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.
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REQUEST & INCIDENT MANAGEMENT INSTRUCTION GUIDE

**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.

**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.

Your search criterion is accepted.

**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.
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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.