

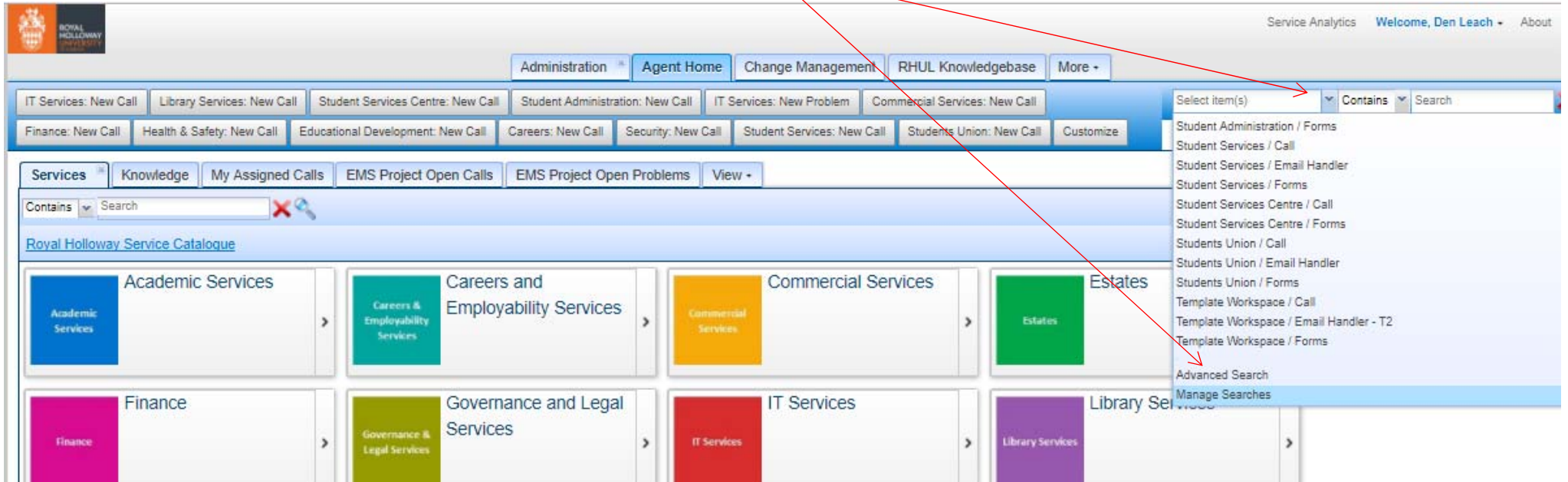
ENQUIRY MANAGEMENT SYSTEM (EMS) REQUEST & INCIDENT MANAGEMENT INSTRUCTION GUIDE

HOW TO VIEW CALLS WHERE I'M THE CUSTOMER

In order for agents to view calls where they are listed as a customer, they need to setup a managed search and link to either a widget or view tab.

To setup the managed search, follow the instructions below.

