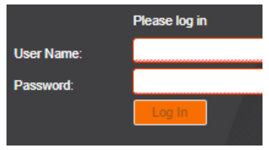
ENQUIRY MANAGEMENT SYSTEM (EMS) REQUEST & INCIDENT MANAGEMENT QUICK REFERENCE GUIDE

Getting up and running

URL: https://enquirymanagement.royalholloway.ac.uk

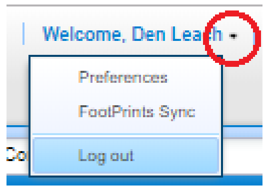
Logging in

Sign in using your College credentials (userid and password)



Logging Out

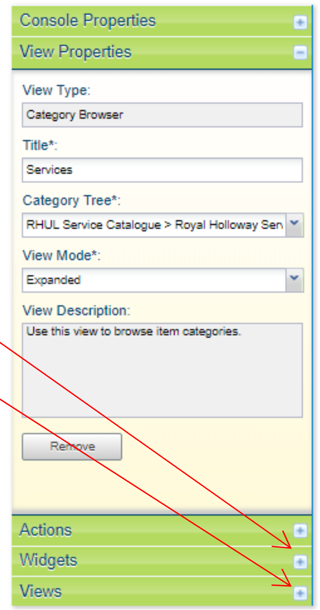
Navigate to the drop-down located top right, select 'Log out'.



Setting up a widget / view

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

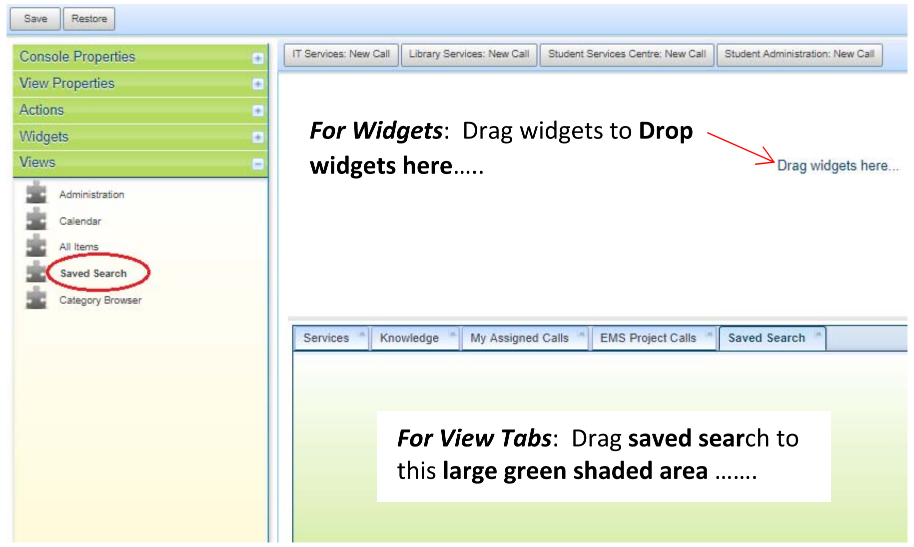
From the **Agent Console**, click on the **Customize** button on the action bar.



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

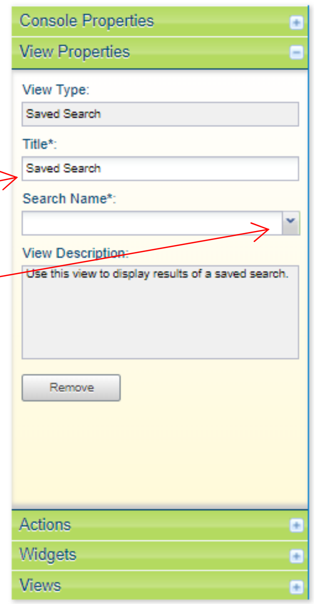
If you prefer a **View tab**, expand the views tab by clicking the **small plus sign**.

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



For Widgets: Drag widgets to **Drop widgets here**.....

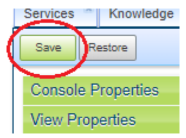
For View Tabs: Drag **saved search** to this **large green shaded area** ....



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 regurn 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 top, 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.

TOP TIP: *You can remove the 'Call logging' buttons that you won't use by customizing your Console and deleting the unwanted button.*

My view tabs

Displays a list of Calls within my team.

