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EFACTORY SERVICE SECTION GUIDE

Modified by Douglas Jensen-MinnCAP

Adsystech Inc.

8401 Colesville Road Suite 450
Silver Spring, MD 20910
800.237.9785 Toll Free
301.589.3434 Voice
301.589.9254 Fax
www.adsystech.com

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eFactory Overview

The eFactory Library gives Local and System Administrators a way to manage support issues. Access to pages and resources of the system depend on permissions granted to the User.

For more information on definitions of Technical Service Status definitions, Severity or Priority Levels, or the Escalation Process, please see the Technical Services Guide.

Users (Case managers, data input, etc.) will have access only to the Service Ticket popup window and not to the pages in the eFactory Library. Local Administrators can print out page 3 of this Guide for those Users, giving them instructions on how to submit trouble tickets. The page is also available as the Service Ticket Instructions document. Local Administrators may want to provide information that is more specific to their Users about what they want included in the service tickets.

The Service Ticket popup window creates Tier 1 tickets only.

Local Administrators – Tier 1 – will be able to search for and respond to Tier 1 tickets; they will be able to create Tier 1 and Tier 2 tickets.

System Administrators – Tier 2 – will be able to search for and respond to Tier 1 and Tier 2 tickets; they will be able to create Tier 1, Tier 2 and Tier 3 tickets.

Basic Process

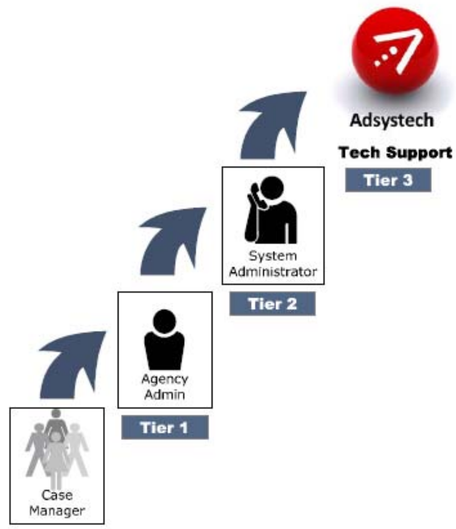
- Ticket created by User, Tier 1 or Tier 2
- Next level gets ticket
  - Can Open and resolve issue
  - Can resolve issue and close ticket
  - If no resolution, can escalate ticket to next Tier level
- At each change in status, email notification is sent the staff in the Contact List
- If owner feels issue is not resolved when closed, owner can reopen ticket

Ticket Tier and Severity

Each ticket has a Tier level assigned as well as a Severity level.

Tech Support Escalation Flow

- Case Manager
  - All Users can create support Tickets
  - Creates Tier 1 ticket
- Tier 1 Agency Admin
  - AA manages local issues
  - Responds to Tier 1 tickets
  - Escalates to or creates Tier 2 tickets
- Tier 2 System Admin
  - SA manages regional issues
  - Responds to Tier 2 tickets
  - Escalates to or creates Tier 3 tickets
- Tier 3 Adsystech Support
  - Adsystech support manages system admin issues
  - Responds to Tier 3 tickets only



