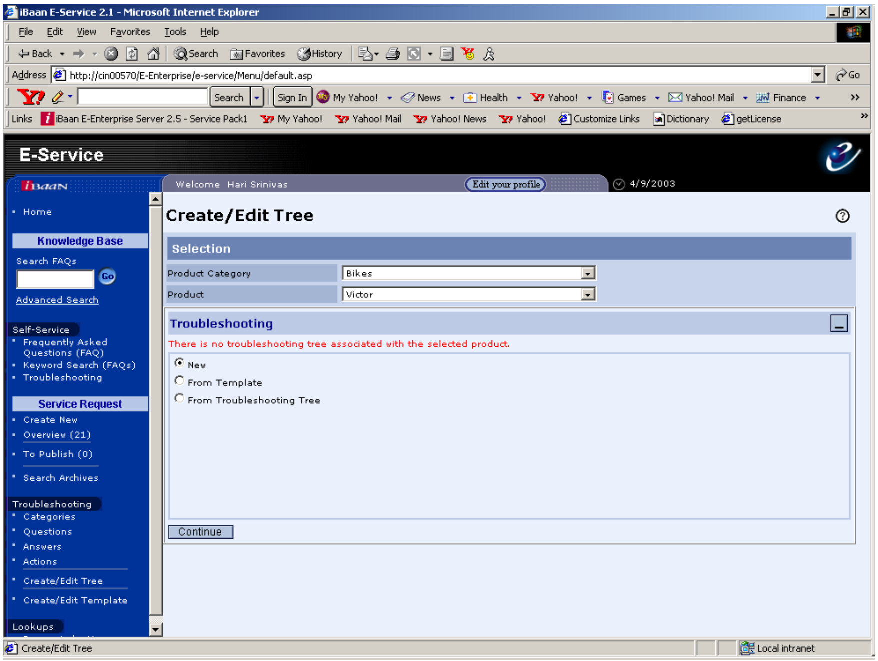

Figure 5-56 Create/Edit Tree page

Select the required check box to create a troubleshooting tree.

- **New**:
  Use this option to create the tree again. The user must create the tree from scratch, that is, attach each and every node to build the tree.
- **From Template**:
  Use this option to create the tree from an existing template. The template provides the user with a basic troubleshooting tree structure. By using the **From Template** option, the user can copy the basic structure and edit it to create a troubleshooting tree for the specific product category and product combination.
- **From another Tree**:
  Use this option to create the tree from another troubleshooting tree. The user can copy the basic structure and edit the tree for the specific product category and product combination.

The following sections describe the procedure the user must use to create a new tree by using either one of the options mentioned previously and to edit an existing tree.

Create new troubleshooting tree

This section describes the procedure the user must use to create a new troubleshooting tree.

If a troubleshooting tree is not available for a specific product category and product combination you selected in the Selection pane and select the **New** option on the Troubleshooting pane in the Create/Edit Troubleshooting Tree page, you can create a new troubleshooting tree:

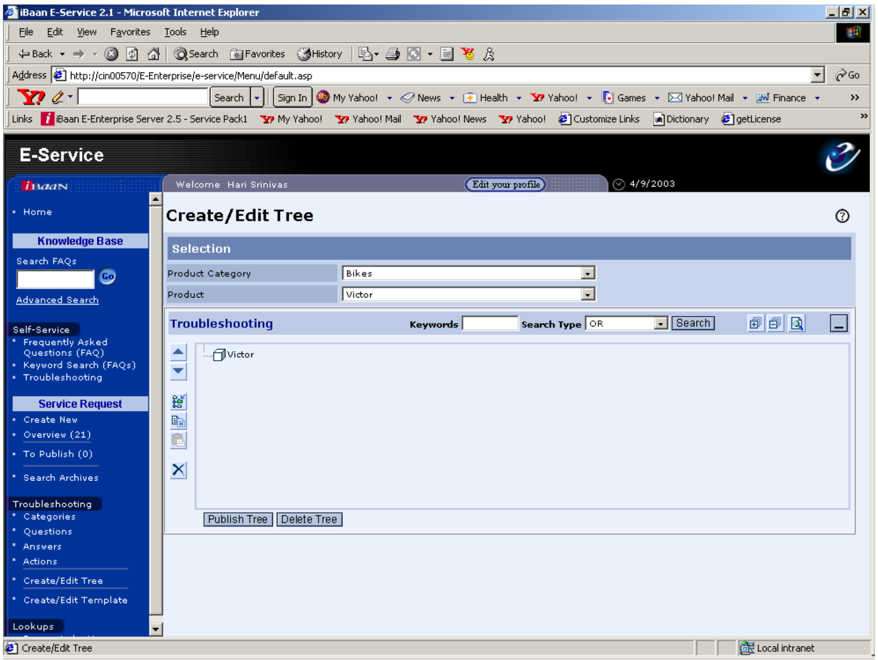

Figure 5-57 Create/Edit Tree page

The Troubleshooting pane displays only the product you have selected, for which you must create a troubleshooting tree.

Click the Product node in the Troubleshooting pane to view the visibilities attached to the product node in the Visibilities pane. For more details, refer to “Visibilities,” later in this chapter.

The Troubleshooting pane contains the following icons:

Use these icons to do the following:

- Move the node up on the same level
- Move the node down on the same level
- Add a child entity
- Copy a node
- Paste a node. To enable this option, you must copy a node.
- Delete a node

You must use the **Add Child** option to add the various nodes to the troubleshooting tree.

You can now view the Child Entity pane, as shown in the following figure:

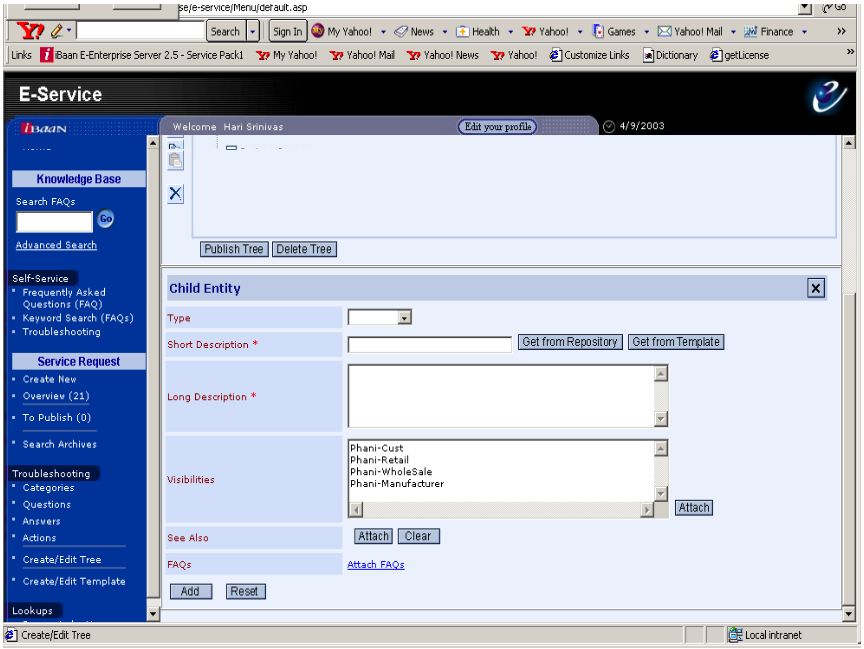

Figure 5-58 Child Entity pane - Create/ Edit Tree page

- Use the options available in this pane to add new nodes to the troubleshooting tree.
- Select the type of node you must attach to the tree. You can attach only a troubleshooting category as the first level of the tree. To a troubleshooting category, you can attach a question, answer or action and create a tree.
- You can enter the **Short Description** and **Long Description** or you can use the **Get From Repository** and **Get from Template** options.
- If you use the **Get from Repository** option, you can view a list of all the troubleshooting categories, questions, answers, or actions that are available in the repository in a new page. You must select the required node and add it to the tree. For example, if you select Question as the type of node, and use the **Get from Repository** option, you can view all the questions that are available on the database. Similarly, if you select a Troubleshooting Category, Answer, or Action as the type of node, you can view the related page, which displays a list of troubleshooting categories, answers, or actions, respectively. You can select one of the nodes and add the node to the tree.

- If you use the **Get from Template** option, you can view a list of all the templates that are related to the specific type of node you have selected. You can select the required node and add the node to the tree.
- After you select a node from the repository or the template, you can no longer make any modification to the short description and long description. In that case, you must use the **Reset** option to clear the nodes you have selected and either reselect a node or enter the content in the **Short Description** and **Long Description** fields.
- You can view the visibilities that are attached to the node you have selected. You can use the **Attach** option to add or remove the visibilities.
- You can use **Attach** option available in the **See Also** field to add a link to another node in the troubleshooting tree. After you attach the link, you can use the **Clear** option to remove the link and enter another link.
- You can use the **Attach FAQs** option in the **FAQs** field to add a Frequently Asked Question as a link to a node in the troubleshooting tree.
- Click **Add** to add the new node to the troubleshooting tree.

If you select a node in the troubleshooting tree, then, based on the node you have selected, you can view one of the related panes, which include the following:

- Troubleshooting Category pane
- Question pane
- Answer pane
- Action pane

Based on the node you have selected, you can view one of these panes as the third pane on the Create/Edit Tree page.

For example, in the following figure, you can view the Answer pane:

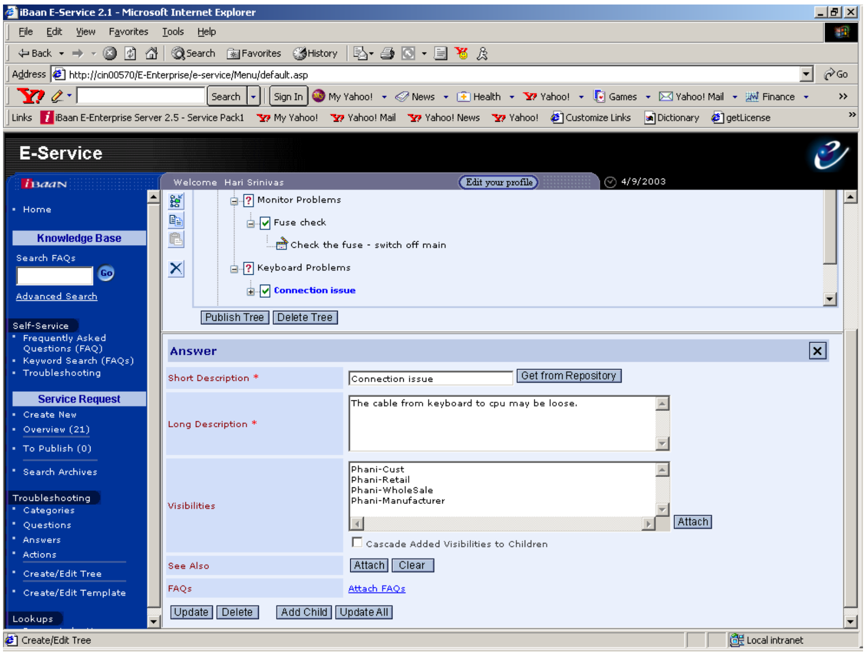

Figure 5-59 Answer pane

The Troubleshooting Category, Question, Answer, and Action panes contain the following fields and options:

- You can view the **Short and Long description** of the node in this pane. For example, if you select a troubleshooting category, you can view the short and long description of the troubleshooting category, and so on.
- You can use the **Get from Repository** option to replace the node with another node from the database.
- You can view the **Visibilities** attached to the node. You can use the **Attach** option to add or remove the visibilities.
- The changes you make to the visibilities are applicable only for the specific node.
- If you have added new visibilities, you can select the **Cascade Added Visibilities to Children** check box to attach the new visibilities you have added for a specific node to all the child nodes.

- Use the **Attach** option in the **See Also** field to add a link to another node in the troubleshooting tree. You can use the **Clear** option in the **See Also** field to clear the existing links.
- Use the options available in the **FAQs** field to add a link to the Frequently Asked Questions to the specific node.
- Click **Update** to save the changes you have made to the node. Changes are node- specific.
- Click **Delete** to remove the node.
- Click **Add Child** to add a child entity to the node.
- Click **Update All** to modify the node wherever the node is used. The node can be used in as another node in the same troubleshooting tree, or in another troubleshooting tree or template. Irrespective of where the node is used, the content of the node is modified if you use this option. Even if another user is modifying the template or tree, the content of the node is updated. The user must exercise great caution while using this option.

Create troubleshooting tree from another tree

This section describes the procedure you must use to create a troubleshooting tree from another tree.

After you select a product category and product on the Create/Edit Tree page, and a troubleshooting tree is not available for the specific combination, you can specify the procedure you must use to create a new tree by using the options available in the Troubleshooting pane.

If you select the **From Troubleshooting Tree** option in the Troubleshooting pane, you can access a new page.

In the new page, you must select the product category to view a list of all the existing troubleshooting trees, as shown in the following figure:

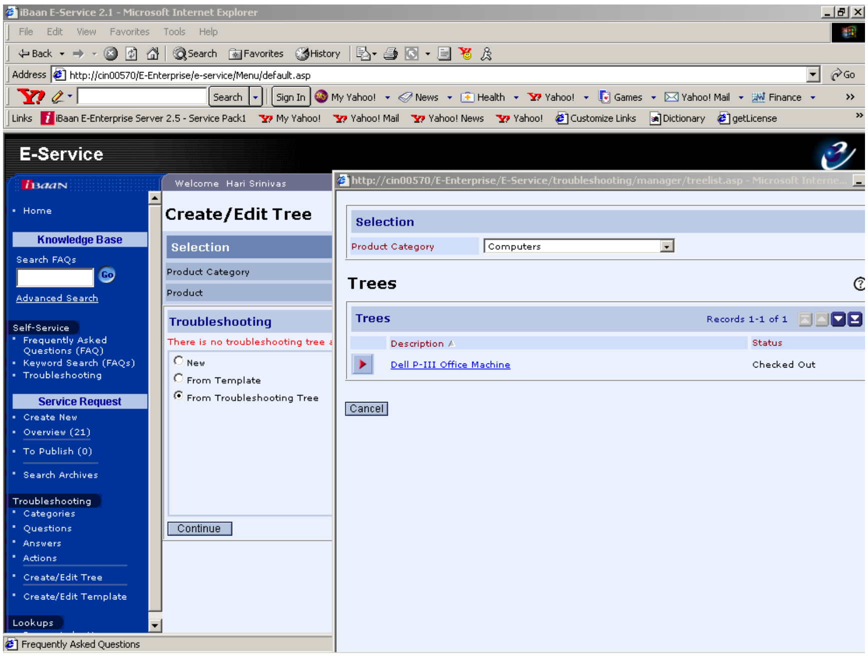

Figure 5-60 Create/Edit Tree page, Trees pane

You can select and customize an existing troubleshooting tree to create a tree for the specific combination.

The troubleshooting tree you selected appears in the Troubleshooting pane:

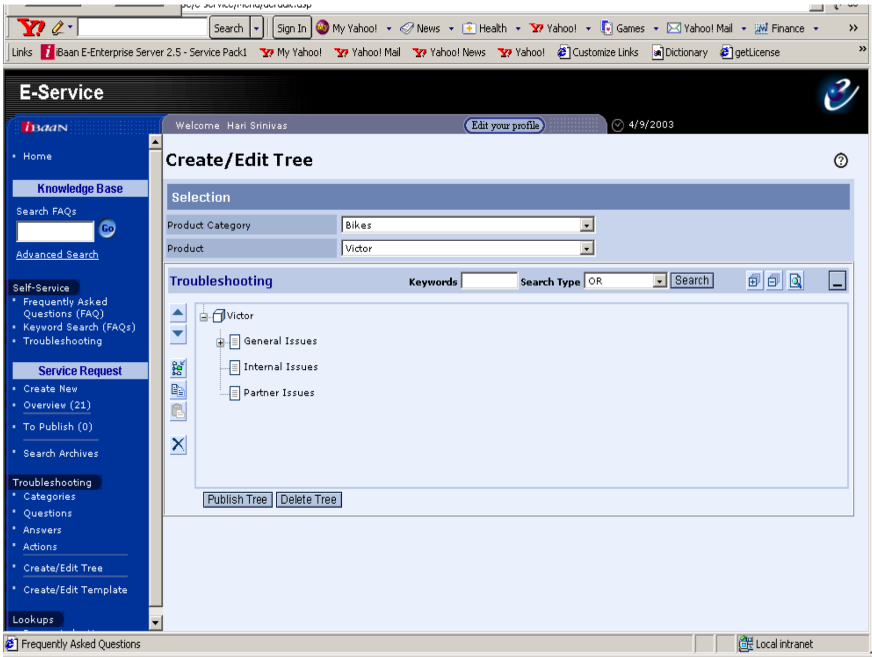

Figure 5-61 Create/Edit Tree page

The Troubleshooting pane displays the tree you have selected, which you can customize to create a troubleshooting tree for the specific product category and product combination.