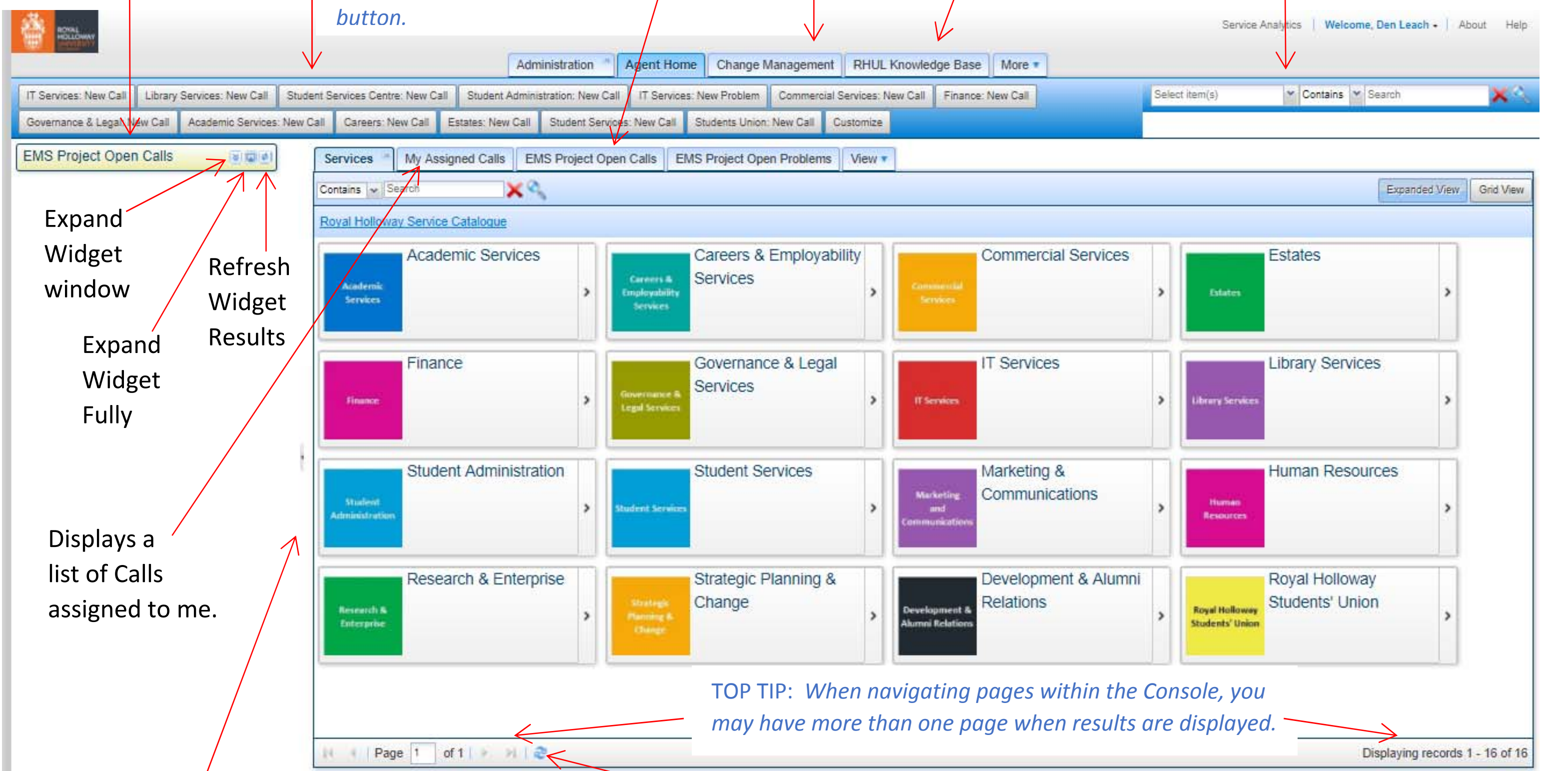
The Knowledgebase

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

TOP TIPS:

Call ID searching must include the prefix. E.g. IT-1234

You can search more than one workspace at a time. E.g. Select IT Services Call and Library Services Call.



Expand Widget window

Refresh Widget Results

Expand Widget Fully

Displays a list of Calls assigned to me.

TOP TIP: *When navigating pages within the Console, you may have more than one page when results are displayed.*

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 your services via the catalogue. It's a great way to ensure they know how to obtain access to your services.*

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.*

Page / Result Refresh

Click this to refresh your page/results.