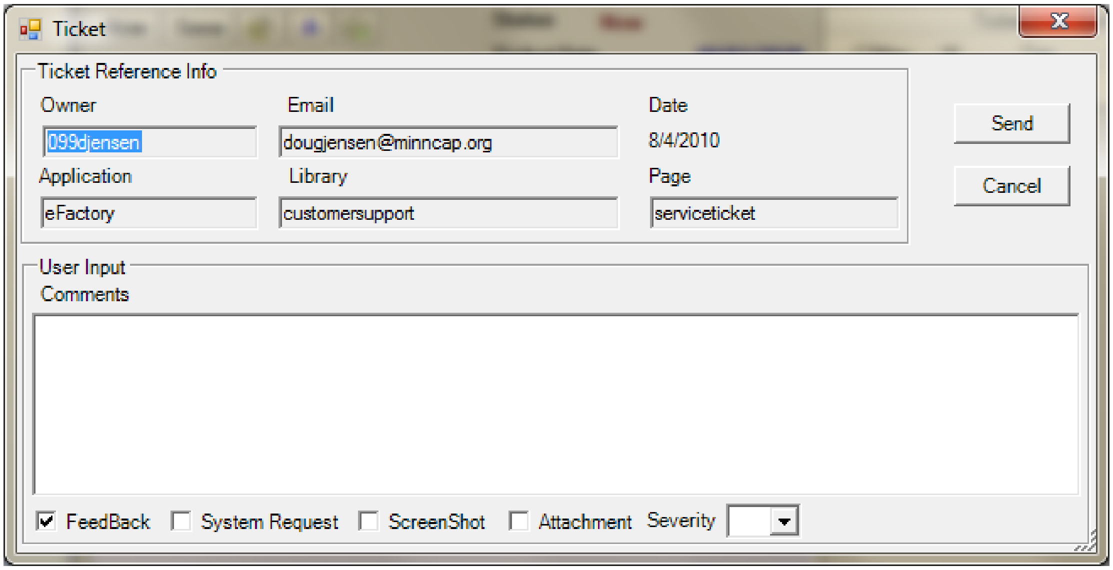
Severity Categories

- Severity levels are set when the ticket is created

Severity Categories		
1	Critical	Inability to continue day to day production e.g. Click Save button and system does not save.
2	High	Critical issue hindering system production. Must be working ASAP. E.g. new logic in important report need to be added.
3	Medium	Minor errors which can be worked around. E.g. Can run report showing Clients enrolled in agency but I can see the list from the agency listing page & can print from there.
4	Low	Items within the scope of work which would be nice to have and no hurry to implement. Next major release items, enhancement request.

Service Ticket popup window

Users can create Service Tickets by clicking on the toolbar button. 



Create Service Ticket

1 Click Ticket toolbar button to open popup window

In popup window, Information will appear automatically in top fields, including:

- o Owner = user's login ID
- o Email = email address entered when Login ID was created
- o Date = date service ticket is created
- o Application = module active at that time (HMIS, Head Start, CSBG, etc.)
- o Library & Page = The page and library open at the time of ticket

2 Enter description of problem in Comments field
  a The more clear and thorough the description, the easier it will be for support to find the solution

3 If User wants email feedback in response to this issue, click to create checkmark in Feedback checkbox
  This is checked by default

4 If the issue is not related to a specific page, click to create checkmark in System Request checkbox

5 If User wants to attach a screenshot of the issue, click to create checkmark in Screen Shot checkbox
  a The screen shot will automatically appear on the bottom part of the ticket window

6 If User wants to attach a graphic copy of the error message, check the Attachment box
  a The graphic will appear below.
  b Users can only make use of the Screen Shot OR the Attachment, not both.

7 Select Severity Level
  a 1 is the most severe – the issue is preventing you from doing your job
  b 4 is the least severe and is the default