If you select the product, you can view the visibilities attached to the product in the Visibilities pane. For more information, refer to “Visibilities,” later in this chapter.

The Troubleshooting pane contains the following icons:

Use these icons to do the following:

- Move the node up on the same level
- Move the node down on the same level
- Add a child entity
- Copy a node
- Paste a node. To enable this option, you must copy a node.
- Delete a node

You must use the **Add Child** option to add the various nodes to the troubleshooting tree.

You can now view the Child Entity pane, as shown in the following figure:

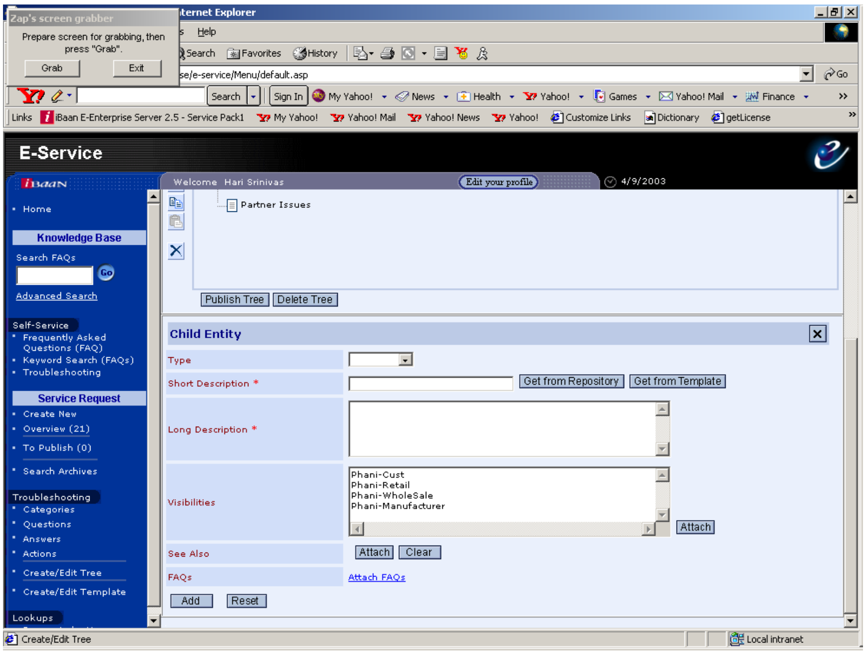

Figure 5-62 Child Entity pane - Create/ Edit Tree page

- Use the options available in this pane to add new nodes to the troubleshooting tree.
- Select the type of node you must attach to the tree. You can attach only a troubleshooting category as the first level of the tree. To a troubleshooting category you can attach a question, answer or action and create a tree.
- You can enter the **Short Description** and **Long Description** or you can use the **Get From Repository** and **Get from Template** options.
- If you use the **Get from Repository** option, you can view a list of all the troubleshooting categories, questions, answers, or actions that are available in the repository in a new page. You must select the required node and add the node to the tree. For example, if you select Question as the type of node, and use the **Get from Repository** option, you can view all the questions that are available in the database. Similarly, if you select a Troubleshooting Category, Answer, or Action as the type of node, you can view the related page, which displays a list of troubleshooting categories, answers or actions, respectively. You can select one of the nodes and add the node to the tree.

- If you use the **Get from Template** option, you can view a list of all the templates that are related to the specific type of node you have selected. You can select the required node and add the node to the tree.
- After you select a node from the repository or the template, you cannot make any modification to the short description and long description. In that case, you must use the **Reset** option to clear the nodes you have selected and either reselect a node or enter the content in the **Short** and **Long Description** fields.
- You can view the visibilities that are attached to the node you have selected. You can use the **Attach** option to add or remove the visibilities.
- You can use **Attach** option available in the **See Also** field to add a link to another node in the troubleshooting tree. After you attach the node, you can use the **Clear** option to remove the link and enter another link.
- You can use the **Attach FAQs** option in the **FAQs** field to add a Frequently Asked Question as a link to a node in the troubleshooting tree.
- Click **Add** to add the new node to the troubleshooting tree.

If you select a node in the troubleshooting tree, based on the node you have selected, you can view one of the related panes, which include the following:

- Troubleshooting Category pane
- Question pane
- Answer pane
- Action pane

Based on the node you have selected, you can view one of these panes as the third pane on the Create/Edit Tree page.

For example, in the following figure, you can view the Troubleshooting Category pane:

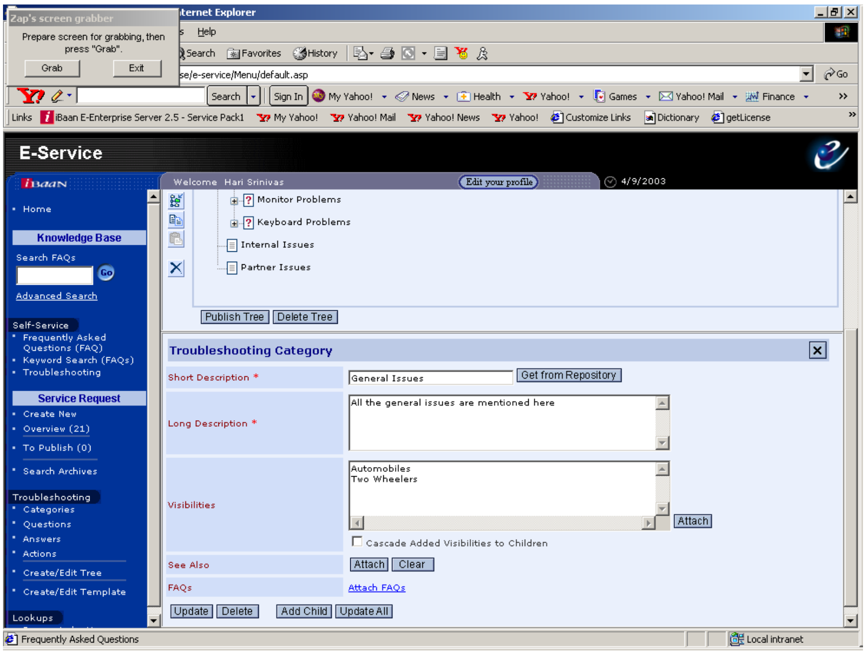

Figure 5-63 Troubleshooting Category pane

The Troubleshooting Category, Question, Answer, and Action panes contain the following fields and options:

- You can view the short and long description of the node in this pane. For example, if you select a troubleshooting category, you can view the short and long description of the troubleshooting category and so on.
- You can use the **Get from Repository** option replace the node with another node from the database.
- You can view the **Visibilities** attached to the node. You can use the **Attach** option to add or remove the visibilities.
- The changes you make to the visibilities are applicable only for the specific node.
- If you have added new visibilities, you can select the **Cascade Added Visibilities to Children** check box to attach the new visibilities you have added for a specific node to all the child nodes.

- Use the **Attach** option in the **See Also** field to add a link to another node in the troubleshooting tree. You can use the **Clear** option in the **See Also** field to clear the existing links.
- Use the options available in the **FAQs** field to add a link to the frequently asked questions to the specific node.
- Click **Update** to save the changes you have made to the node. Changes are specific node.
- Click **Delete** to remove the node.
- Click **Add Child** to add a child entity to the node.
- Click **Update All** to modify the node wherever the node is used. The node can be used in another node in the same troubleshooting tree, or in another troubleshooting tree or template. Irrespective of where the node is used, the content of the node is modified if you use this option. Even if another user is modifying the template or tree, the content of the node is updated. The user must exercise great caution while using this option.

Create troubleshooting tree from template

This section describes the procedure you must use to create a troubleshooting tree from a template.

After you select a product category and product on the Create/Edit Tree page, and a troubleshooting tree is not available for the specific combination, you can specify the procedure you must use to create a new tree.

If you select the **From Template** option you can access a page that displays a list of all the relevant templates, as shown in the following figure:

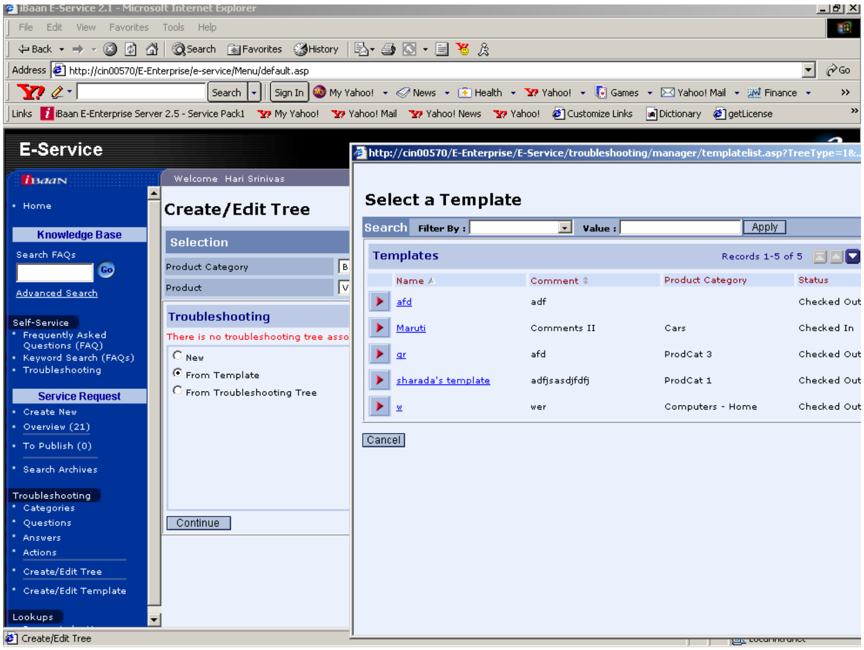

Figure 5-64 Create/Edit Tree page, Select a Template page

You can select an existing template and customize the template to create a tree for the specific combination.

The template you select appears in the Troubleshooting pane:

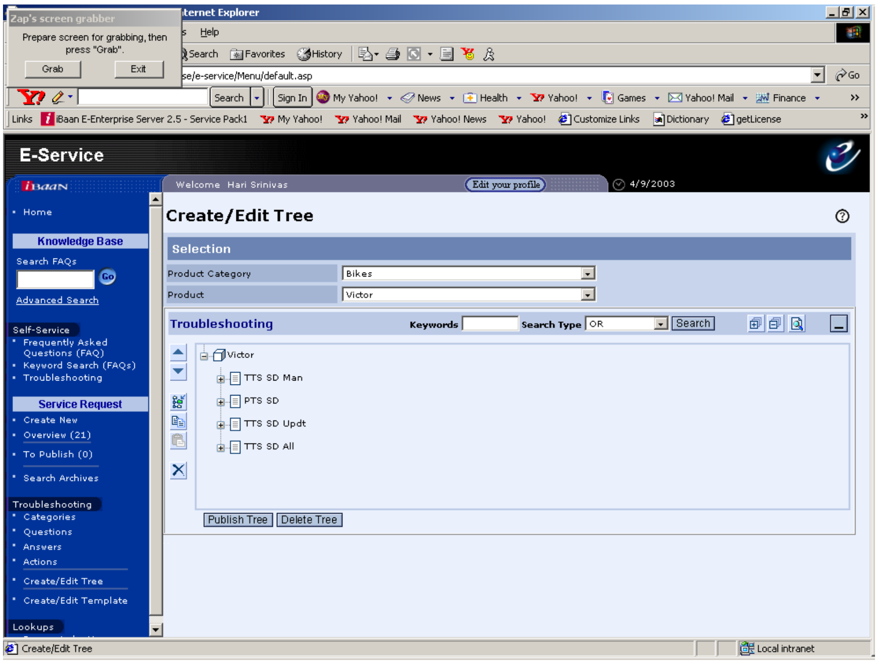

Figure 5-65 Create/Edit Tree page

The Troubleshooting pane displays the template you have selected, which you must customize to create a troubleshooting tree for the specific product category and product combination.

If you select the product, you can view the visibilities attached to the product in the Visibilities pane. For more information, refer to “Visibilities,” later in this chapter.

The Troubleshooting pane contains the following icons:

Use these icons to do the following:

- Move the node up on the same level.
- Move the node down on the same level.
- Add a child entity.
- Copy a node.
- Paste a node. To enable this option, you must copy a node.
- Delete a node

You must use the **Child Entity** option to add the various nodes to the troubleshooting tree.

You can now view the Child Entity pane, as shown in the following figure:

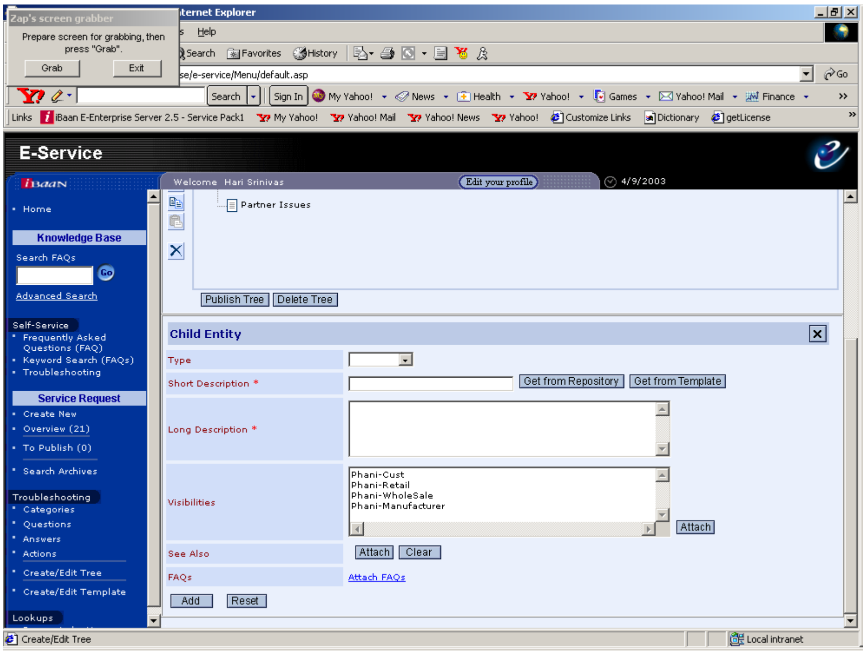

Figure 5-66 Child Entity pane - Create/ Edit Tree page

- Use the options available in this pane to add new nodes to the troubleshooting tree.
- Select the type of node you must attach to the tree. You can attach only a troubleshooting category as the first level of the tree. To a troubleshooting category, you can attach a question, answer, or action and create a tree.
- You can enter the **Short Description** and **Long Description** or you can use the **Get From Repository** and **Get from Template** options.
- If you use the **Get from Repository** option, you can view a list of all the Troubleshooting categories, questions, answers, or actions that are available in the repository on a new page. You must select the required node and add the node to the tree. For example, if you select Question as the type of node and use the **Get from Repository** option, you can view all the questions that are available in the database. Similarly, if you select a Troubleshooting Category, Answer, or Action as the type of node, you can view the related page, which displays a list of Troubleshooting Categories, Answers, or Actions, respectively. You can select one of the nodes and add them to the tree.

- If you use the **Get from Template** option, you can view a list of all the templates that are related to the specific type of node you have selected. You can select the required node and add the node to the tree.
- After you select a node from the repository or the template, you cannot make any modification to the short description and long description. In that case, you must use the **Reset** option to clear the nodes you have selected and either reselect a node or enter the content in the **Short Description** and **Long Description** fields.
- You can view the **visibilities** that are attached to the node you have selected. You can use the **Attach** option to add or remove the visibilities.
- You can use **Attach** option available in the **See Also** field to add a link to another node in the troubleshooting tree. After you attach the link, you can use the **Clear** option to remove the link and enter another link.
- You can use the **Attach FAQs** option in the **FAQs** field to add a Frequently Asked Question as a link to a node in the troubleshooting tree.
- Click **Add** to add the new node to the troubleshooting tree.