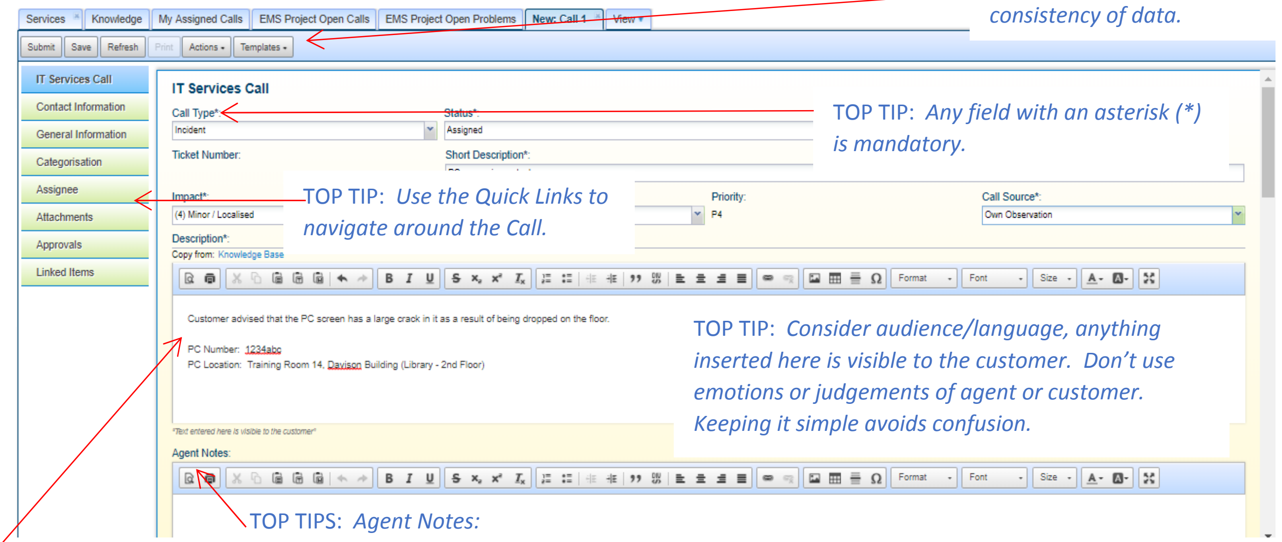
Managing my Calls

How to Log a new Call

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

TOP TIP: When logging Calls, use Call logging templates. Less manual input, greater consistency of data.

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 'xyz'.

TOP TIP: *Any field with an asterisk (*) is mandatory.*

TOP TIP: *Use the Quick Links to navigate around the Call.*

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

TOP TIP: *Consider audience/language, anything inserted here is visible to the customer. Don't use emotions or judgements of agent or customer. Keeping it simple avoids confusion.*

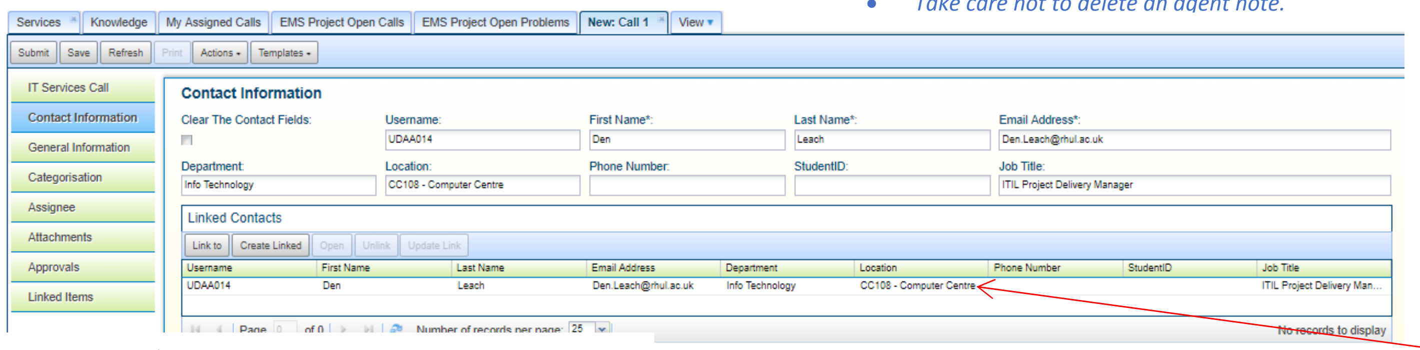
Step 3: Complete all the **required fields** and any other optional fields.