8 If related to a Test Case, select it in the Test Case dropdown

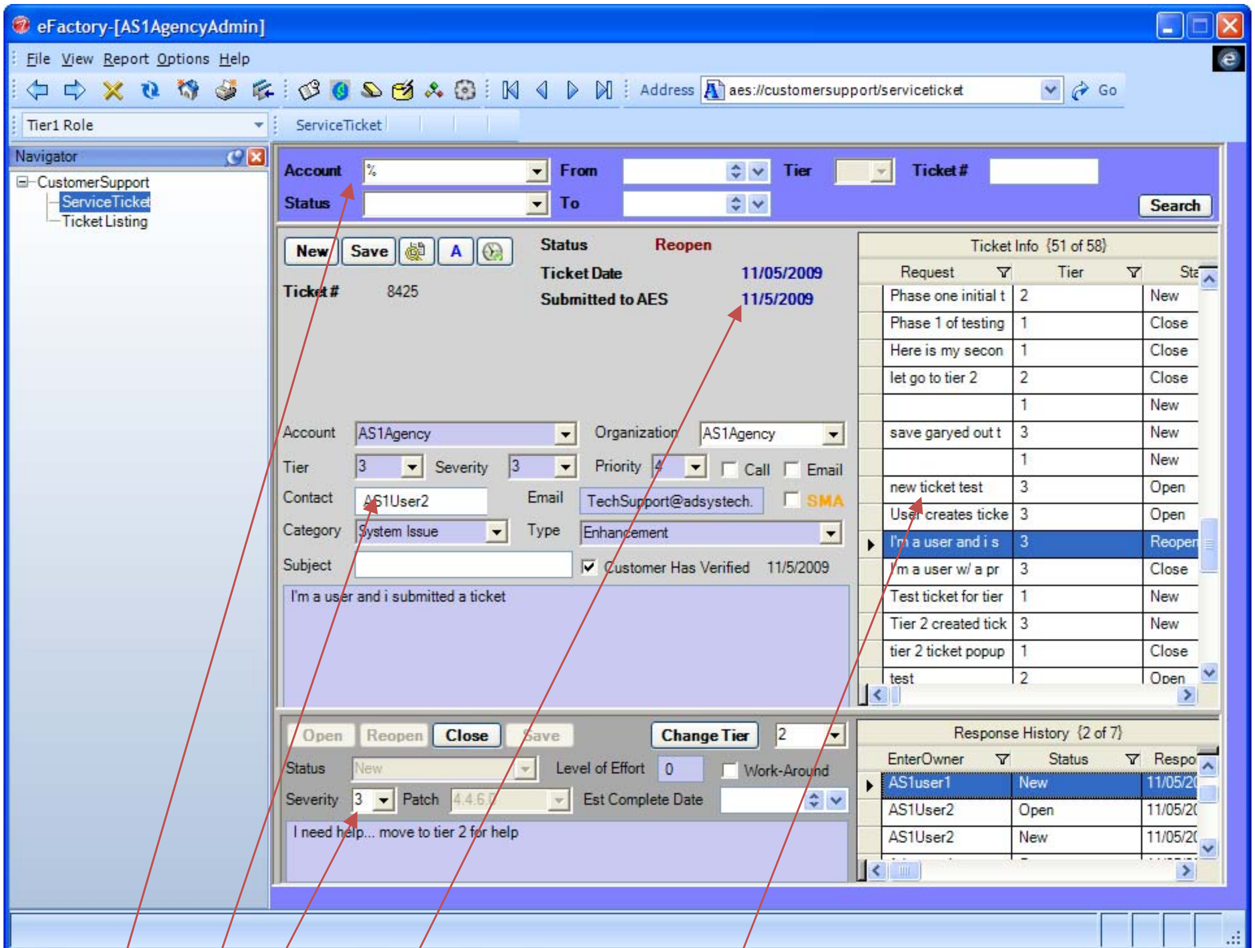
9 Click SEND button
  a A message will appear saying the Ticket has been sent and will show the Ticket Number

10 Click CLOSE button

The ticket will be the responsibility of the Agency's Local Administrator, who will respond to the issue. If you have requested feedback, you will receive an email. If they cannot resolve the issue, they will escalate the ticket to your System Administrator, who will respond to the issue.

Service Ticket Page

Support uses this page to view and respond to new and existing Service Tickets. Tickets can also be created on this page. An email notification is sent whenever the status of a ticket changes.



Navigating the Service Ticket Page

- Filter fields are located in the top section
- All matching Tickets will be displayed in the <u>TICKETS INFO GRID</u>
- The middle section displays information about the selected Ticket
    - o New tickets can be created here also
- Responses are created and displayed in the bottom section
- SUBMITTED TO AES date will appear when ticket has been changed to Tier 3 only

Search for and View Existing Service Ticket

1 Select or enter any combination of
   a Account
   b Ticket Status
   c Date Range From and To
   d Tier Level
   e Ticket Number
   f % is a wildcard allowing searching all options
2 Click SEARCH button

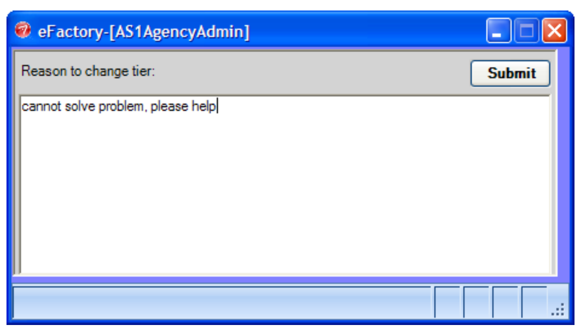
Matching tickets will appear in TICKET INFO GRID at right side of page. Select any ticket in Grid to view details at left. Bottom section will show response history for selected ticket.

Respond to ticket issue

In bottom section, buttons will vary according to status of selected ticket.