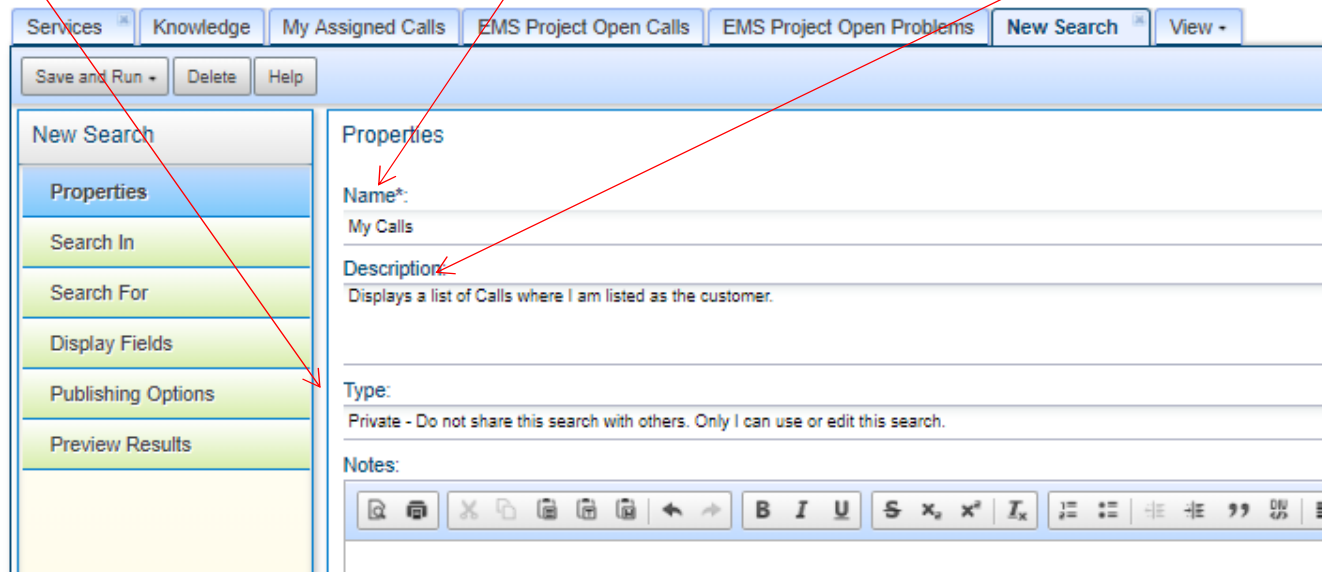
Step 1: From the **Select Item(s)** drop-down menu, navigate to **Advanced Searches**.



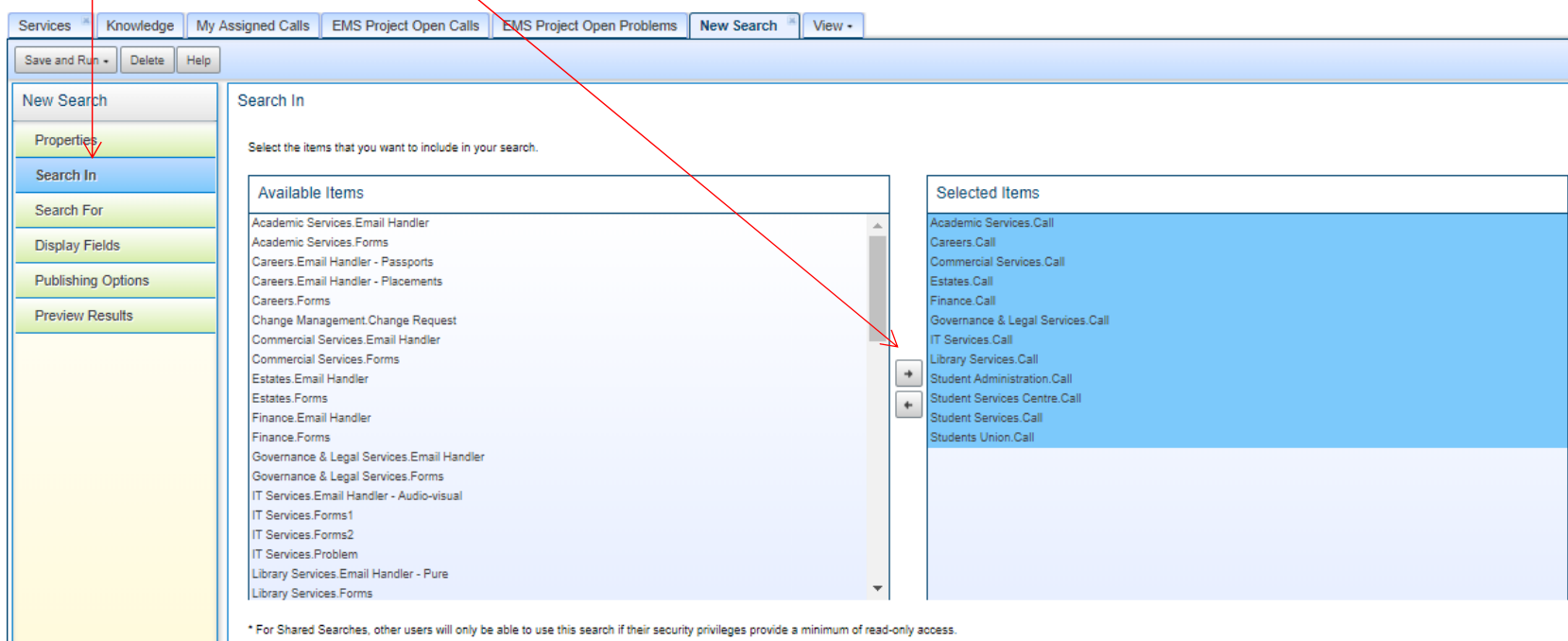
The **New Search** tab will be displayed.

