### Setting up a widget / view

In order to view your team's Calls you need to set up either a Widget or View tab (for your team).

From the Agent Console, click on the Customize button on the action bar.

If you prefer a **Widget**, expand the widgets tab by clicking the small plus sign.

If you prefer a **View tab**, expand the views tab by clicking the small plus sign.

Drag the Saved Search object for either the Widget or View Tab to the appropriate area:

- **For Widgets**: Drag widgets to Drop widgets here....
- **For View Tabs**: Drag saved search to this large green shaded area....

In **View Properties**:

a) Name the search **My Teams Open Calls**

b) In the **Search Name** drop-down select your teams managed search.

Click the **Save** button and close the Console edit tab to return to your homepage.

Note: The widget or view tab will be visible the next time you refresh the browser or the next time you log in.

### Console Navigation

#### My Widgets

Your saved Widgets.

- **TOP TIP**: You can save your Widgets (via Console Properties) to tap, left, right and bottom of the homepage according to your preference.

#### Change Management Console

Used to manage changes to the operational environment. Access is restricted to IT Services or authorised agents only.

#### Searching for Calls

You can search using specific words (contains) or via a specific Call Reference Number (Ticket Number).

### Action Bar

- **Call logging buttons** - to enable you to log a Call to a specific Department.
- **Customize button** - enables you to customize your view. E.g. add widgets / view tabs.

### The Knowledgebase

Knowledge Articles visible to both agents and customers. Agents can draft articles and assign to specific staff to review and publish.

### Royal Holloway Service Catalogue

A collective list of RHUL services, a description of each and access to specific customer request forms.

- **TOP TIP**: Show your customers how to access and complete specific service request forms. It’s a great way to ensure that you get the information you need upfront.

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**URL**: https://enquirymanagement.royalholloway.ac.uk
How to Log a new Call

**Step 1:** Click on the relevant New Call button on the action bar.

You will be presented with a Call logging form.

**Step 2:** Select Incident, Request or Task as the Call Type.

- **TOP TIP:** Incident (bug, fault, failure, defect, broken)
  - Request – request for advice, guidance, information, access.
  - Task – internal request for action, agent to agent, can you do "yes".

**Note:** The Call Type determines what fields values are visible (can be used) on the call logging form.

**Step 3:** Complete all the required fields and any other optional fields.

**Step 4:** Type a Description detailing information about the Call.

**Step 5:** Link the Contact Information

**Step 6:** Complete Categorisation.

**Step 7:** Assign the Call.

**Step 8:** Add attachment(s).

**Step 9:** Click the 'Submit' button.

The Call is logged, a unique reference number allocated and customer informed with an automatic email.

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How to Resolve or Close a Call

- Locate and select the Call
- Click on the Edit button if it opens in View Mode
- Change the Status to Resolved for Incident or 'Completed' / 'Declined' for Requests or Tasks
  - Incidents – pick the relevant item from the Resolution, Root Cause and Continual Service Improvement (CSI) drop-downs
  - Tasks and Requests - just pick the relevant item from the Resolution drop-down
- Enter the Outcome Text...
- Ensure that you update the Description
- Click on the Submit button.

How to Edit a Call

- Locate and select the Call
- Click on the Edit button if it opens in View Mode
- Make any changes
- Ensure that you update the Description
- Click on the Submit button

How to Link Calls

- Click on the Link To button in the Linked Items section on the Call logging form
- Select the Calls that you wish to link to
- Click on the Link button

How to Request More Information / Provide a Call update

- If the Call isn’t in Edit Mode, click on the Edit button.
- Add text to the ‘Description’ field
- Change status to ‘Waiting for Customer Response’
- Click on the submit button.

Impact and Urgency

Always select the relevant Impact and Urgency rating, this determines the priority of the Call, how quickly we respond / fulfil. The Default is set at 4.

Moving Calls

To move a Call to another department, use the move function from the Actions menu.

Call History

Full audit history is kept on all Calls, accessible via the 'History' section on the Call logging form. It displays both User and System actions, useful for Call investigation.

Spell Check

Press (Ctrl and Right Click) or just Right Click to display the dictionary options for misspelt words.