If ticket is this Status:	these buttons will be available:			
NEW	OPEN	CLOSE	CHANGE TIER	
OPEN		CLOSE	CHANGE TIER	
WAITING FOR RESPONSE	OPEN	CLOSE	CHANGE TIER	
CLOSE			CHANGE TIER	REOPEN
REOPEN		CLOSE	CHANGE TIER	

1 Select ticket record in TICKET INFO GRID
2 To OPEN a ticket to respond:
   a Click OPEN button
      i) Top section of page will gray out
   b Current Status will be displayed in Status field (Open)
   c Enter Level of Effort
   d Select Severity
   e Enter Estimated Complete Date
   f Enter response in text field at bottom
   g Click SAVE
3 To CLOSE a ticket
   a Click CLOSE button
   b Current Status will be displayed in Status field (Close)
   c Enter Level of Effort if needed
   d Enter Severity if needed
   e Enter response in text field at bottom
   f Click SAVE
4 To CHANGE TIER level of a ticket
   a Select new Tier in dropdown
   b Click CHANGE TIER
   c In popup window, Enter reason to change tier
   d Click SUBMIT
5 To REOPEN a ticket
   a Click REOPEN
   b Enter response in text field at bottom
   c Click SAVE



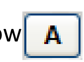
Status Definitions

- NEW = A customer or technical services member has created a new issue for review
- OPEN = ticket is open and the resolution for the issue is being worked on
- CLOSE = The issue is resolved or the customer no longer needs assistance
- REOPEN = Customer does not feel the issue is completely resolved and has provided additional information to assist with resolution
- WAITING FOR RESPONSE = Receiver of ticket needs more information to resolve issue and is waiting for owner of ticket to respond

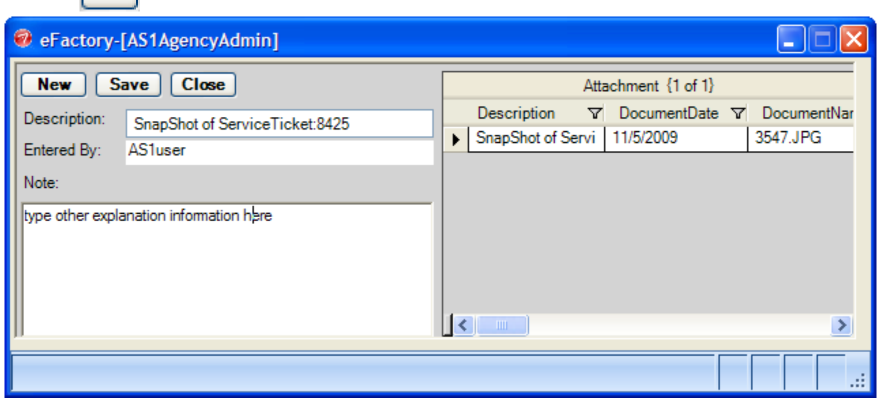
Create New Service Ticket

1 Click NEW button in middle section
2 Select Account
3 Select Organization
4 Select Tier
   a Tier 1 support can create Tier 1 or Tier 2 tickets
   b Tier 2 support can create Tier 2 or Tier 3 tickets
5 Select Severity
   a 1 is most critical = catastrophic production problem – the issue is preventing work from being done
   b 2 = system is functioning but in severely reduced capacity, exposed to potential loss or interruption of service
   c 3 = medium-to-low impact, impairs some operations, but allows client to function
   d 4 = general use question or recommendation for future enhancement or modification
6 Select Priority
   a 4 is the default = request made in advance of need that is easily handled with SLA
   b 3 = experiencing above average operational impact from issue and does not have above average or extenuating circumstances
   c 2 = requesting faster than average response based on actual business need
   d 1 = experiencing significant productivity impact that has affect outside of personal productivity
7 Click to create checkmark to indicate if ticket originated with Call or Email
8 Select Contact
   a Email address will fill it automatically, but can be overwritten
9 Select Category of issue
   a System Issue
   b Page issue
   c Other Issue
10 Select Type of issue
   a Fix
   b Enhancement
   c Suggestion
11 Enter Subject
12 Enter text of issue
   a the more clear and thorough the description of the issue, the easier it will be to resolve

To add attachment:

13 Click A button to open popup window 

14 In the popup window
   a Click NEW button
      i) Navigate to file to attach in popup window and click OPEN
   b Enter Description of attachment
   c Entered by fills in automatically
   d Enter Note information
   e Click SAVE button
   f Click CLOSE when finished
15 Click SAVE button