Step 2: In the **Properties** section on the menu pane, insert a name in the **Name*** field (e.g. My Calls) and add a description in the **Description** field.

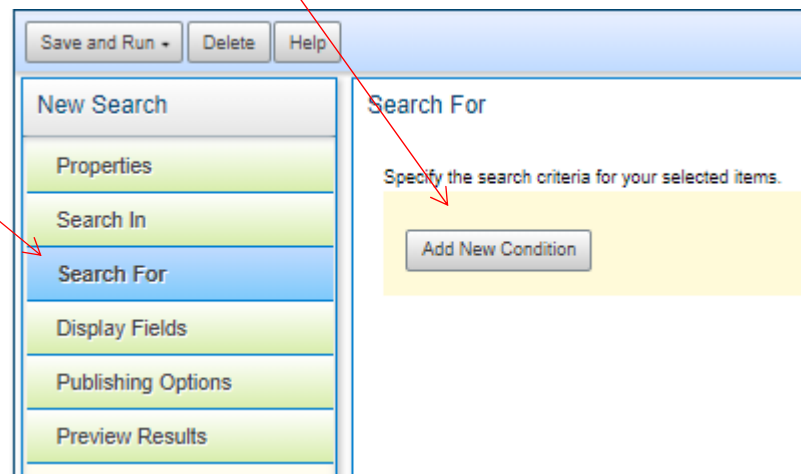
Note: Ensure **Type** is set to **Private**.



Step 3: From the **Search In** section on the menu pane multi-select all **Departmental Workspace Calls** in the **Available Items** column (hold-down CTRL and left click all Department.Call options), then click the **arrow button** to move the select items to the **Selected Items** column.



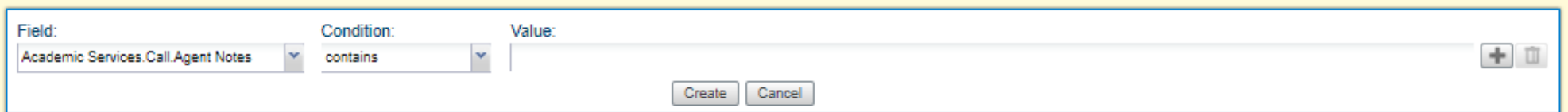
Step 4: From the **Search For** section on the menu pane, select **Add New Condition**.



You will be presented with options for selecting your search criteria.

Search For

Specify the search criteria for your selected items.

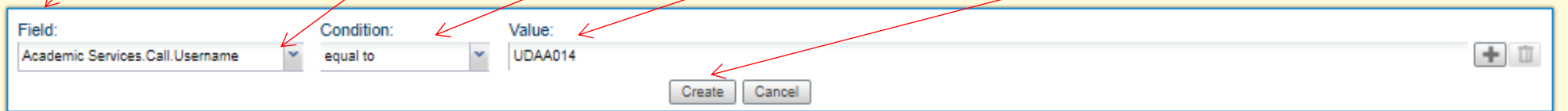


The screenshot shows a form with three fields: 'Field:' with a dropdown menu showing 'Academic Services.Call.Agent Notes', 'Condition:' with a dropdown menu showing 'contains', and 'Value:' with an empty text box. There are '+', 'Create', and 'Cancel' buttons.

Step 5: From the **Field** drop-down list select **Academic Services.Call.Username**, set **Condition** to **equal to** and insert your **userid** in the **Value** field. This click **Create**.

Search For

Specify the search criteria for your selected items.