If you select a node in the troubleshooting tree, then, based on the node you have selected, you can view one of the related panes, which include the following:

- Troubleshooting Category pane
- Question pane
- Answer pane
- Action pane

Based on the node you have selected, you can view one of these panes as the third pane on the Create/Edit Tree page.

For example, in the following figure, you can view the Troubleshooting Category pane:

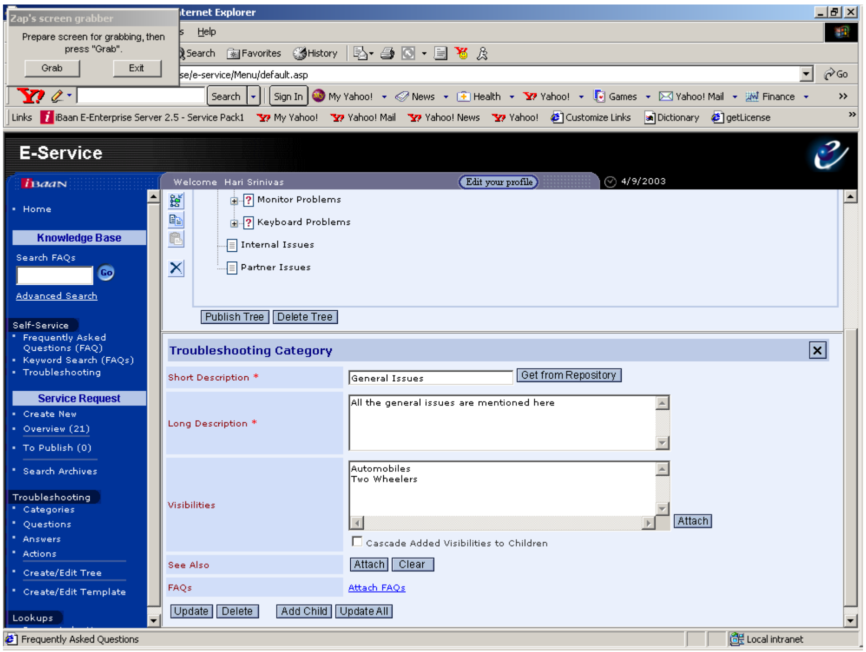

Figure 5-67 Troubleshooting Category pane

The Troubleshooting Category, Question, Answer, and Action panes contain the following fields and options:

- You can view the **Short Description** and **Long Description** of the node in this pane. For example, if you select a troubleshooting category, you can view the short and long description of the troubleshooting category and so on.
- You can use the **Get from Repository** option replace the node with another node from the database.
- You can view the **Visibilities** attached to the node. You can use the **Attach** option to add or remove the visibilities.
- The changes you make to the visibilities are applicable only for the specific node.
- If you have added new visibilities, you can select the **Cascade Added Visibilities to Children** check box to attach the new visibilities you have added for a specific node to all the child nodes.

- Use the **Attach** option in the **See Also** field to add a link to another node in the troubleshooting tree. You can use the **Clear** option in the **See Also** field to clear the existing links.
- Use the options available in the **FAQs** field to add a link to the Frequently Asked Questions to the specific node.
- Click **Update** to save the changes you have made to the node. Changes are node-specific.
- Click **Delete** to remove the node.
- Click **Add Child** to add a child entity to the node.
- Click **Update All** to modify the node wherever the node is used. The node can be used in as another node in the same troubleshooting tree, or in another troubleshooting tree or template. Irrespective of where the node is used, the content of the node is modified if you use this option. Even if another user is modifying the template or tree, the content of the node is updated. The user must exercise great caution while using this option.

Visibilities

This section describes the procedure you must use to view and add the visibilities for a specific node in the troubleshooting tree.

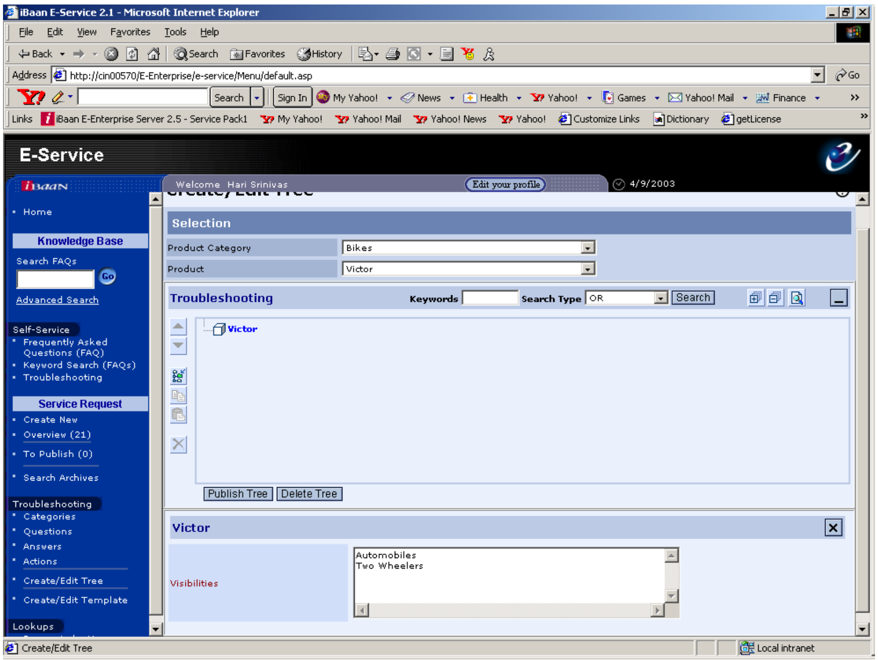

Figure 5-68 Create/Edit Tree page

The administrator can attach visibilities to the product category as well as the users. Based on the visibilities attached to the product category and the users, the administrator can either enable or restrict the users from accessing the specific troubleshooting trees.

For example, if the administrator assigns Vis 1, Vis 2, and Vis 3 as the visibilities for the various nodes in the troubleshooting tree, and has assigned only Vis 1 to the user, the user can view only those nodes of the troubleshooting tree that have Vis 1 in the list of visibilities.

You can use the **Attach** option in the **Visibilities** field to access the Attach Visibilities page:

Figure 5-69 Attach Visibilities windows

Select or clear the required check box to add or remove the visibility.

Click **Attach** to add the visibility to the node.

Click **Close** to go back to the Create/Edit Tree page.

Edit troubleshooting tree

If a troubleshooting tree exists for the product category and product you have selected, you can view the tree in the Troubleshooting pane.

In this case, to edit the existing tree you can use the options available in the Troubleshooting pane.

Use the **Edit Tree** option to make the required modifications.

At any point in time, only one user can edit the content of the tree.

After editing, the user must use the **Publish Tree** option to make the content available to other users who can be classified as registered users, guest users, publishers, and administrators.

NOTE While you create a tree, the user does not have to use the **Edit Tree** option. The tree is automatically in edit mode until the tree is published. After publishing, the user must use the **Edit Tree** option to make additional changes.

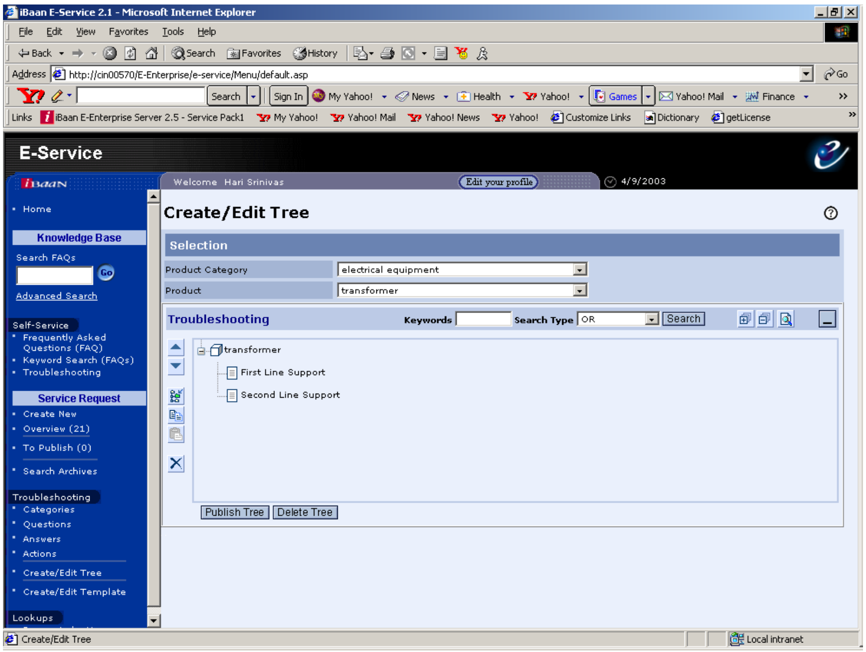

Figure 5-70 Create/Edit Tree page

To edit the tree, the user can use the options available in the Troubleshooting pane to do the following:

- Add node
- Delete node
- Modify node
- Copy and paste the nodes
- Re-order node

If you select the product, you can view the visibilities attached to the product in the Visibilities pane. For more information, refer to “Visibilities,” previously in this chapter.

The Troubleshooting pane contains the following icons:

Use these icons to do the following:

- Move the node up on the same level.
- Move the node down on the same level.
- Add a child entity.
- Copy a node.
- Paste a node. To enable this option, you must copy a node.
- Delete a node.

You must use the **Add Child Entity** option to add the various nodes to the troubleshooting tree.

You can now view the Child Entity pane, as shown in the following figure:

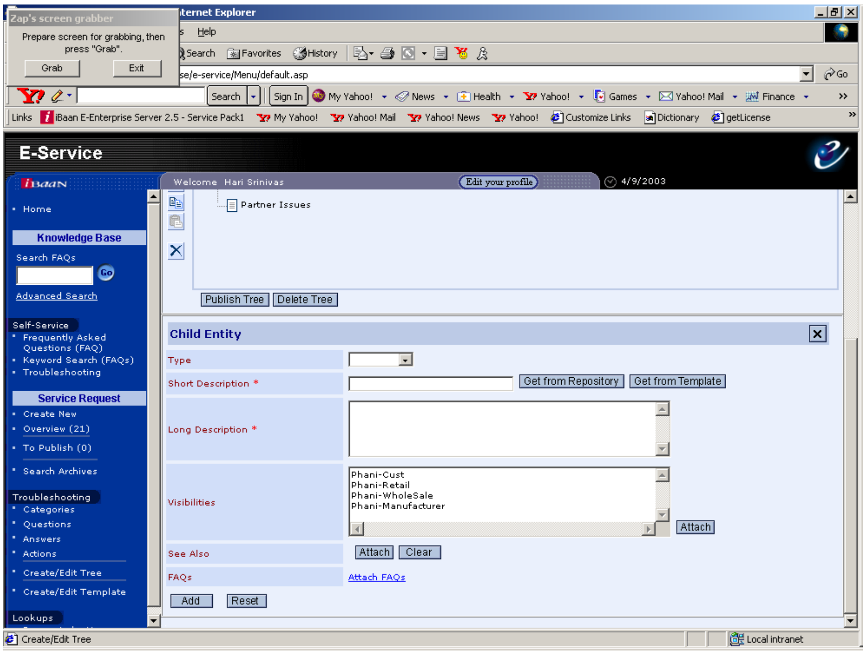

Figure 5-71 Create/ Edit Tree page, Child Entity pane

- Use the options available in this pane to add new nodes to the troubleshooting tree.
- Select the type of node you must attach to the tree. You can attach only a troubleshooting category as the first level of the tree. To a troubleshooting category you can attach a question, answer or action and create a tree.
- You can enter the short description and long description, or you can use the **Get From Repository** and **Get from Template** options.
- If you use the **Get from Repository** option, you can view a list of all the troubleshooting categories, questions, answers, or actions that are available in the repository on a new page. You must select the required node and add the node to the tree. For example, if you select Question as the type of node and use the **Get from Repository** option, you can view all the questions that are available in the database. Similarly, if you select a Troubleshooting Category, Answer, or Action as the type of node, you can view the related page, which displays a list of troubleshooting categories, answers or actions, respectively. You can select one of the nodes and add them to the tree.

- If you use the **Get from Template** option, you can view a list of all the templates that are related to the specific type of node you have selected. You can select the required node and add the node to the tree.
- After you select a node from the repository or the template, you can no longer make any modification to the short description and long description. In that case, you must use the **Reset** option to clear the nodes you have selected and either reselect a node or enter the content in the **Short Description** and **Long Description** fields.
- You can view the visibilities that are attached to the node you have selected. You can use the **Attach** option to add or remove the visibilities.
- You can use **Attach** option available in the **See Also** field to add a link to another node in the troubleshooting tree. After you attach the link, you can use the **Clear** option to remove the link and enter another link.
- You can use the **Attach FAQs** option in the **FAQs** field to add a Frequently Asked Question as a link to a node in the troubleshooting tree.
- Click **Add** to add the new node to the troubleshooting tree.

If you select a node in the troubleshooting tree, based on the node you have selected, you can view one of the related panes, which include the following:

- Troubleshooting Category pane
- Question pane
- Answer pane
- Action pane

Based on the node you have selected, you can view one of these panes as the third pane in the Create/Edit Tree page.

For example, in the following figure, you can view the Troubleshooting Category pane:

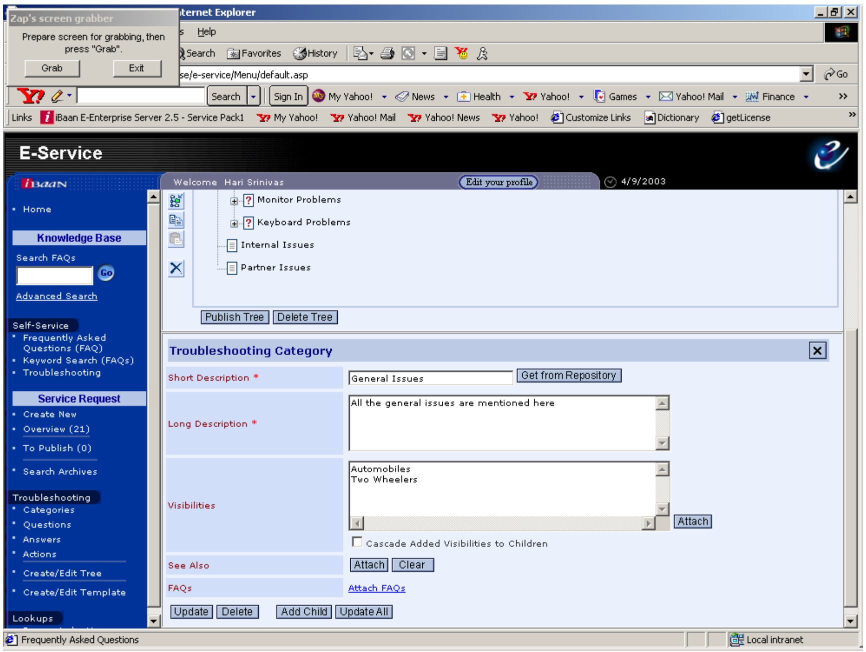

Figure 5-72 Troubleshooting Category pane

The Troubleshooting Category, Question, Answer, and Action panes contain the following fields and options:

- You can view the short and long description of the node in this pane. For example, if you select a troubleshooting category, you can view the short and long description of the troubleshooting category, and so on.
- You can use the **Get from Repository** option replace the node with another node from the database.
- You can view the **Visibilities** attached to the node. You can use the **Attach** option to add or remove the visibilities.
- The changes you make to the visibilities are applicable only for the specific node.
- If you have added new visibilities, you can select the **Cascade Added Visibilities to Children** check box to attach the new visibilities you have added for a specific node to all the child nodes.

- Use the **Attach** option in the **See Also** field to add a link to another node in the troubleshooting tree. You can use the **Clear** option in the **See Also** field to clear the existing links.
- Use the options available in the **FAQs** field to add a link to the Frequently Asked Questions to the specific node.
- Click **Update** to save the changes you have made to the node. Changes are node-specific.
- Click **Delete** to remove the node.
- Click **Add Child** to add a child entity to the node.
- Click **Update All** to modify the node wherever the node is used. The node can be used in as another node in the same troubleshooting tree, or in another troubleshooting tree or template. Irrespective of where the node is used, the content of the node is modified if you use this option. Even if another user is modifying the template or tree, the content of the node is updated. The user must exercise great caution while using this option.