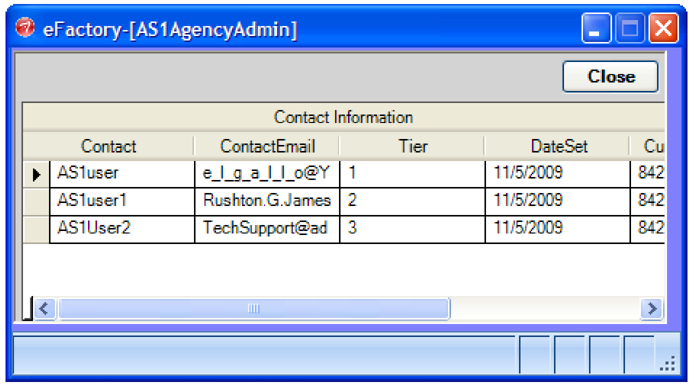


> ***➤ Tech Support Escalation Flow:***
>
> ***Case Manager:*** *All Users can create support tickets – creates Tier 1*
>
> ***Tier 1 Agency Admin:*** *AA manages local issues; responds to Tier 1 tickets and escalates to or creates Tier 2 tickets*
>
> ***Tier 2 System Admin:*** *SA manages regional issues; responds to Tier 2 tickets and escalates to or creates Tier 3 tickets*
>
> ***Tier 3 Adsystech Support:*** *Adsystech support manages system admin issues; responds to Tier 3 tickets only*

View Contact History

1 Select ticket in TICKET INFO GRID 
2 Click CONTACT HISTORY button

Popup window will display each contact (User ID) associated with the ticket, along with their Email address and Tier Level.
These contacts are the ones who will receive email notifications.



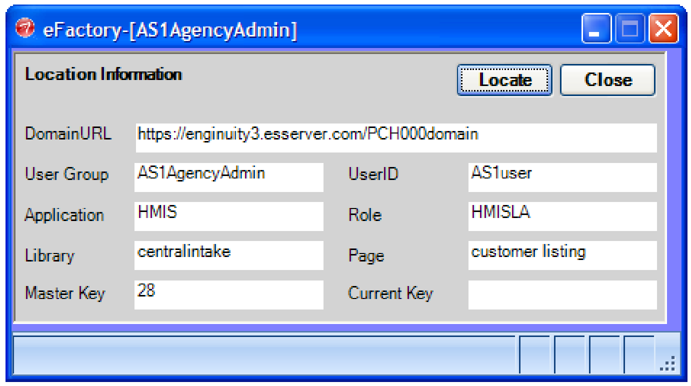
View Issue

1 Select ticket in TICKET INFO GRID
2 Click LOCATE TO THE PAGE button 

Popup window will display information about the issue.

