SUPPORT MODULE

INSTRUCTION MANUAL

OTYS Recruiting Technology

CONTENT

1 | INTRODUCTION

1.1 ABOUT THE SUPPORT MODULE

The Support module is the module to use for questions, fault messages and suggestions for the OTYS support desk. The Support module is accessible by clicking the Support icon in the top right corner of your OTYS Go! system. In this module you can create, read and respond to tickets.

When you create and send a ticket, it is automatically delivered to the OTYS help desk. A support representative will attend to the ticket.

Fig. 1 - The icon to open the Support module

1.2 INSTRUCTION OBJECTIVE

These instructions are intended for OTYS clients, to enable them to configure and use the Support module in OTYS Go!

1.3 INSTRUCTION STRUCTURE

After this introductory chapter, we explain step by step how to configure and use the Support module in OTYS Go! Therefore this instruction manual is divided into three chapters:

- Layout Support module
- Create tickets
- Read tickets

2 | LAYOUT SUPPORT MODULE

2.1 INTRODUCTION

As indicated earlier, the Support module consists of a number of components:

- On the left side a panel for statuses and filters
- In the middle a list of your tickets
- You see a preview on the bottom centre
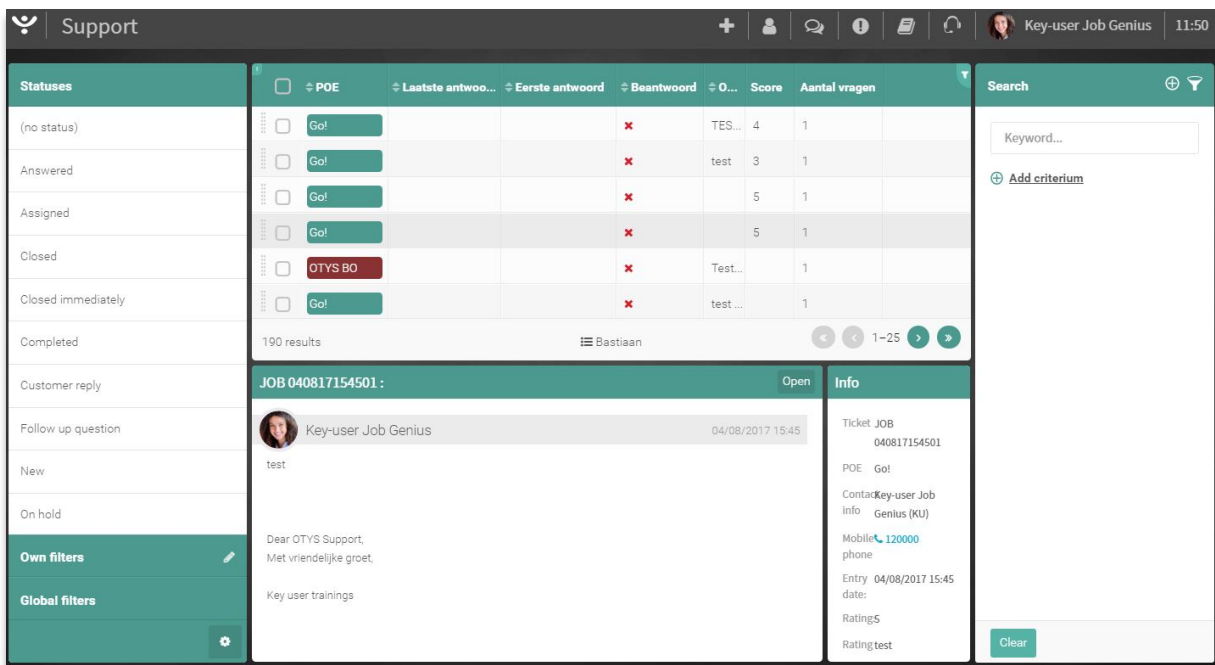- On the right side there is an advanced search panel