Search troubleshooting tree

Use the search option available in the Troubleshooting pane of the Create/Edit tree page to locate the required node in the tree. You can use the operators such as **And**, **Or,** and **Exact phrase** to search on the basis of the keywords you have entered. Use **And** to search for all the nodes that have all the keywords you have entered. Use **Or** to search for all the nodes that have at least one of the keywords and use **Exact phrase** to search for the string as specified in the **Keywords** field.

Expand/collapse tree

Use the **Expand** (+) and **Collapse** (-) options available in the Troubleshooting pane of the Create/Edit tree page to either view the entire tree or to shrink the tree to a single level to hide all the nodes in the tree except the root node, respectively.

Print tree

Use the **Print** option available in the Troubleshooting pane of the Create/Edit tree page to print the troubleshooting tree.

Click the **Print** icon () to access the Select Print Options page, as shown in the following figure:

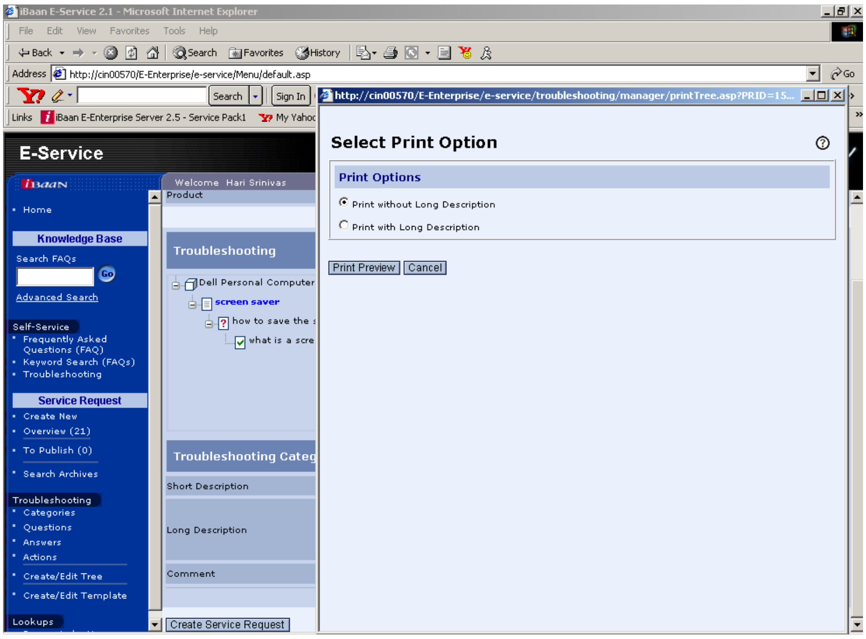

Figure 5-73 Select Print Option page

The Select Print Options page contains the following options:

- Print Without Long Description
- Print With Long Descriptions

Use the **Print Without Long descriptions** option to print the various nodes of the troubleshooting tree.

Use the **Print With Long Descriptions** option to print the tree in expanded format.

Click **Print Preview** to view the content in print format.

If you use the **Print without Long Descriptions** option, the print preview displays the content in the following format:

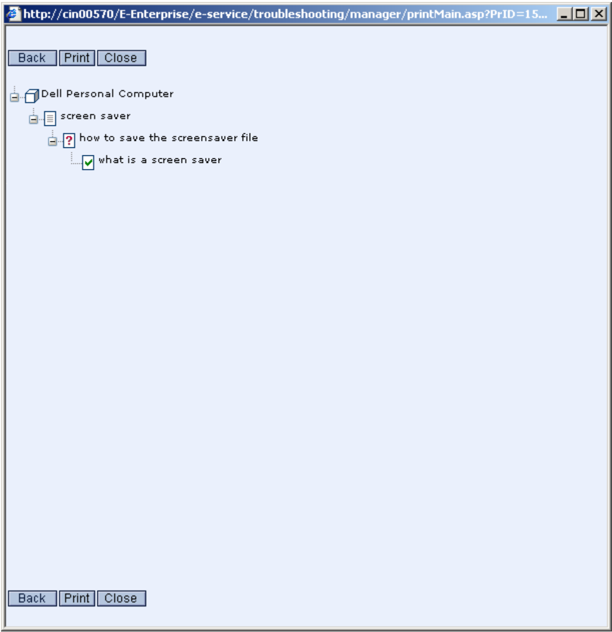

Figure 5-74 Example of Content with Print without Long Descriptions option

If you use the **Print With Long Descriptions** option, the print preview displays the content in the following format:

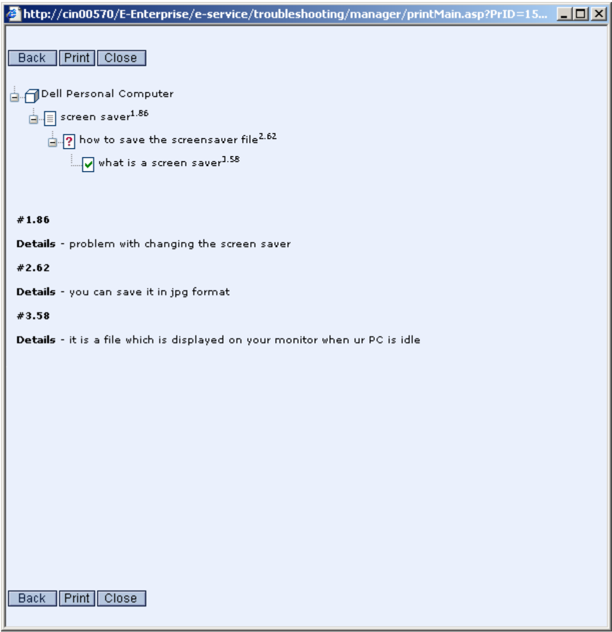

Figure 5-75 Example of Content with Print with Long Descriptions option

You can view the troubleshooting tree. A reference number is attached to each node in the tree.

The reference number is used to display the long description or detail attached to the node.

The Print Preview page contains the following options:

- **Back:**
  Use this option to go back to the Select Print Options page.
- **Print:**
  Use this option to print the troubleshooting tree in the selected format.
- **Close:**
  Use this option to go back to the Troubleshooting Tree page.

Delete tree

Use the **Delete** option available in the Troubleshooting pane of the Create/Edit tree page to delete the tree. You can delete the tree only if the following conditions are satisfied:

- The tree is not being modified by another user
- The user who is modifying the tree is also deleting the tree.

Create and publish troubleshooting template

This section describes the procedure the publisher must use to create and publish a troubleshooting template.

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

Use the **Create/Edit Template** link on the E-Service menu to access the Create/Edit Template page:

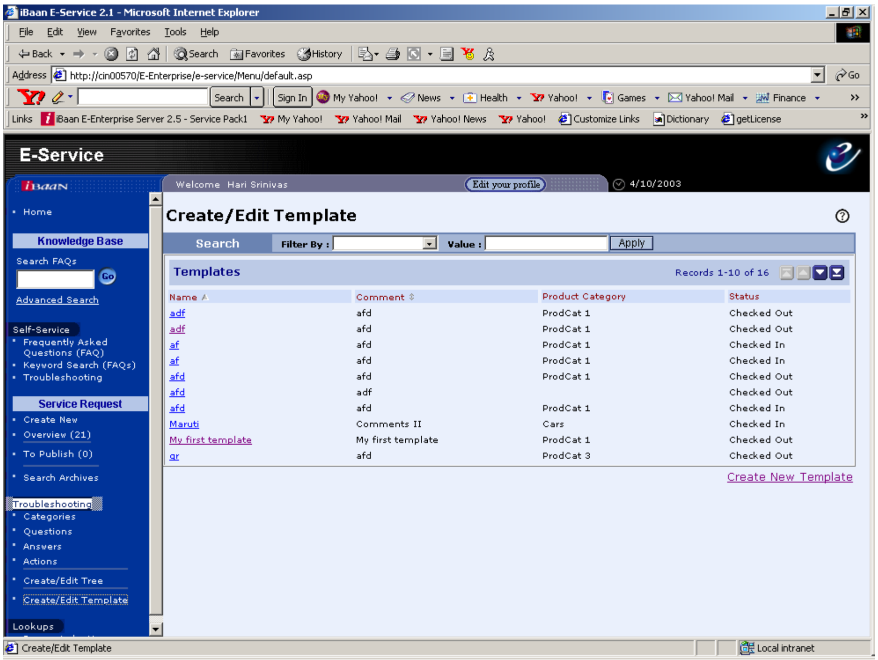

Figure 5-76 Create/Edit Tree page

You can view the following details related to a template on this page:

Fields	Description
Name	The name used to identify the template
Comment	The details related to the template.
Product Category	The product category to which the template belongs.
Status	The status of a template could be one of the following: ▪ **Checked Out**: if the status of the template is checked out, another user is editing the template. The user could also be the current user. ▪ **Checked In**: If the status of the template is Checked In, the template is published. A published template can be edited or modified by other users who can be classified as publishers and administrators.

Use the **Create New Template** link on this page to create a new template.

Create New Template

To access the Create New Template page, you can do the following:

1 Select the **Create/Edit Template** option on the E-Service menu to access the Create/Edit template page.

2 Click the **Create New Template** link on the Create/Edit page to access the Create New Template page:

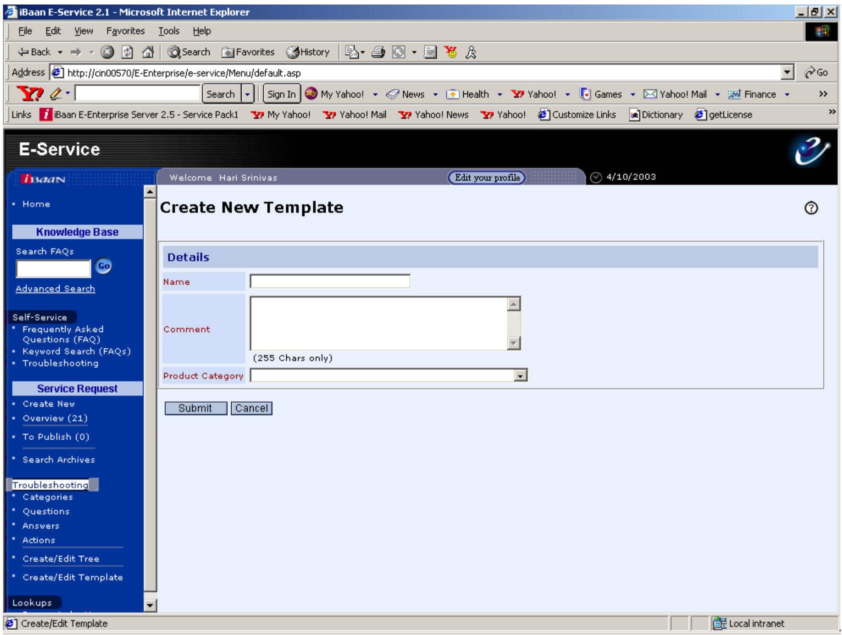

Figure 5-77 Create New Template page

Use this page to enter the following details related to a template:

- **Name:** Enter a name that is used to identify the template.
- **Comment:** Enter a comment that provides detailed explanation related to the template.
- **Product Category:** Select the product category to which the template belongs.
- Click **Submit** to access the Edit Template page. You must use this page to create a new template.
- Click **Cancel** to go back to the Create/Edit Template page.

Edit Template

To access the Edit Template page, you can enter the required details on the Create New Template page.

You can use the Edit Template page to browse, edit, and create a new template.

You can initially view the name, comment and product category you have entered on the Create New Template page in the Template Details pane.

If a template is already available for the product category, you can view the template structure in the Template pane:

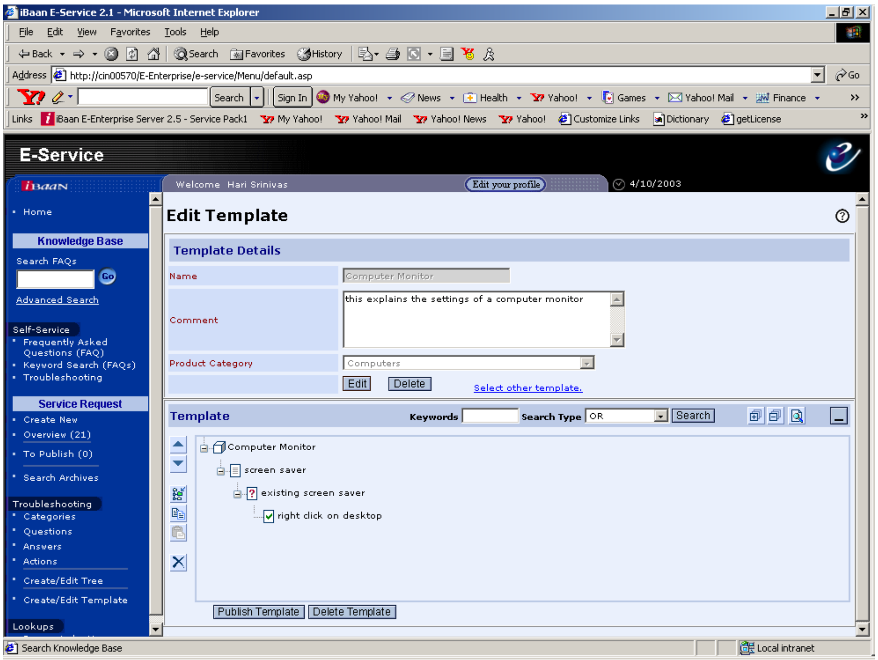

Figure 5-78 Edit Template page

If a troubleshooting tree is not available for the specific product category you selected in the Details pane of the Create New Template page, you can access the Edit Template page, which displays the following options in the Template pane:

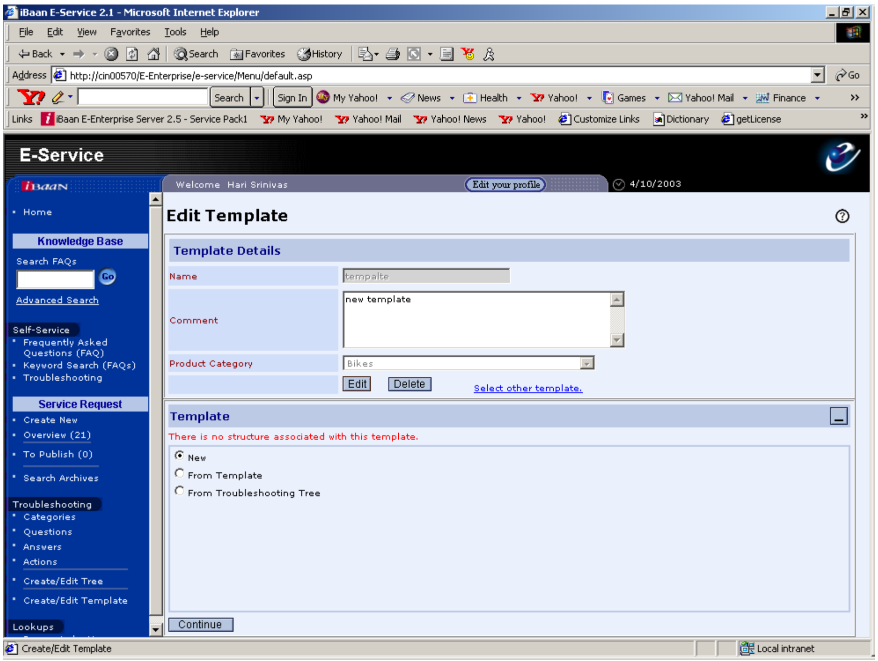

Figure 5-79 Edit Template page

Select the required check box to create a template.

- **New**:
  Use this option to create a new template. The user must create the template from scratch.
- **From Template**:
  Use this option to create the template from an existing template. The template provides the user with a basic structure. By using the **From Template** option, the user can copy and edit the basic structure to create a new template for the specific product category and product combination.
- **From another Tree**:
  Use this option to create the template from another troubleshooting tree. The user can copy and edit the basic structure to create a new template.

The following sections describe the procedure the user must use to create a new template by using either one of the options mentioned previously and to edit an existing template.

Create new template

This section describes the procedure the user must use to create a new template.