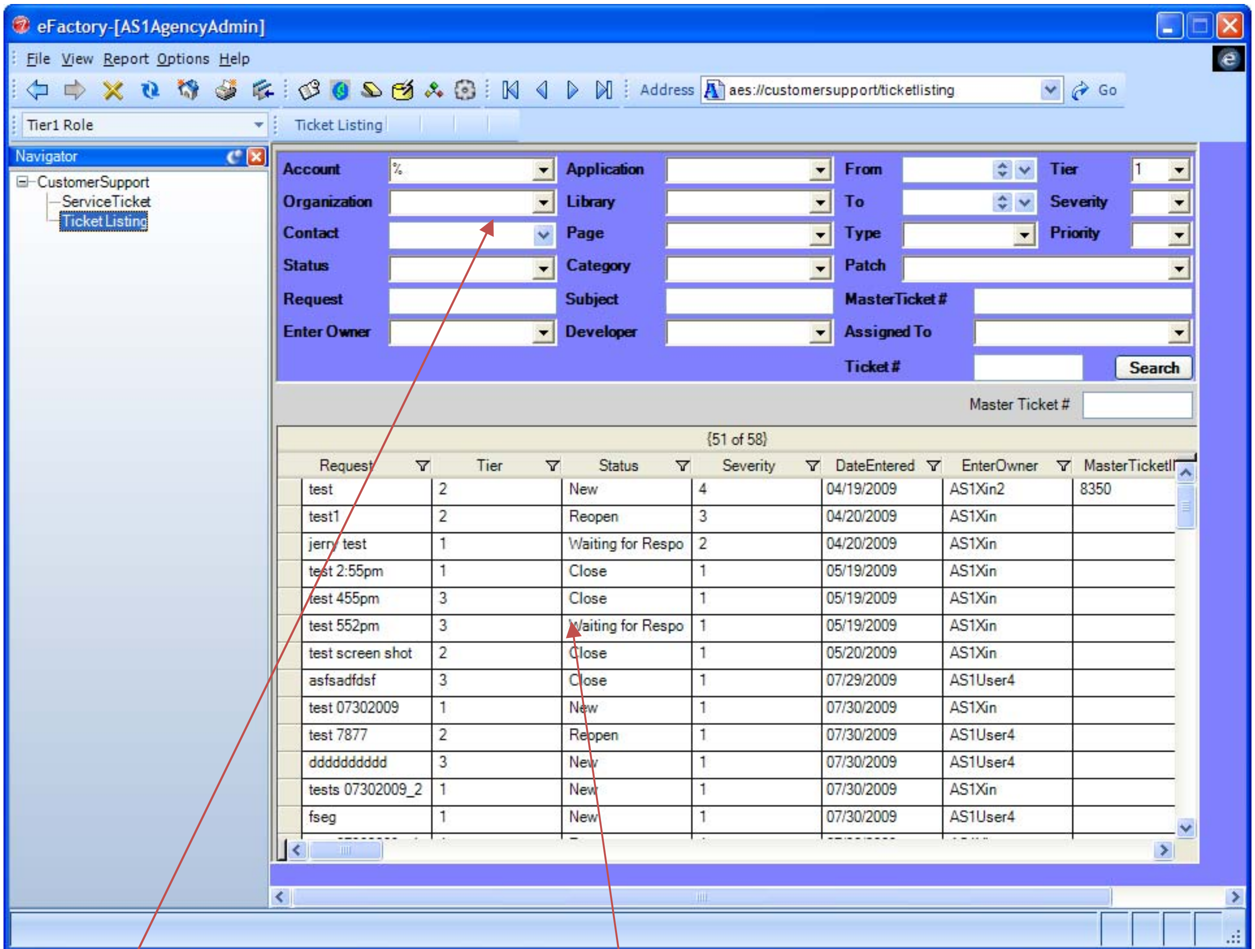
3 To see the issue, click LOCATE button

Another instance of Enginuity will open with the page in question visible, with the same permissions as the User who submitted the issue.



Ticket Listing Page

Use this page to search for a Ticket. Master Tickets can also be created on this page. Tickets appearing in the Grid on this page will also be displayed on the Service Ticket page.



Navigating the Ticket Listing Page

- Filter fields are located in the top section
- All Matching Ticket records will be displayed in the grid

Locate a Ticket record

1 Enter or select one or both of the following:
- a Account
- b Ticket Number

2 Add any of the following to the search parameters:
- a Organization
- b Contact Name
- c Status
- d Request
- e Enter Owner
- f Application
- g Library
- h Page
- i Category
- j Subject
- k Developer assigned to ticket
- l Start and/or End Date
- m Type
- n Tier
  - i) 1 for Local Administrator resolution
  - ii) 2 for System Administrator resolution
  - iii) 3 for Adsystech resolution
- o Severity (1 being the most severe)
- p Priority
- q Patch
- r Master Ticket number
- s Staff assigned to ticket

3 Click SEARCH button
- a Matching Ticket records will be displayed in GRID at bottom of page
- b Total number of tickets will be displayed above grid

Create a Master Ticket

Set one ticket as the Master Ticket if there are multiple tickets all dealing with the same issue.