2.2 LAYOUT OF PANELS

Fig. 2 - The Support module

In the Support module 20% of your screen width is by default reserved for the left panel (status and filter), 60% is reserved for the centre (list) panel and the remaining 20% is reserved for the right (search) panel. For most screens, this is a logical subdivision.
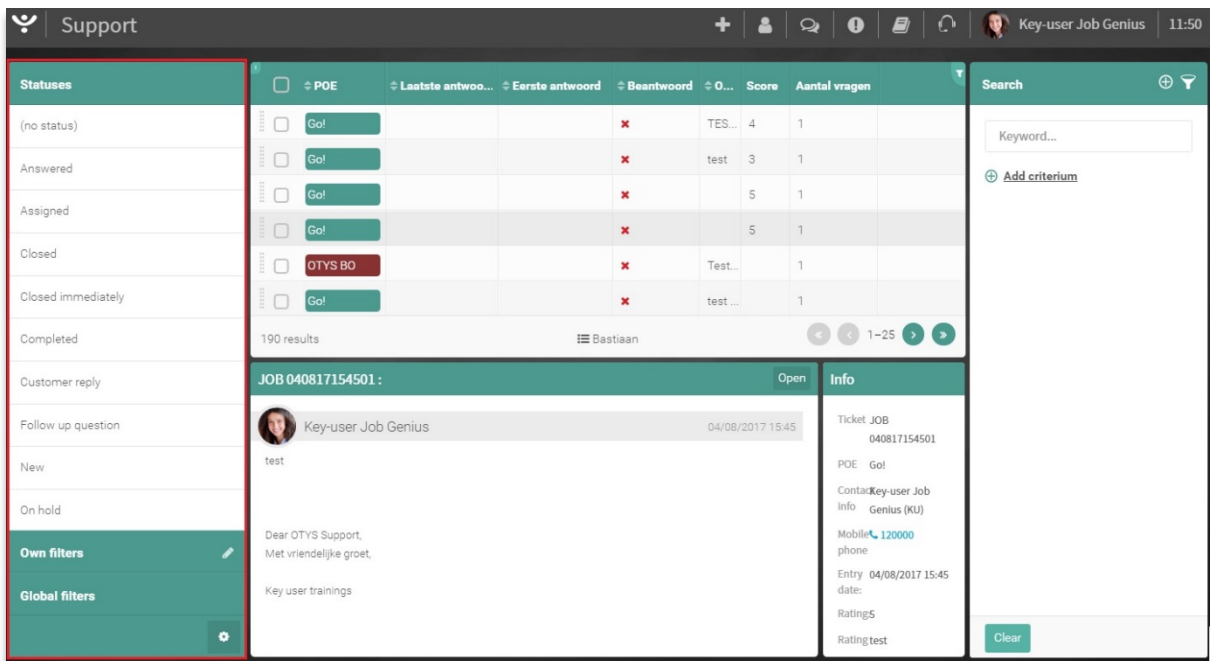It may be that you prefer another ratio or that, for example, you want to hide the entire left panel.

You can easily adapt the structure of these panels yourself:

1. Move your cursor to the space between two panels. This is the space between the left and the centre panel or the space between the centre and the right panel. You will see that your cursor (normally an 'arrow') changes into a symbol indicating that you can adjust the width.

2. Now drag the panel to the desired position by clicking it with your mouse, holding and dragging it to the desired location, where you drop it. If you want to hide the entire left panel, drag it all the way to the left. If you want to hide the entire right panel, drag it all the way to the right. You can always drag these panels back to display them again.
3. After releasing your mouse button the position of the panels is automatically saved. You do not need to click a Save button.

2.3 STATUS AND FILTER PANEL (LEFT PANEL)

Fig. 3 - Status and filter panel

2.3.1 INTRODUCTION

The status and filter panel allows you to quickly select what is displayed in the main screen. This can be done by selecting a status, but also by selecting a filter.

This panel consists of the following components by default:

- Status
  Here you can select a status to filter on immediately.
- Global filters
  These are saved searches that are available for all users within your organisation. This allows one person in your organisation to save an (advanced) search filter once, which can be easily retrieved from the module by other users. The further functioning is explained in section 2.2.

- Personal filters
  These are saved searches that are created by you and only for you. This allows you to save an (advanced) search filter once, and easily retrieve it at a later time.

2.3.2 CONFIGURATION

You can decide which items are displayed in this panel, and the order in which they appear, by following these steps:

1. Click the Configuration icon at the bottom right of the status and filter panel. A special Configuration mode will open. You will see all the available components of the panel.
2. To the left of each item you will see a switch. If this is switched to the left (green) this item is 'enabled' and is therefore displayed. If this is switched to the right (grey) this item is 'disabled' and is therefore hidden. Enable or disable the switch by clicking it.
3. To the right of each item you will see a Drag icon. By hovering your cursor over such an icon, your cursor (normally an 'arrow') changes into a symbol indicating that you can move the item. Now drag the item to the desired position by clicking it with your mouse, holding and dragging it to the desired location, where you drop it.
4. Once you have made the above changes, click the Return icon at the bottom right of the status and filter panel. You are now back in regular mode.
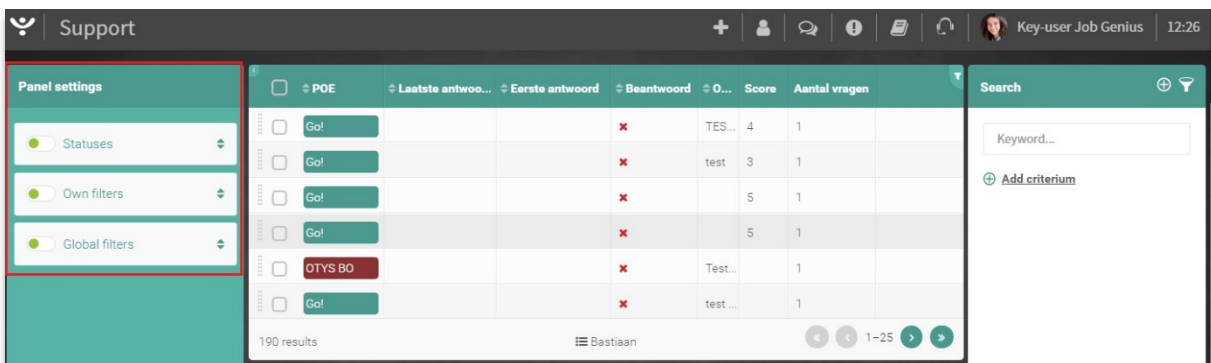

Fig. 4 - Configuration icon

Fig. 5 - Switches to enable/disable components

Fig. 6 - Return icon

2.3.3 USAGE

Each component in this panel has its own function.

The Status component allows you to filter the tickets in the main screen by clicking on a status. Click 'Finished' to only see completed tickets with the status 'Finished'. This way you can quickly get an overview of the new tickets, for example.

- At 'Personal filters' you can see a list of all self-made filters which means that they are only available to you. How to create these filters can be found further in this manual.

- 'Global filters' shows all filters created by your colleagues, that they have made available for general use. How to create these filters can be found further in this manual.
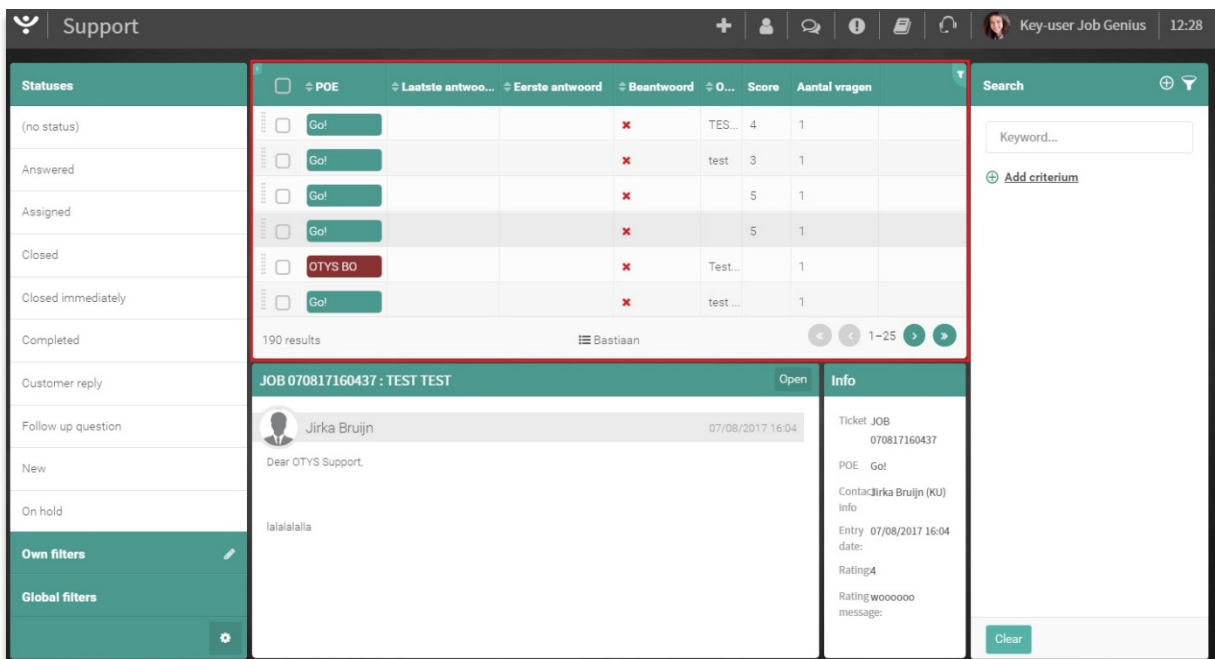
2.4   LIST PANEL (MAIN PANEL)

Fig. 7 - List panel

2.4.1 INTRODUCTION

The main panel always shows the list of tickets. The type of tickets shown depends on the set filter.