If a template is not available for a specific product category you have selected in the Details pane of the Create/Edit Template page and you selected the **New** option in the Template pane in the Edit Template page, you can create a new template:

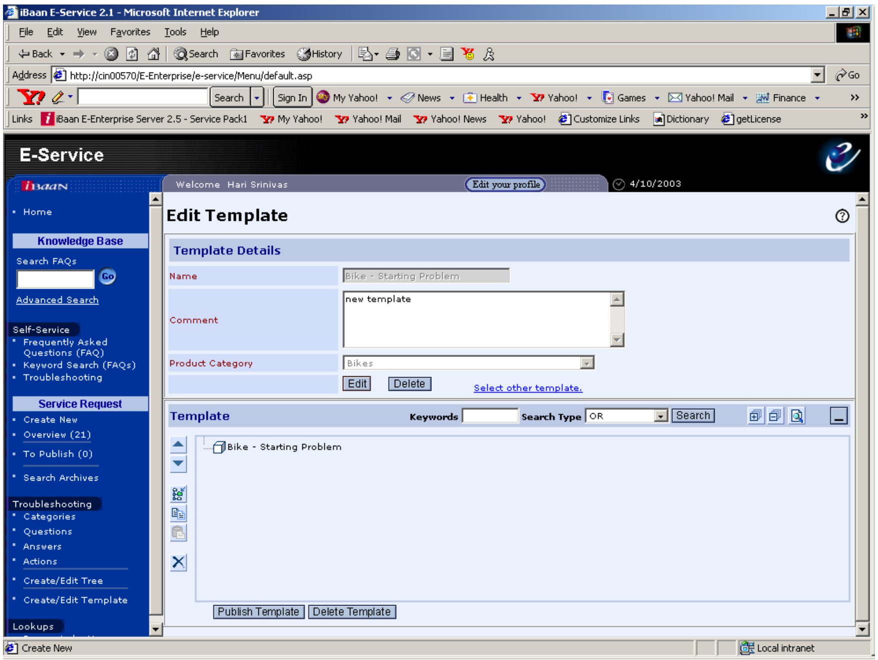

Figure 5-80 Edit Template page

The Template pane displays the name of the template you entered to create a template.

The Template pane contains the following icons.

Use these icons to do the following:

- Move the node up on the same level
- Move the node down on the same level
- Add a child entity
- Copy a node
- Paste a node. To enable this option, you must copy a node.
- Delete a node

You must use the **Child Entity** option to add the various nodes to the template.

You can now view the Child Entity pane, as shown in the following figure:

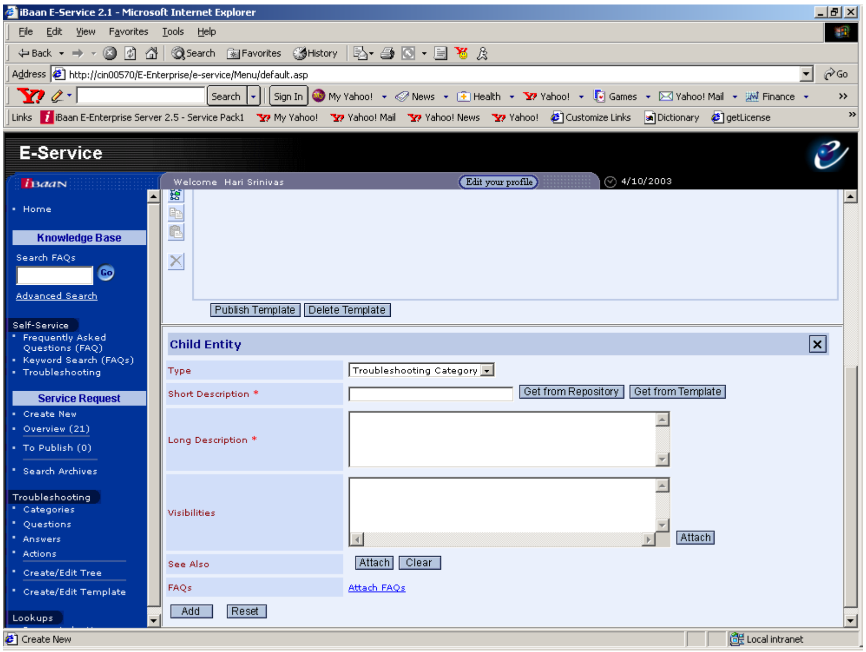

Figure 5-81 Child Entity pane - Create/ Edit Tree page

- Use the options available in this pane to add new nodes to the template.
- Select the type of node you must attach. You can attach a Troubleshooting Category, Question, Answer, or Action as the possible nodes.
- You can either enter the **Short Description** and **Long Description** or you can use the **Get From Repository** and **Get from Template** options.
- If you use the **Get from Repository** option, you can view a list of all the troubleshooting categories, questions, answers, or actions that are available in the repository. You can select the required node and add the node to the template. For example, if you select Question as the type of node and use the **Get from Repository** option, you can view all the questions that are available in the database and so on.
- If you use the **Get from Template** option, you can view a list of all the templates that are related to the specific type of node you have selected. You can select the required node and add the node to the template.

- After you select a node from the repository or the template, you cannot make any modification to the short description and long description. In that case, you must use the **Reset** option to clear the nodes you have selected and either reselect a node or enter the content in the **Short Description** and **Long Description** fields.
- Use the **Attach** option in the **Visibilities** field to add or remove the visibilities.
- Use the **Attach** option available in the **See Also** field to add a link to another node in the troubleshooting tree. After you attach a node, you can use the **Clear** option to remove the link and to enter another link.
- You can use the **Attach FAQs** option in the **FAQs** field to add a Frequently Asked Question as a link to a node in the troubleshooting tree.
- Click the **Add** option to add the new node to the template.

If you select a node in the template, based on the node you have selected, you can view one of the related panes, which include the following:

- Troubleshooting Category pane
- Question pane
- Answer pane
- Action pane

Based on the node you have selected, you can view one of these panes as the third pane on the Edit Template page.

For example, in the following figure, you can view the Question pane:

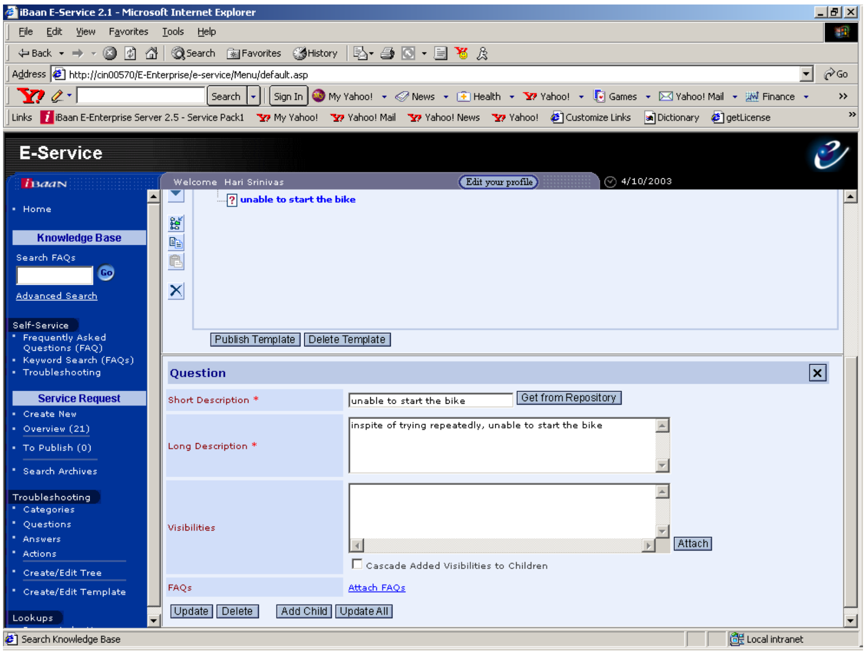

Figure 5-82 Question pane

The Troubleshooting Category, Question, Answer, and Action panes contain the following fields and options:

- You can view the short and long description of the node in this pane. For example, if you select a troubleshooting category, you can view the short and long description of the troubleshooting category, and so on.
- You can use the **Get from Repository** option replace the node with another node from the database.
- You can view the **Visibilities** attached to the node. You can use the **Attach** option to add or remove the visibilities.
- The changes you make to the visibilities are applicable only for the specific node.
- If you have added new visibilities, you can select the **Cascade Added Visibilities to Children** check box to attach the new visibilities you have added for a specific node to all the child nodes.

- Use the **Attach** option in the **See Also** field to add a link to another node in the troubleshooting tree. You can use the **Clear** option in the **See Also** field to clear the existing links.
- Use the options available in the **FAQs** field to add a link to the Frequently Asked Questions to the specific node.
- Click **Update** to save the changes you have made to the node. Changes are specific to the node.
- Click **Delete** to remove the node.
- Click **Add Child** to add a child entity to the node.
- Click **Update All** to modify the node wherever the node is used. The node can be used in as another node in the same troubleshooting tree, or in another troubleshooting tree or template. Irrespective of where the node is used, the content of the node is modified if you use this option. Even if another user is modifying the template or tree, the content of the node is updated. The user must exercise great caution while using this option.

Create template from another tree

This section describes the procedure you must use to create a template from a troubleshooting tree.

After you enter the required details on the Create New Template page, if a troubleshooting tree is not available for the specific product category you have specified, you can access the Edit Template page. This page displays the various options you can use to create a new troubleshooting tree in the Template pane.

If you select the **From Troubleshooting Tree** option, you can access a new page. Select the product category on this page to view a list of all the existing troubleshooting trees, as shown in the following figure:

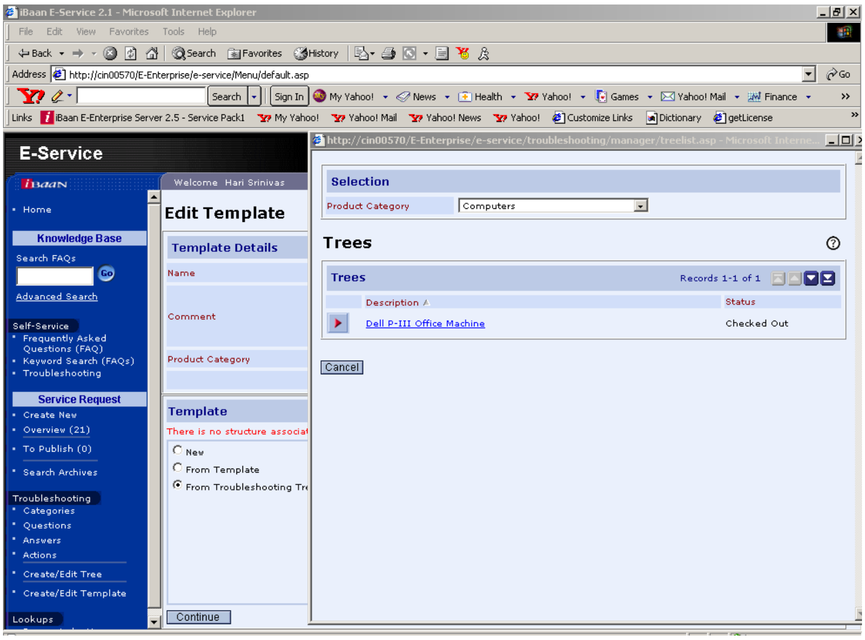

Figure 5-83 Edit template page, Trees pane

On the new page, you must select the product category to view the troubleshooting trees related to the specific product category.

Select an existing troubleshooting tree and customize the tree to create a template for the specific product category.

The troubleshooting tree you have selected appears in the Template pane of the Edit Template page:

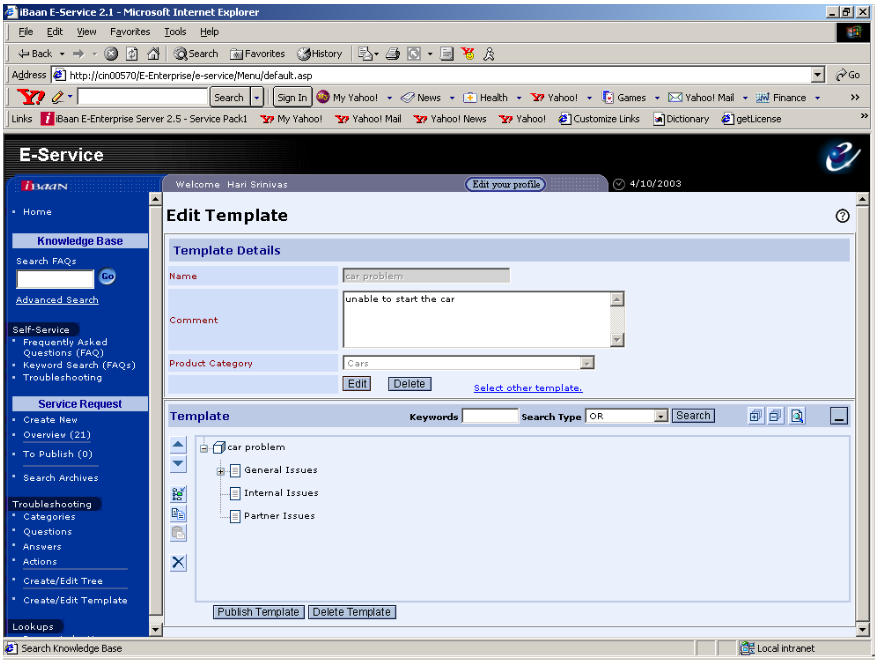

Figure 5-84 Edit Template

The Template pane displays the tree you have selected, which you can customize to create a template for the specific product category.

The Template pane contains the following icons:

Use these icons to do the following:

- Move the node up on the same level.
- Move the node down on the same level.
- Add a child entity.
- Copy a node.
- Paste a node. To enable this option, you must copy a node.
- Delete a node

You must use the **Child Entity** icon to add the various nodes to the template.

You can now view the Child Entity pane, as shown in the following figure:

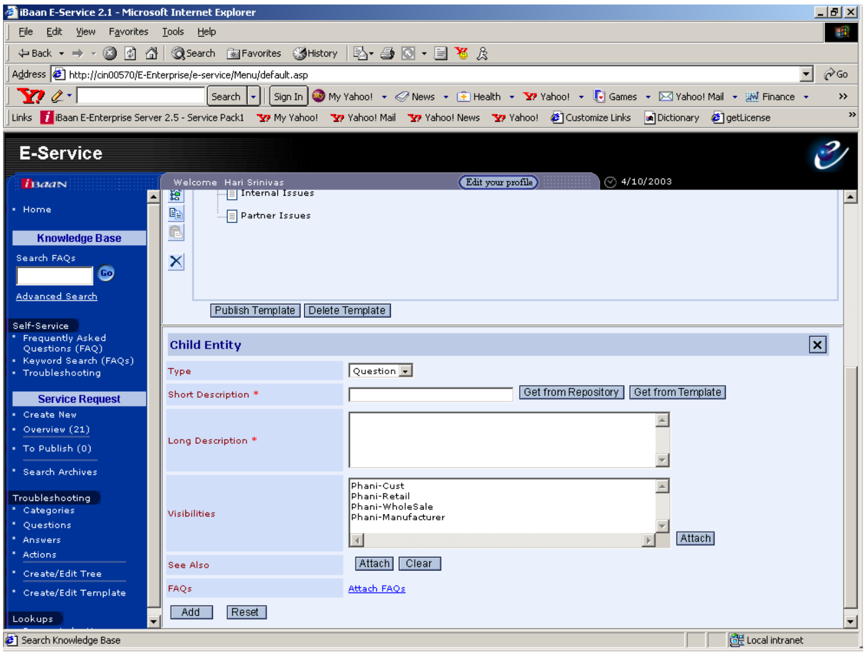

Figure 5-85 Edit Template page, Child Entity pane

Use the options available in this pane to add new nodes to the template.

Select the type of node you must attach. You can attach a Troubleshooting Category, Question, Answer, or Action as the possible nodes.

You can either enter the short description and long description, or you can use the **Get From Repository** and **Get from Template** options.

If you use the **Get from Repository** option, you can view a list of all the troubleshooting categories, questions, answers, or actions that are available in the repository. You can select the required node and add the node to the template.

For example, if you select Question as the type of node and use the **Get from Repository** option, you can view all the questions that are available in the database and so on.

If you use the **Get from Template** option, you can view a list of all the templates that are related to the specific type of node you have selected. You can select the required node and add it to the template.

After you select a node from the repository or the template, you cannot make any modification to the short description and long description. In that case, you must use the **Reset** option to clear the nodes you have selected and either reselect a node or enter the content in the **Short Description** and **Long Description** fields.