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

TOP TIPS: *Agent Notes:*

- *Not visible to customer.*
- *Not date stamped, remember to add a date for each entry.*
- *Take care not to delete an agent note.*

Step 5: Link the **Contact Information**



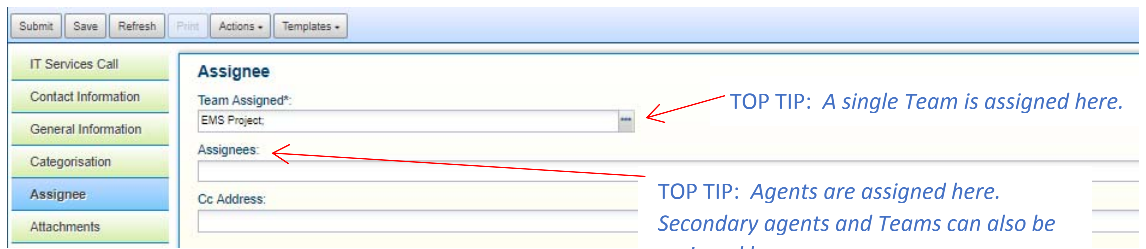
How to Add a Contact Link

- Enter the User's details into any of the relevant fields, is **First Name** or **Username**
- Click on the **Link** button or press **Enter**
- If a unique match is found it is auto-populated
- If several matches are found they are displayed in a Preview Pane
- Select the required **User Name**

TOP TIP: *To view a list of calls for a specific customer, double-click anywhere on the contact, a list of open Calls for that contact will be displayed.*

Step 6: Complete **Categorisation**.

Step 7: Assign the Call.



TOP TIP: *A single Team is assigned here.*

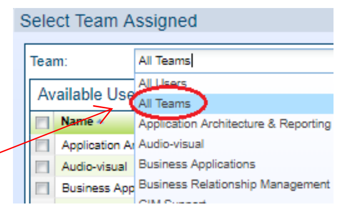
TOP TIP: *Agents are assigned here. Secondary agents and Teams can also be assigned here.*

Top Tips:

Always assign a Team, never an agent unless advised to do so by the agent.

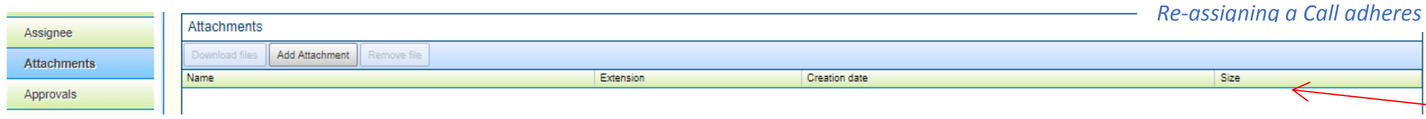
You can type the first character of the team/agent and a pick list will be presented.

When adding a Team from lookups, always use the 'All Teams' lookup.



Re-assigning a Call adheres to the same steps and principles.

Step 8: Add attachment(s).



TOP TIP: *Maximum size per attachment is 30mb.*

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

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

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)
  - o **Incidents** – pick the relevant items from the **Resolution**, **Root Cause** and **Continual Service Improvement (CSI)** drop-downs
  - o **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.

TOP TIPS:

Consider the audience/language, use non-technical speak, don't use single words such as 'done', 'sorted'.

Copy same outcome text to description before saving the Call.

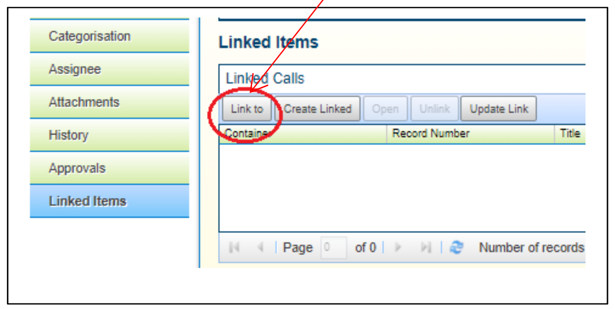
How to Edit a Call

- 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

TOP TIP: *It's easier to search by using a new condition when linking Calls*

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

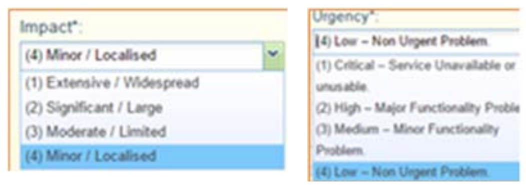
- If the Call isn't in **Edit Mode**, click on the **Edit** button.
- Add text to the 'Description' field
- Change status to 'Waiting for Customer Reponse'.
- Click on 'Submit' button.

TOP TIP:

If you need to request further information, or want to send another update, you need to come out of this status first, save the Call and then go then re-follow the steps outlined.

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.

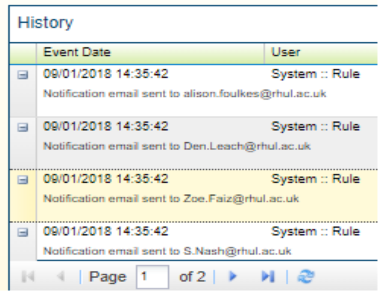


Moving Calls

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.