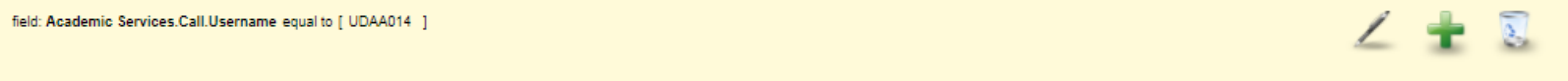


The screenshot shows the same form as in Step 4, but with 'Academic Services.Call.Username' selected in the 'Field:' dropdown, 'equal to' selected in the 'Condition:' dropdown, and 'UDAA014' entered in the 'Value:' field. The 'Create' button is highlighted.

Your search criterion is accepted.

Search For

Specify the search criteria for your selected items.

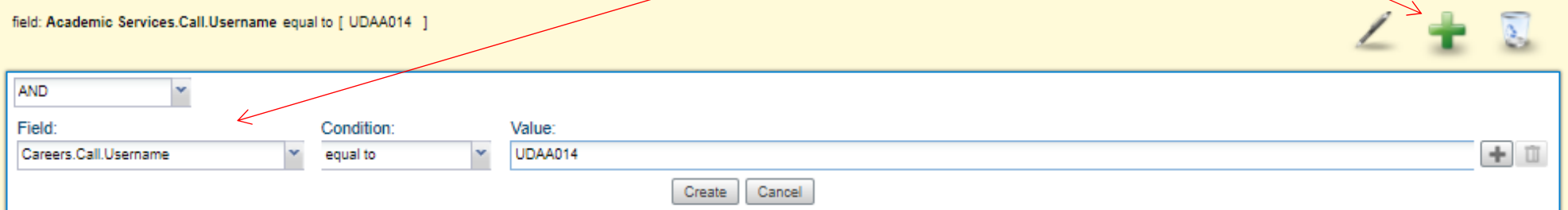


The screenshot shows a list of search criteria: 'field: Academic Services.Call.Username equal to [UDAA014]'. To the right of the list are icons for edit (pencil), add (+), and delete (trash).

Step 6: To ensure that you can view all calls for all departments you need to add all departmental workspaces to your search criteria. To **add other workspaces**, select the + sign and **repeat Step 5** until all other departmental workspaces are added.

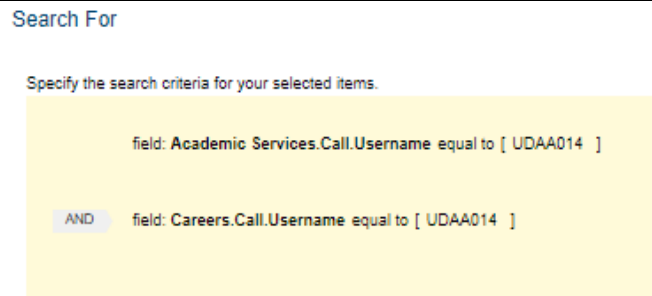
Search For

Specify the search criteria for your selected items.