Use the **Attach** option in the **Visibilities** field to add or remove the visibilities.

Use the **Attach** option available in the **See Also** field to add a link to another node in the troubleshooting tree. After you attach a link, you can use the **Clear** option to remove the link and to enter another link.

You can use the **Attach FAQs** option in the **FAQs** field to add a Frequently Asked Question as a link to a node in the troubleshooting tree.

Click **Add** option to add the new node to the template.

If you select a node in the template, based on the node you have selected, you can view one of the related panes, which include the following:

- Troubleshooting Category pane
- Question pane
- Answer pane
- Action pane

Based on the node you have selected, you can view one of these panes as the third pane in the Edit Template page.

For example, in the following figure, you can view the Questions pane:

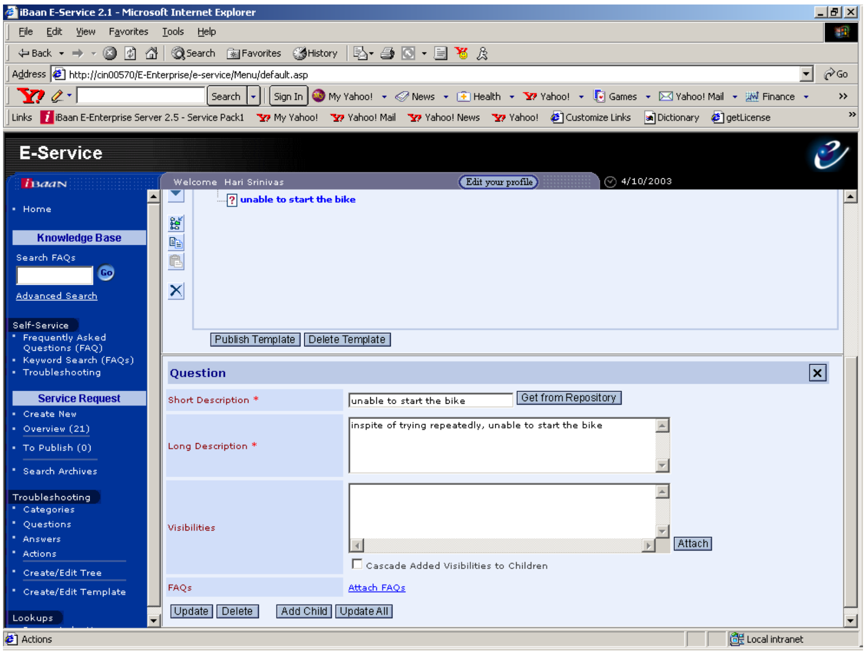

Figure 5-86 Questions pane

The Troubleshooting Category, Question, Answer, and Action panes contain the following fields and options:

You can view the short and long description of the node in this pane. For example, if you select a troubleshooting category, you can view the short and long description of the troubleshooting category and so on.

You can use the **Get from Repository** option replace the node with another node from the database.

You can view the **Visibilities** attached to the node. You can use the **Attach** option to add or remove the visibilities.

The changes you make to the visibilities are applicable only for the specific node.

If you have added new visibilities, you can select the **Cascade Added Visibilities to Children** check box to attach the new visibilities you have added for a specific node to all the child nodes.

Use the **Attach** option in the **See Also** field to add a link to another node in the troubleshooting tree. You can use the **Clear** option in the **See Also** field to clear the existing links.

Use the options available in the **FAQs** field to add a link to the Frequently Asked Questions to the specific node.

Click **Update** to save the changes you have made to the node. Changes are specific to the node.

Click **Delete** to remove the node.

Click **Add Child** to add a child entity to the node.

Click **Update All** to modify the node wherever the node is used. The node could be used in as another node in the same troubleshooting tree, or in another troubleshooting tree or template. Irrespective of where the node is used, the content of the node is modified if you use this option. Even if another user is modifying the template or tree, the content of the node is updated. The user must exercise great caution while using this option.

Create template from another template

This section describes the procedure you must use to create a template from another template.

After you select a product category and product on the Create/Edit Tree page, and a troubleshooting tree is not available for the specific combination, you can specify the procedure you must use to create a new tree.

If you select the **From Template** option, you can access a page that displays a list of all the relevant templates, as shown in the following figure:

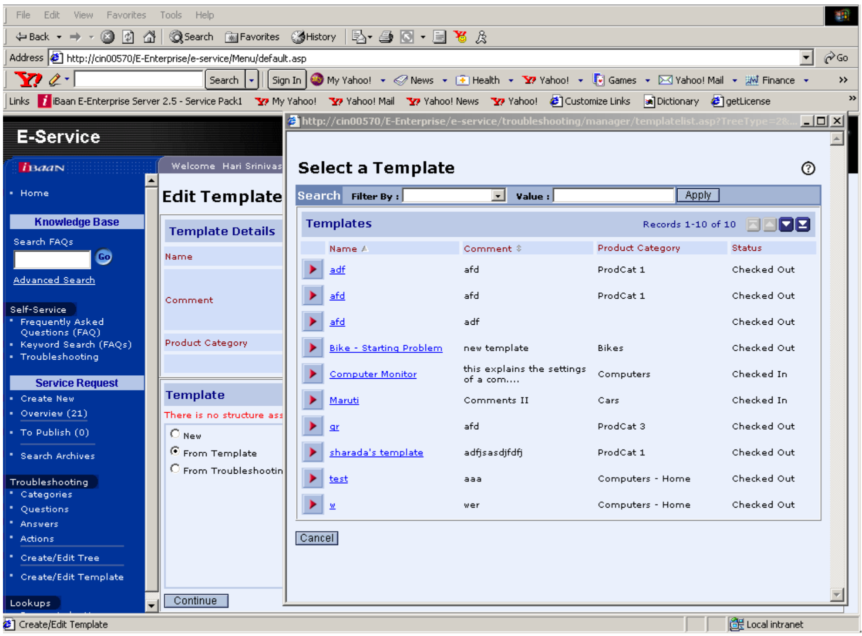

Figure 5-87 Edit Template page, Select a Template page

Select and customize an existing template to create a template for the specific product category.

The template you have selected appears in the Template pane of the Edit Template page:

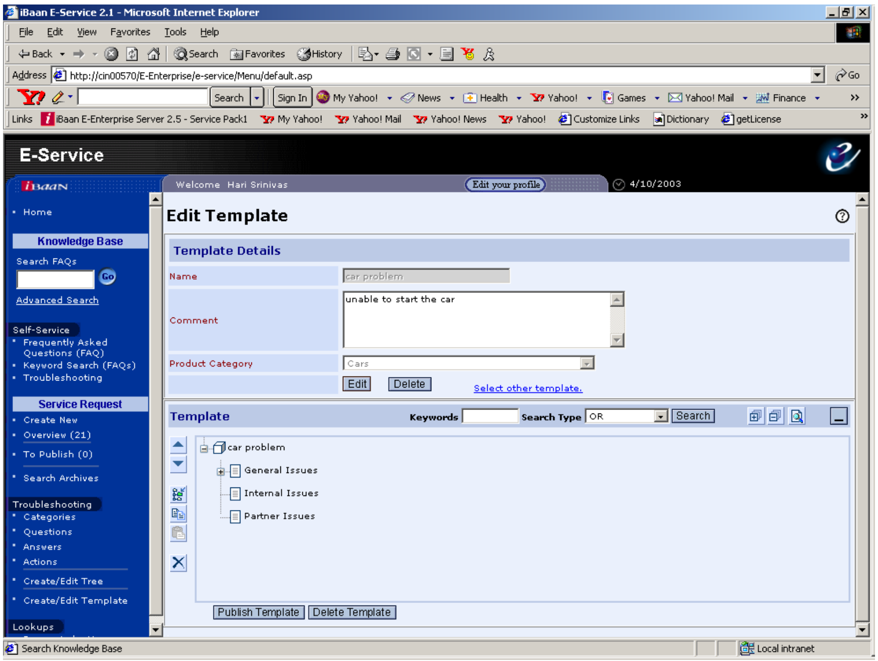

Figure 5-88 Edit Template page

The Template pane displays the tree you selected, which you can customize to create a template for the specific product category.

The Template pane contains the following icons:

You can use these icons to do the following:

- Move the node up on the same level.
- Move the node down on the same level.
- Add a child entity.
- Copy a node.
- Paste a node. To enable this option, you must copy a node.
- Delete a node

You must use the **Child Entity** icon to add the various nodes to the template.

You can now view the Child Entity pane, as shown in the following figure:

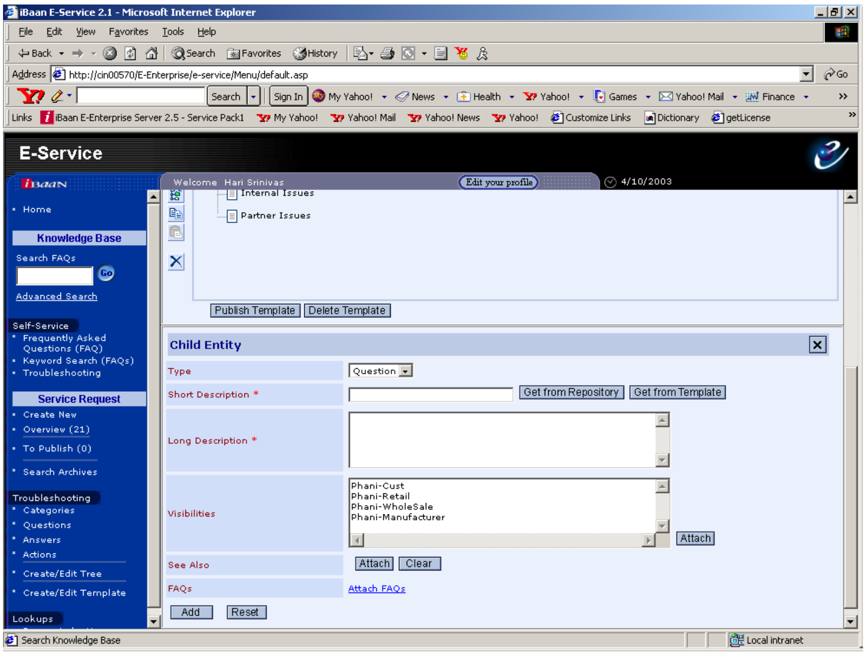

Figure 5-89 Edit Template page, Child Entity pane

- Use the options available in this pane to add new nodes to the template.
- Select the type of node you must attach. You can attach a troubleshooting category, question, answer, or action as the possible nodes.
- You can either enter the short description and long description or you can use the **Get From Repository** and **Get from Template** options.

- If you use the **Get from Repository** option, you can view a list of all the troubleshooting categories, questions, answers, or actions that are available in the repository. You can select the required node and add the node to the template. For example, if you select Question as the type of node and use the **Get from Repository** option, you can view all the questions that are available in the database and so on.
- If you use the **Get from Template** option, you can view a list of all the templates that are related to the specific type of node you have selected. You can select the required node and add it to the template.
- After you select a node from the repository or the template, you cannot make any modification to the short description and long description. In that case you must use the **Reset** option to clear the nodes you have selected and either reselect a node or enter the content in the **Short Description** and **Long Description** fields.
- Use the **Attach** option in the **Visibilities** field to add or remove the visibilities.
- Use the **Attach** option available in the **See Also** field to add a link to another node in the troubleshooting tree. After you attach the link, you can use the **Clear** option to remove the link and to enter another link.
- You can use the **Attach FAQs** option in the **FAQs** field to add a Frequently Asked Question as a link to a node in the troubleshooting tree.
- Click **Add** option to add the new node to the template.

If you select a node in the template, then, based on the node you have selected, you can view one of the related panes, which include the following:

- Troubleshooting Category pane
- Question pane
- Answer pane
- Action pane

Based on the node you have selected, you can view one of these panes as the third pane in the Edit Template page.

For example, in the following figure, you can view the Questions pane:

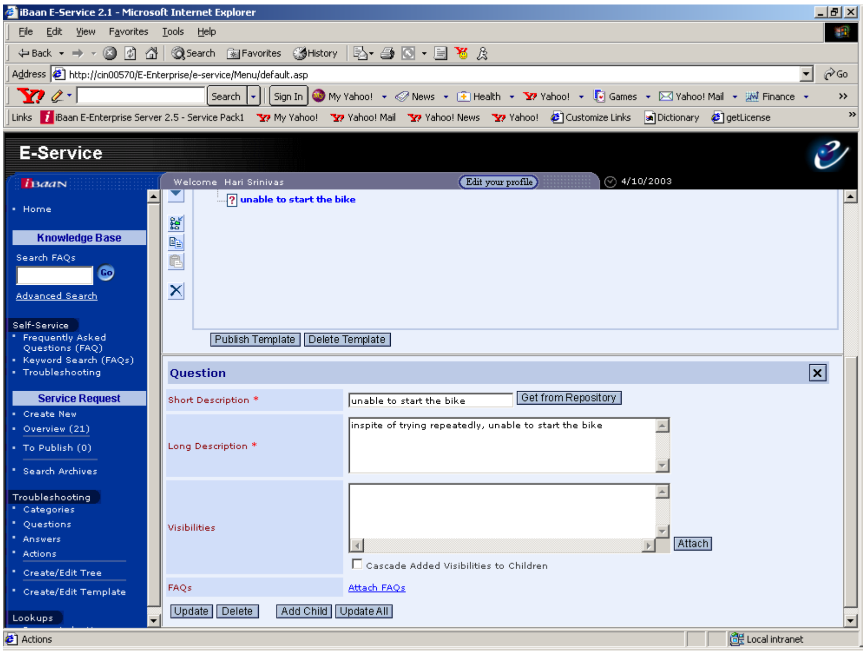

Figure 5-90 Question pane

The Troubleshooting Category, Question, Answer, and Action panes contain the following fields and options:

- You can view the **Short and Long description** of the node in this pane. For example, if you select a troubleshooting category, you can view the short and long description of the troubleshooting category, and so on.
- You can use the **Get from Repository** option replace the node with another node from the database.
- You can view the **Visibilities** attached to the node. You can use the **Attach** option to add or remove the visibilities.
- The changes you make to the visibilities are applicable only for the specific node.
- If you have added new visibilities, you can select the **Cascade Added Visibilities to Children** check box to attach the new visibilities you have added for a specific node to all the child nodes.

- Use the **Attach** option in the **See Also** field to add a link to another node in the troubleshooting tree. You can use the **Clear** option in the **See Also** field to clear the existing links.
- Use the options available in the **FAQs** field to add a link to the Frequently Asked Questions to the specific node.
- Click **Update** to save the changes you have made to the node. Changes are specific to the node.
- Click **Delete** to remove the node.
- Click **Add Child** to add a child entity to the node.
- Click **Update All** to modify the node wherever the node is used. The node could be used in as another node in the same troubleshooting tree, or in another troubleshooting tree or template. Irrespective of where the node is used, the content of the node is modified if you use this option. Even if another user is modifying the template or tree, the content of the node is updated. The user must exercise great caution while using this option.

Edit template

Click the **Create/Edit Template** link in the Navigation pane to access the Create/Edit Template page.

This page provides a list of all the templates available in the database.

Use the hyperlink available for the **Name** of the template to access the Edit Template page.

This page displays the template.

In this case, you can use the options available in the Template pane to edit the template.

Use the **Edit Template** option to make the required modifications.

At any point in time, only one user can edit the content of the template.

After editing, the user must use the **Publish Template** option to make the content available to other users who can be classified as registered users, guest users, publisher, and administrator.

NOTE While you create a template, you do not have to use the **Edit template** option. Editing is automatically enabled until the template is published. After publishing, the user must use the **Edit Template** option to make additional changes.