1 Select the ticket to become the Master in the Grid

2 Right-click on that ticket record

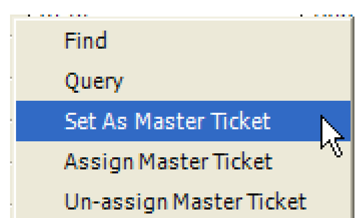
3 Select SET AS MASTER TICKET

4 Master Ticket number will be created and will be the same as the original Ticket Number

5 Select all tickets that report the same issue

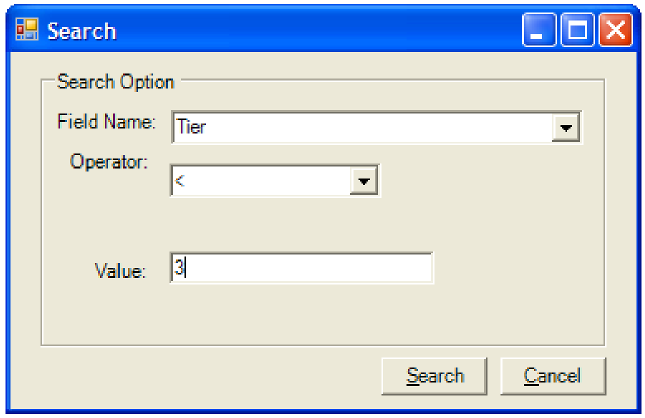
6 Right-click

7 Select ASSIGN MASTER TICKET
- a Use UN-ASSIGN MASTER TICKET to remove tickets from group



The child tickets of the Master Ticket will automatically be closed.
You can now search for those tickets using the Master Ticket number.

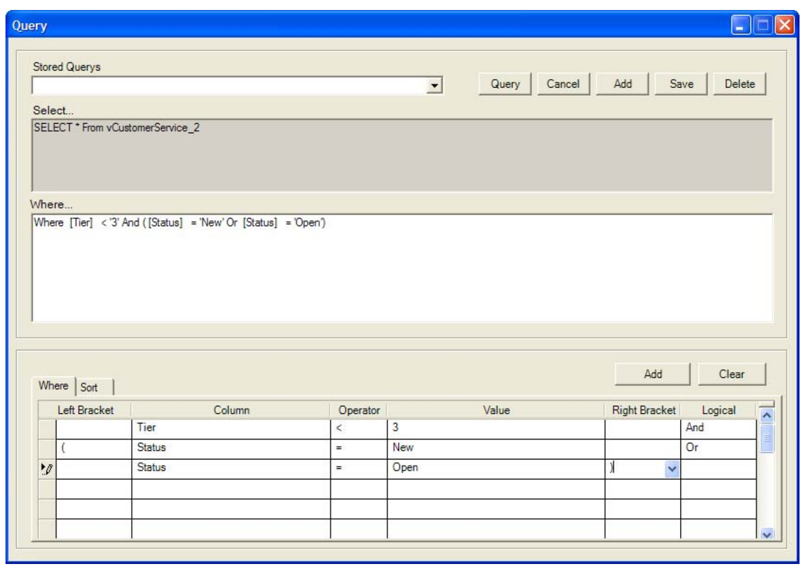
Search for Ticket by other Criteria



1 Right Click in the Grid area
2 Select FIND
3 In the Dialog box, select or enter the three fields:
4 **Field Name** = the criteria available to be searched
5 **Operator** = how to match
   a **=** Equal to, will match exactly
   b **!=** Not Equal to, will not match
   c **>** Greater than
   d **<** Less than
   e **>=** Greater than or equal to
   f **<=** Less than or equal to
   g **Like** uses **%** as a wildcard character, so entering M% matches Mike, Michael, MMM; it is not case sensitive so M%T% is the same as m%t%, both will match maaaaaTxx
   h **Not Like** is the reverse of Like
   i **Between** and **Not Between** is useful for ranges of data
   j **Is Null** lists all records with no entry for that field
   k **Is Not Null** lists all records that do have an entry for that field
6 **Value** = what to match
   a Enter the text to match the parameter chosen for the Field Name
7 Click SEARCH

Matching Clients will appear in CLIENT LISTING GRID.

Search by more than one Criteria



1 Right Click in the Grid area
2 Select QUERY

In the popup window:

3 Select the WHERE tab
4 Left Bracket are needed only when grouping items
5 Column = 1st parameter to search by (i.e. Tier, Status, etc.)
6 Operator = how to match (see descriptions in *Search by other Criteria* above)
7 Value = what to match (i.e. New)
8 Right Bracket are needed only when grouping items
9 To add another parameter, select AND or OR in Logical column
   a AND = Client must match ALL criteria
   b OR = Client must match ANY one or more of the criteria
10 Add additional Criteria if needed
11 Click ADD button when finished
   a Use CLEAR to remove criteria
12 To add a Sort parameter:
   a Click SORT tab
   b Select the parameter to sort by in the dropdown
   c Click the >> button (<< removes a parameter)
   d Click ADD
13 Click QUERY to begin the search

Matching Clients will appear in CLIENT LISTING GRID.