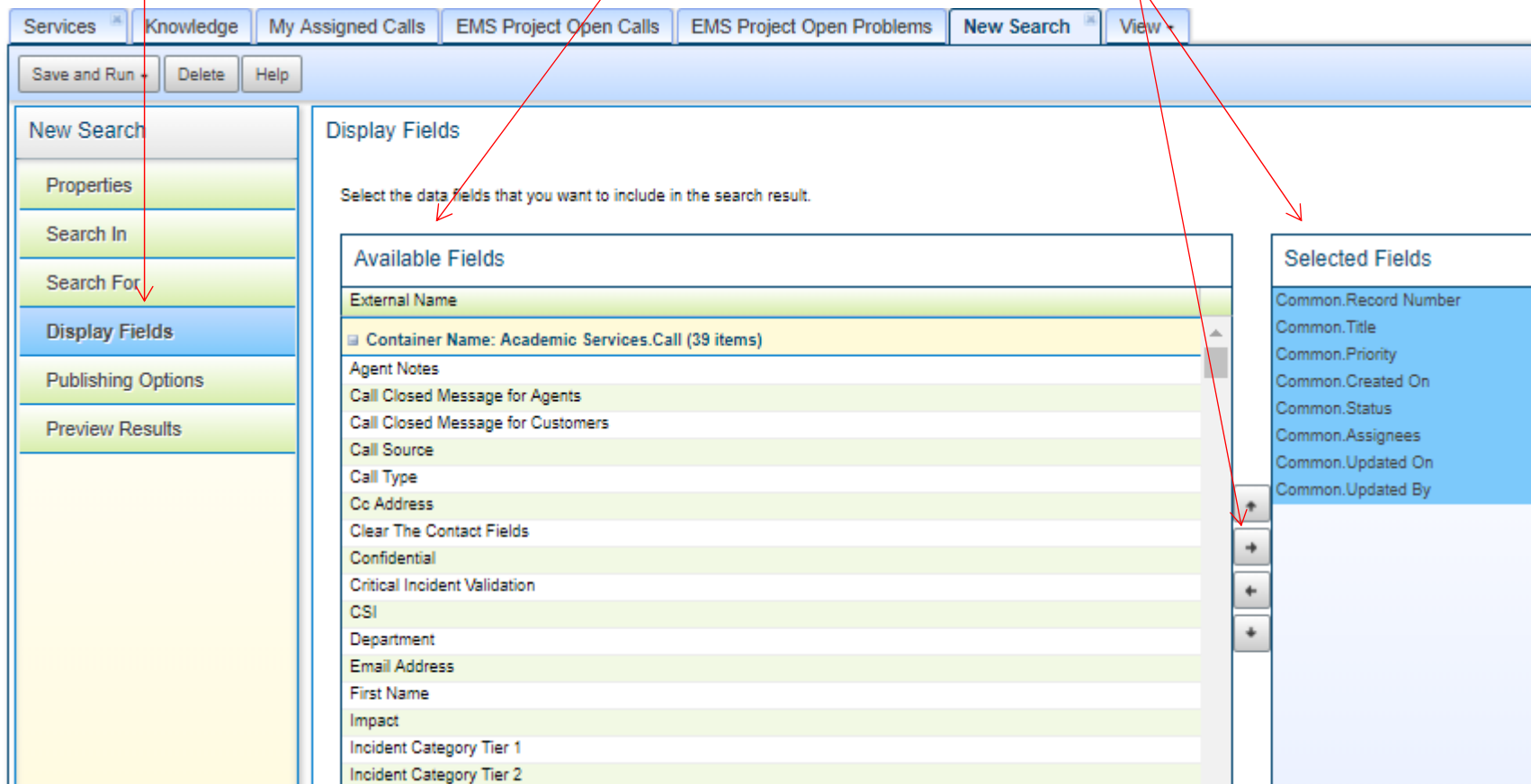


The screenshot shows the search criteria list with the first criterion: 'field: Academic Services.Call.Username equal to [UDAA014]'. A new condition is being added below it. The 'AND' dropdown is set to 'AND'. The 'Field:' dropdown shows 'Careers.Call.Username', the 'Condition:' dropdown shows 'equal to', and the 'Value:' field contains 'UDAA014'. The 'Create' button is highlighted.

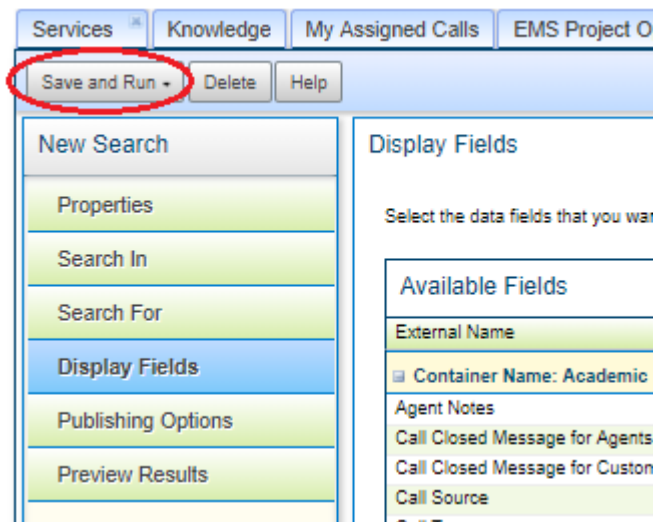
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Step 7: From the **Display Fields** section on the menu pane, select the fields that you want to be displayed in your Column View.



Step 8: Click **Save and Close** from the drop-down menu.



Your search is now saved as a Managed Search.

You will now need to link your **Saved Search** to a **View Tab** in order to display the results on the Console. Refer to the **Enquiry Management Quick Reference Guide**.