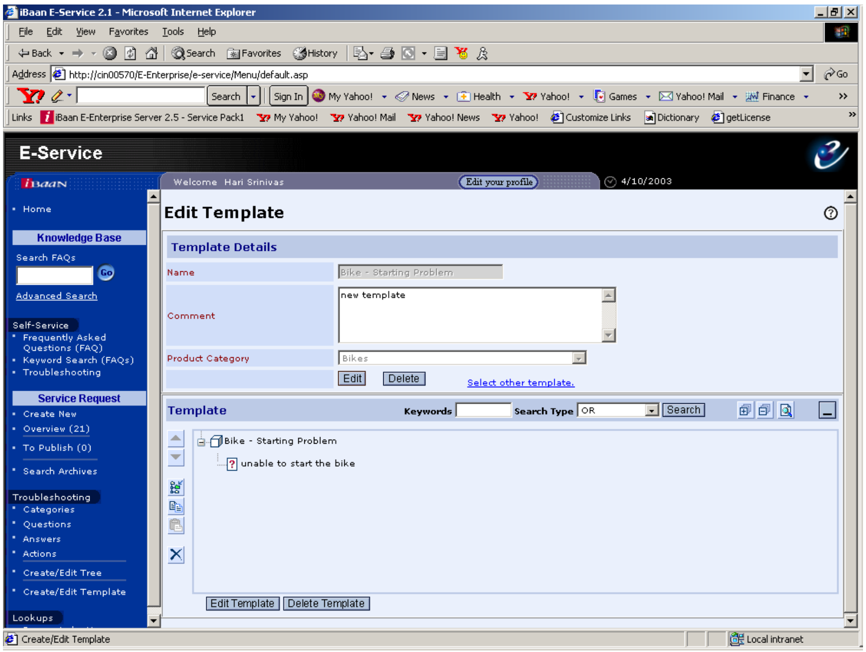

Figure 5-91 Edit Template page

To edit the template, the user can use the options available in the Template pane to do the following:

- Add node
- Delete node
- Modify node
- Copy and paste the nodes
- Re-order node

The Template pane contains the following icons:

You can use these icons to do the following:

- Move the node up on the same level.
- Move the node down on the same level.
- Add a child entity.
- Copy a node.
- Paste a node. To enable this option, you must copy a node.
- Delete a node

You must use the **Add Child Entity** icon to add the various nodes to the troubleshooting tree.

You can now view the Child Entity pane, as shown in the following figure:

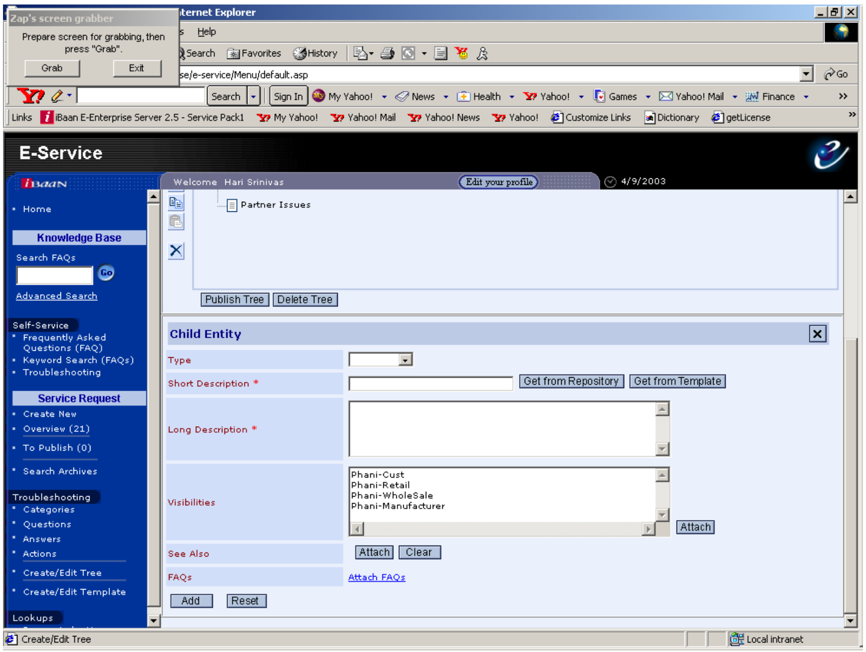

Figure 5-92 Create/Edit Tree page, Child Entity pane

- Use the options available in this pane to add new nodes to the template.
- Select the type of node you must attach. You can attach a Troubleshooting Category, Question, Answer, or Action as the possible nodes.
- You can either enter the short description and long description or you can use the **Get From Repository** and **Get from Template** options.

- If you use the **Get from Repository** option, you can view a list of all the troubleshooting categories, questions, answers, or actions that are available in the repository. You can select the required node and add it to the template. For example, if you select Question as the Type of node and use the **Get from Repository** option, you can view all the questions that are available in the database and so on.
- If you use the **Get from Template** option, you can view a list of all the templates that are related to the specific type of node you have selected. You can select the required node and add it to the template.
- After you select a node from the repository or the template, you cannot make any modification to the short description and long description. In that case, you must use the **Reset** option to clear the nodes you have selected and either reselect a node or enter the content in the **Short Description** and **Long Description** fields.
- Use the **Attach** option in the **Visibilities** field to add or remove the visibilities.
- Use the **Attach** option available in the **See Also** field to add a link to another node in the troubleshooting tree. After you attach a link, you can use the **Clear** option to remove the link and to enter another link.
- You can use the **Attach FAQs** option in the **FAQs** field to add a Frequently Asked Question as a link to a node in the troubleshooting tree.
- Click **Add** option to add the new node to the template.

If you select a node in the template, then, based on the node you have selected, you can view one of the related panes, which include the following:

- Troubleshooting Category pane
- Question pane
- Answer pane
- Action pane

Based on the node you have selected, you can view one of these panes as the third pane on the Edit Template page.

For example, in the following figure, you can view the Questions pane:

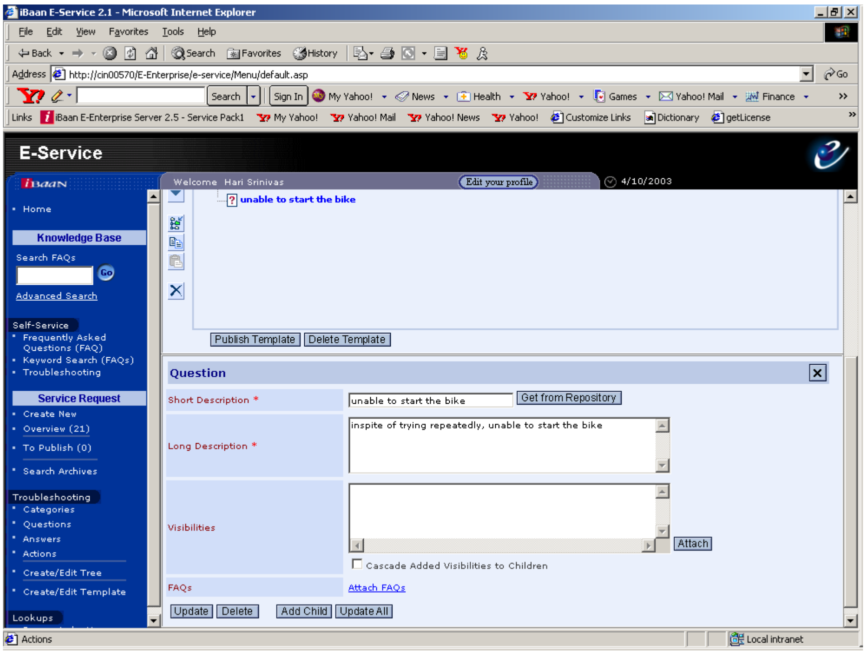

Figure 5-93 Question pane

The Troubleshooting Category, Question, Answer, and Action panes contains the following fields and options:

- You can view the short and long description of the node in this pane. For example, if you select a troubleshooting category, you can view the short and long description of the troubleshooting category, and so on.
- You can use the **Get from Repository** option to replace the node with another node from the database.
- You can view the **Visibilities** attached to the node. You can use the **Attach** option to add or remove the visibilities.
- The changes you make to the visibilities are applicable only for the specific node.
- If you have added new visibilities, you can select the **Cascade Added Visibilities to Children** check box to attach the new visibilities you have added for a specific node to all the child nodes.

- Use the **Attach** option in the **See Also** field to add a link to another node in the troubleshooting tree. You can use the **Clear** option in the **See Also** field to clear the existing links.
- Use the options available in the **FAQs** field to add a link to the Frequently Asked Questions to the specific node.
- Click **Update** to save the changes you have made to the node. Changes are node-specific.
- Click **Delete** to remove the node.
- Click **Add Child** to add a child entity to the node.
- Click **Update All** to modify the node wherever the node is used. The node could be used in as another node in the same troubleshooting tree, or in another troubleshooting tree or template. Irrespective of where the node is used, the content of the node is modified if you use this option. Even if another user is modifying the template or tree, the content of the node is updated. The user must exercise great caution while using this option.

Search template

Use the search option available in the Template pane of the Edit Template page to locate the required node in the template. You can use the operators such as **And**, **Or,** and **Exact phrase** to search on the basis of the keywords you have entered. Use **And** to search for all the nodes that have all the keywords you have entered. Use **Or** to search for all the nodes that have at least one of the keywords and use **Exact phrase** to search for the string as specified in the **Keywords** field.

Expand/collapse Template

Use the **Expand** (+) and **Collapse** (-) options available in the Template pane of the Edit Template page to either view the entire template or to shrink the entire template to a single level hiding all the nodes in the template except the root node, respectively.

Print template

Use the **Print** option available in the Template pane of the Edit Template page to print the template.

Click the **Print** icon () to access the Select Print Options page, as shown in the following figure:

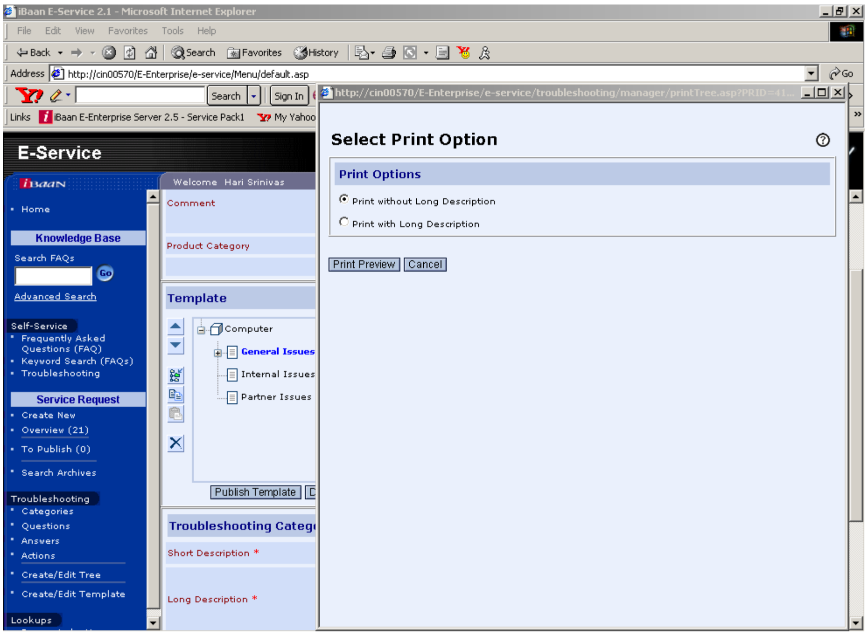

Figure 5-94 Select Print Option page

The Select Print Options page contains the following options:

- Print Without Long Description
- Print With Long Descriptions

Use the **Print Without Long descriptions** option to print the various nodes of the troubleshooting tree.

Use the **Print With Long Descriptions** option to print the tree in expanded format.

Click **Print Preview** to view the content as the content would appear in printed format.

If you use the **Print without Long Descriptions** option, the print preview displays the content in the following format:

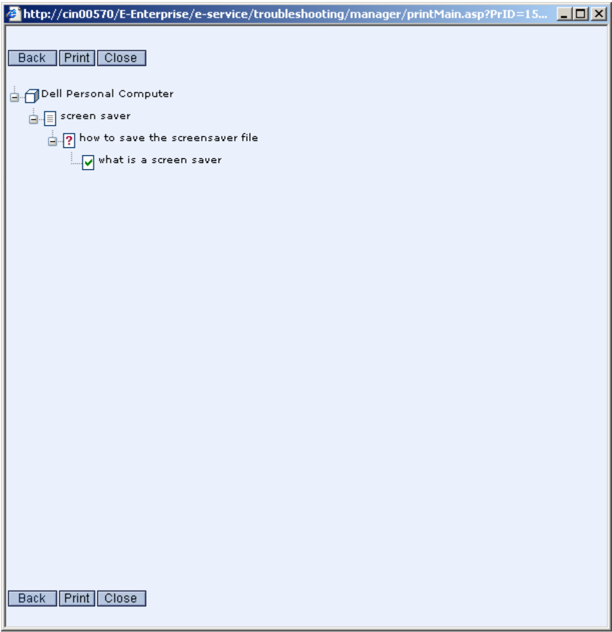

Figure 5-95 Sample content using Print without Long Descriptions option

If you use **the Print With Long Descriptions** option, the print preview displays the content in the following format:

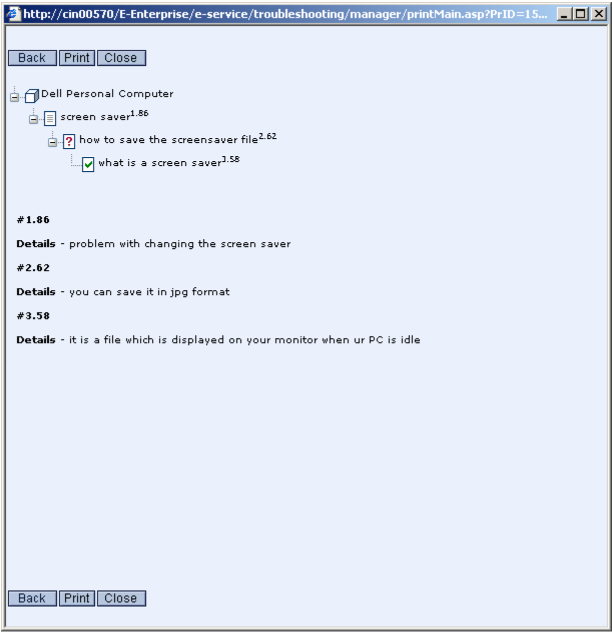

Figure 5-96 Sample content with the Print with Long Description option

You can view the troubleshooting tree. A reference number is attached to each node in the tree.

The reference number is used to display the long description or detail attached to the node.

The Print Preview page contains the following options:

- **Back:**
  Use this option to go back to the Select Print Options page.
- **Print:**
  Use this option to print the troubleshooting tree in the selected format.
- **Close:**
  Use this option to go back to the Troubleshooting Tree page.

Delete template

Use the **Delete** option available in the Template pane of the Edit Template page to delete the template. You can delete the template only if the following conditions are satisfied:

- The template is not being modified by another user
- The user who is modifying the template is deleting the template.

6 E-Service integrated with Baan IV

This chapter describes the role of the internal users if the application is integrated with Baan IVc4.

If E-Service is integrated with Baan IVc4 in the back end, the call center engineer can transfer the service request to a field service engineer. A service order is created in the back end, which the field service engineer uses to make an onsite visit to the customer's site and solve the problem specified in the service request. For more details, refer to "Call center engineer," in Chapter 4, "E-Service stand-alone mode."

Service request process

This section describes the process flow of the service request when E-Service is integrated with Baan IVc4 in the back end.

- The registered user logs on to the application to create a service request.
- Enters the details required to create a service request and submits it.
- The service request is assigned to a call center engineer based on the dispatch rules applicable for the application.
- If automatic dispatching is enabled, the service request is automatically assigned to the call center engineer.
- If automatic dispatching is not enabled, the call center dispatcher must manually dispatch the service request to the call center engineer.
- The call center engineer can either answer the query specified in the service request or transfer the service request to the field service support when an onsite visit is required. The field service engineer goes to the customer site and solves the problem.
- A service order is created when a service request is transferred to the back end.
- The field service engineer, before going on an onsite visit, can ask the call center engineer for clarifications.
- The call center engineer must, in turn, seek the clarification from the user who created the service request.

- The status of the service request is FS Waiting – External.
- After the user clarifies, the status of the service request changes to Clarified.
- If the field service engineer is waiting for the clarification from an internal source, the status of the service request is FS Waiting – Internal.
- The call center engineer uses the **Synchronize** option to synchronize the service request's statuses with the back end service order statuses. This action sends a closed e-mail message to customers for all service requests for which linked service orders are completed in the back end. The statuses of the service requests also change to Accepted if the linked service order is completed in the back end.
- The call center engineer adds comment to the solved service request and sends the solved request to the publisher.
- The service request is in the publisher's queue. The status of the service request is To Be Published.
- The publisher edits the service request and publishes the request in the FAQs database. The status of the service request is Published.

Service order

A service order is created in the Maintain Service Orders (tssma3101m000) session when a service request is transferred to the back end.

This session is used to create and maintain a service order in Baan IV.

This session has three forms. The following figures illustrate the fields in all the three forms:

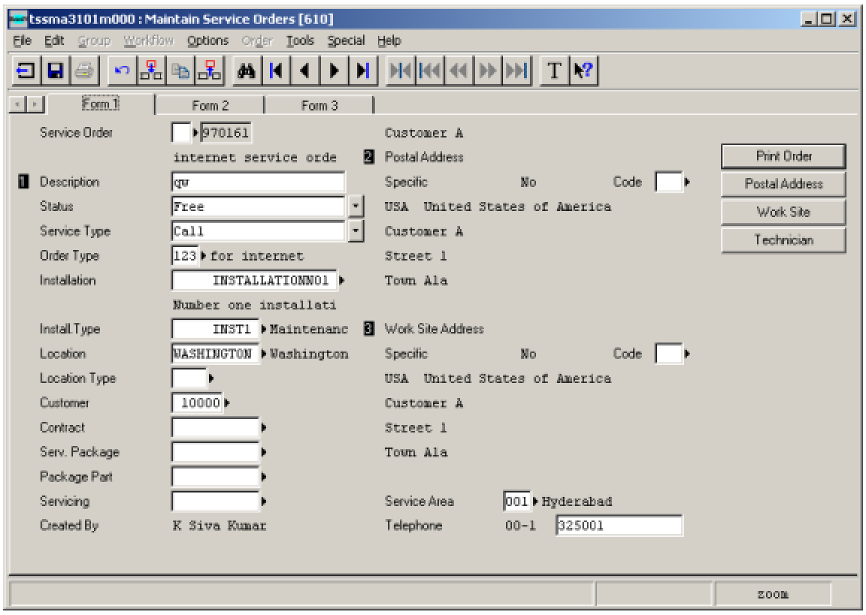

Figure 6-1 Maintain Service Orders (tssma3101m000), Form 1

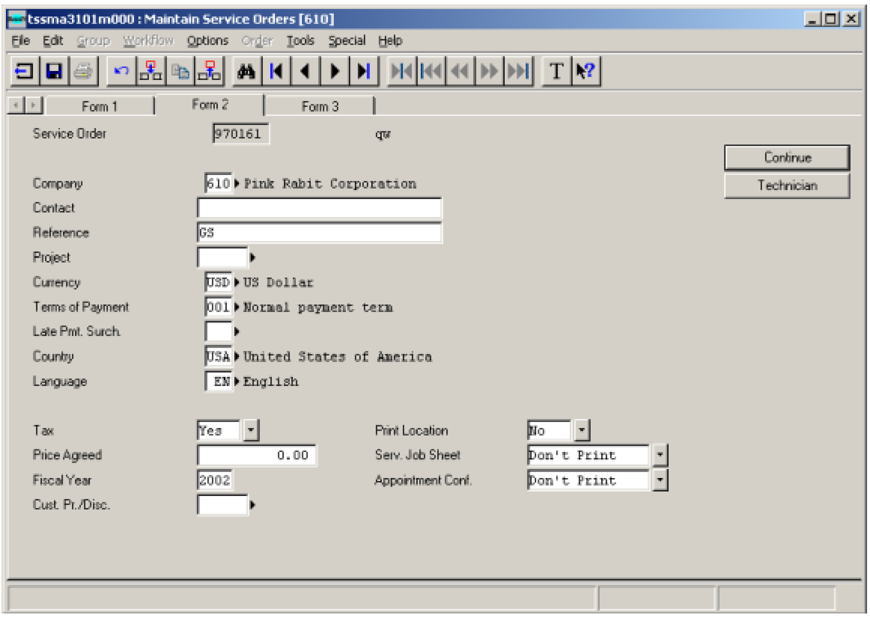

Figure 6-2 Maintain Service Orders (tssma3101m000) Form 2

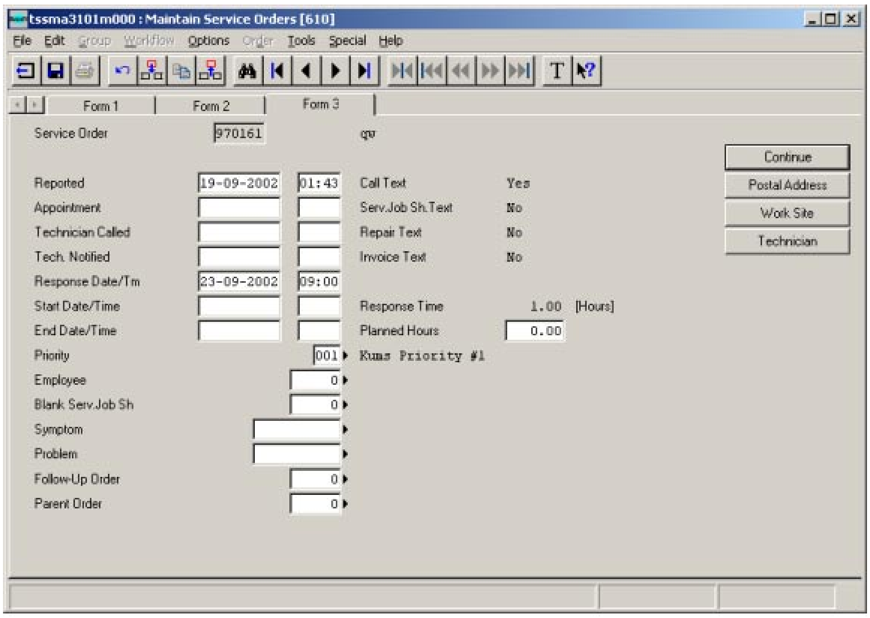

Figure 6-3 Maintain service Order (tssma3101m000), Form 3

The service order is not created in the Baan IVc4 for a blocked customer. As a result, if the service request for an onsite visit for a blocked customer is submitted, Baan IV cannot trigger a service order in the back end. Therefore, in E-service, this type of service request is shown as in Draft status. The idea is that, when the supervisor removes blocking for the customer, CCE can resubmit this draft service request for triggering a service order in the back end.

In some cases, a service order is created but is blocked or put on hold because the customer is blocked for the following reasons:

- Credit limit check
- Overdue invoices check.
- Doubtful accounts check.

If the service order is blocked, the field service engineer cannot take any action until the blocking is released.

Service request status

A service request that is transferred to the Baan IVc4 can have the following status:

Service Request Status in E-Service	
FS Transferred	
On Hold	
Draft	
FS Waiting – External	
Fs Waiting – Internal	
Clarified	
Completed	
Solved	
Closed	
Accepted	
Published	
Registered	
In Hand	

Service Order Status in E-Service	Service Order Status in Baan IV
Registered	Free
Tentatively scheduled	Planned
Scheduled	In progress
Completed	Completed
Costed	Costed
Closed	History
Cancelled	Cancelled

Unblock customer

To unblock the customer, the supervisor can use the **Unblock Customer** option on the E-Service menu:

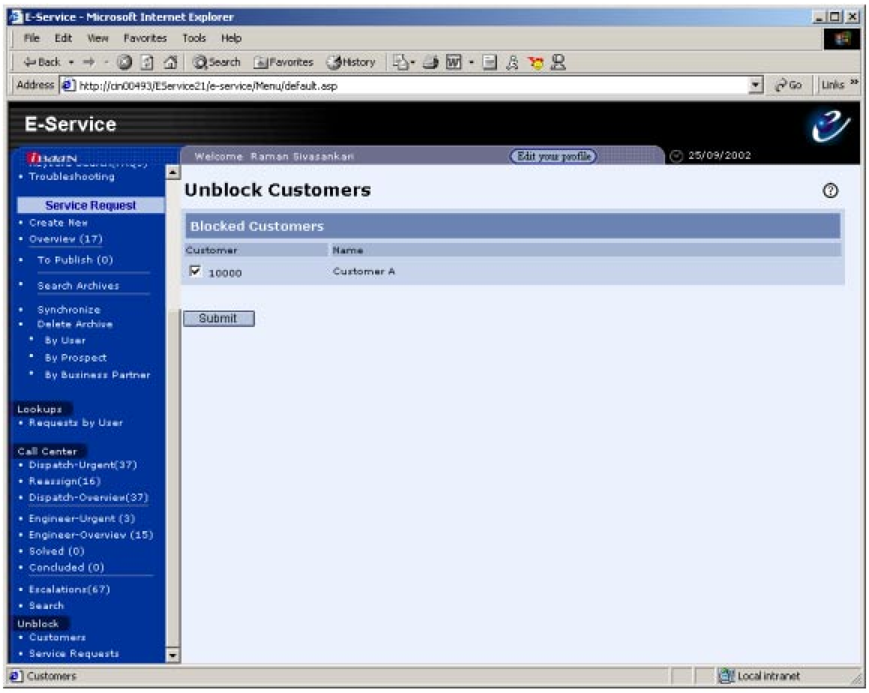

Figure 6-4 Unblock Customer page

The supervisor can view a list of all the blocked customers on this page.

The customer identification code and the customer name appear on this page.

The supervisor must select the check box that corresponds to the customer code and click **Submit** to access the Confirm Action page:

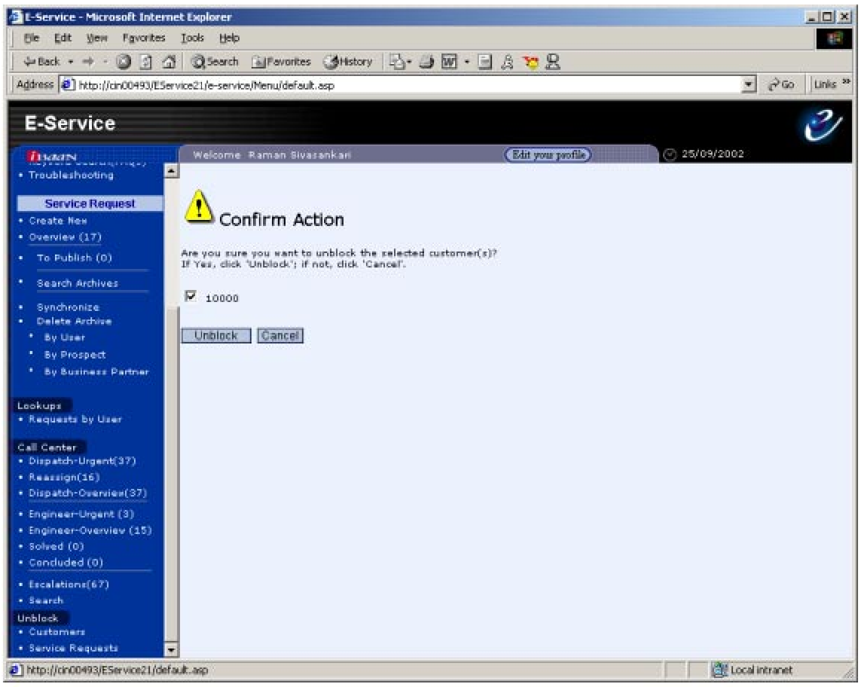

Figure 6-5 Confirm Action page

This page enables the supervisor to confirm the unblock action for a customer.

To unblock the customer, the supervisor must click **Unblock**.

Click **Cancel** to go to the Unblock Customer page.

Unblock service request

The supervisor can unblock the service requests by using the **Unblock Service Request** option on the E-Service menu.

The supervisor can access the Your Requests page:

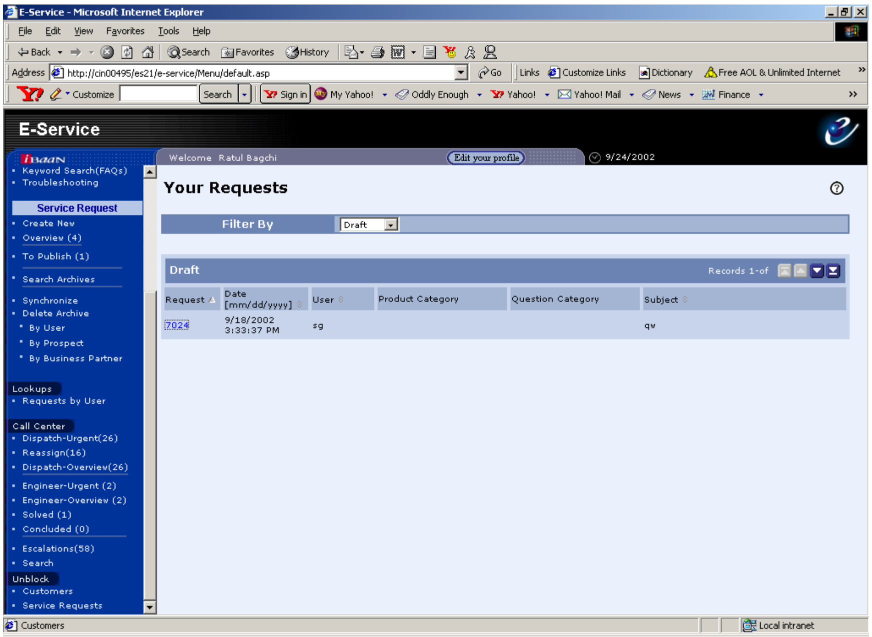

Figure 6-6 Your Requests page

View the following details related to the service request on the Your Requests page:

Fields	Description
Request	The service request number appears on this page.
Date	The date and time when the service request was registered.
User	The name of the user who created the service request appears here.
Product Category	The category to which the product belongs.
Question Category	The category to which the question belongs.
Subject	The subject specified by the user to create a service request.

Click the hyperlink provided for the service request number to view the details:

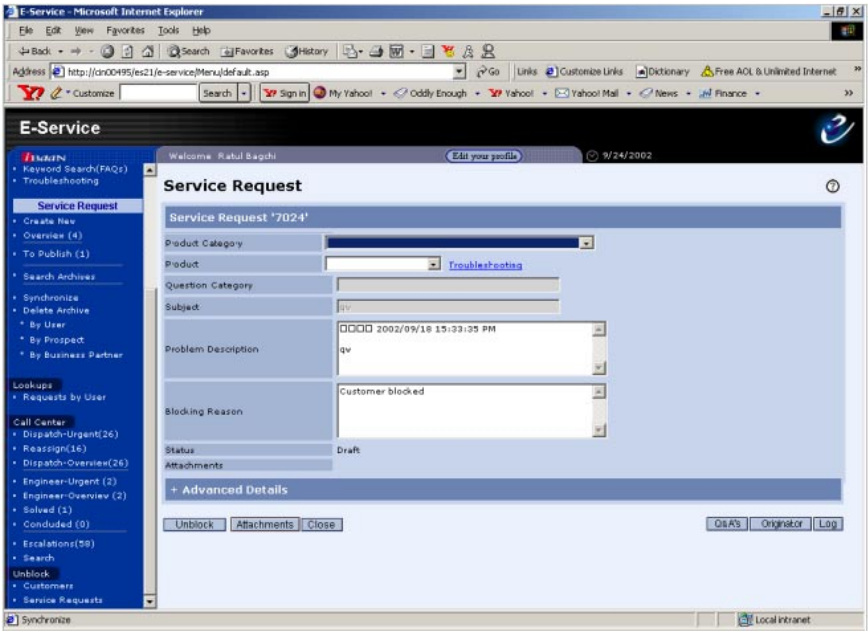

Figure 6-7 Service Request page

View the following details related to a service request on this page:

Fields	Description
Product Category	The category to which the product belongs.
Product	The name of the product.
Question Category	The category to which the question belongs.
Subject	The subject specified by the user to create a service request.
Problem Description	The detailed description of the problem.
Blocking Reason	The reason for blocking the service request.
Status	The status of the service request.
Attachments	The attachments linked to the service request.

You can view the following advanced details on this page:

Fields	Description
Site	The site code.
Installation	The installation code.
Problem Code	The problem code
Problem Priority	The problem priority.
Reference	Enter the reference text.
Preferred Start Date	The date on which the service request must be processed.
Request for Onsite Visit	View the option specified by the user for onsite visit.

The following options are available on this page:

- Click **Unblock** to unblock the service request.
- Click **Attachments** to add attachments to the service request.
- Click **Close** to go to the service requests overview page.
- Click **Q&A** to view the problem and solutions detail related to the service request.
- Click **Originator** to view the details of the user who created the service request.
- Click **Log** to view the transactions log related to the service request.