2.4.2 CONFIGURATION

You are able to choose the data displayed in this list (the 'columns') within the available columns for the relevant module. It is also possible to create multiple list views and simply change them when you want to see other data in lists at certain moments during your process.

To create a new list view, take the following steps:

1. Click at the bottom of the list on the name of the current list view (usually the 'Standard view', but it can also have another name).
2. A window with all available views will open. Click on the 'New view' button in the bottom right corner of the window.
3. A window with the new view (which should still be configured) will appear:
   a. Enter a recognisable name for the list view at 'Name'. This might be your name or your company name, but also, for example, 'Support open' or 'Support answered' if you use multiple list views.
   b. Tick 'Global view' if this view should also be available for your colleagues. If you do not do this, the view will be exclusively yours.
   c. On the right are the columns that are currently part of the new list view (these are the 'standard columns'). Click the arrow next to a column to move it to the left and thus remove it from the list view.
   d. On the left are the columns that are currently not part of the new list view. Click the arrow next to a column to move it to the right and thereby add it to the list view. Because this list on the left may be a long list, there is a filter at the top that allows you to easily search this list.
   e. After all desired columns on the right have been added, you can adjust the order by using the Move icon to the right of a column. Simply drag the column to the right position. The column at the top of this list will later appear on the far left of the actual list.

After you have set the above settings, click the 'Save' button.

Adjust existing list view

Adjusting an existing list view is very similar to creating a new list view:

1. Click at the bottom of the list on the name of the current list view (usually the 'Standard view', but it can also have another name).
2. Click the Configuration icon on the right side of the list view you want to adjust. It is not possible to adjust the standard view (from OTYS), therefore you do not see a Configuration icon next to this view.
3. Make the changes in the list view as explained in section 2.2 and click 'Save'.

The changes to your list view have now been made and your adjusted list view will open automatically. Also, the newly created list view will be immediately set as your standard view. If this is not desirable, you can edit your standard list view.

Delete existing list view

It is also possible to delete an existing list view. Take the following steps to achieve this:

1. Click at the bottom of the list on the name of the current list view (usually the 'Standard view', but it can also have another name).
2. Click the Configuration icon to the right of the list view you want to delete. It is not possible to delete the standard view (from OTYS), therefore you do not see a Configuration icon next to this view.
3. Click at the bottom right on the 'Delete' button.

The list view is now deleted and you will return to your current list view.

Set standard list view

If you have created multiple list views, you can set one list view as 'standard'. This means that when you log into your OTYS Go! environment and open a particular module, this standard list view will be displayed. Determining your standard list view is done with the following steps:

1. Click at the bottom of the list on the name of the current list view (usually the 'Standard view', but it can also have another name).
2. To the left of the list view that is currently set as standard, you will see an icon of a green drawing pin. Next to the other list views is an icon of a grey drawing pin. Click the (grey) drawing pin icon next to the list view you want to set as standard.
3. You will be asked to confirm. Click the 'Yes' button.

The selected list view is now set as your standard view and will open automatically.

2.4.3 USAGE

You can do three things with a ticket in the ticket list:

- Click once with the left mouse button
  Click once to see the ticket in the preview panel. In this way you can quickly read the ticket and determine whether it is indeed the ticket you are looking for.
- Double-click the left mouse button,
  This will open the ticket in the full window.
- Click once with the right mouse button
  Now you have a choice of two batch actions. This means that if you have ticked/selected multiple tickets, the batch operation will be executed on multiple tickets. You can choose to answer or export. If you choose to answer you will get a screen where you can enter your answer. Please note that this will be for all selected tickets. If you choose to export you will notice that an exportSupport.xls file was downloaded. The following fields are exported here: *UID, Client ID, User ID, Assigned to user ID, Reseller ID, Ticket number, Screen, Subject, Question, Answer, Answered, Date of entry, Answer date, Priority, Status, Type item ID, Module ID, Trier, Public, Ranking, Answered, Follow-up, Ticket POE.*

2.5   PREVIEW PANEL (BOTTOM CENTRE)

Fig. 8 - Preview panel

2.5.1 INTRODUCTION

The functioning is similar to that of the Email module. In the preview panel you can quickly read the information on the ticket that was selected in the top panel. This gives you a brief view of what's in the ticket without having to open it.
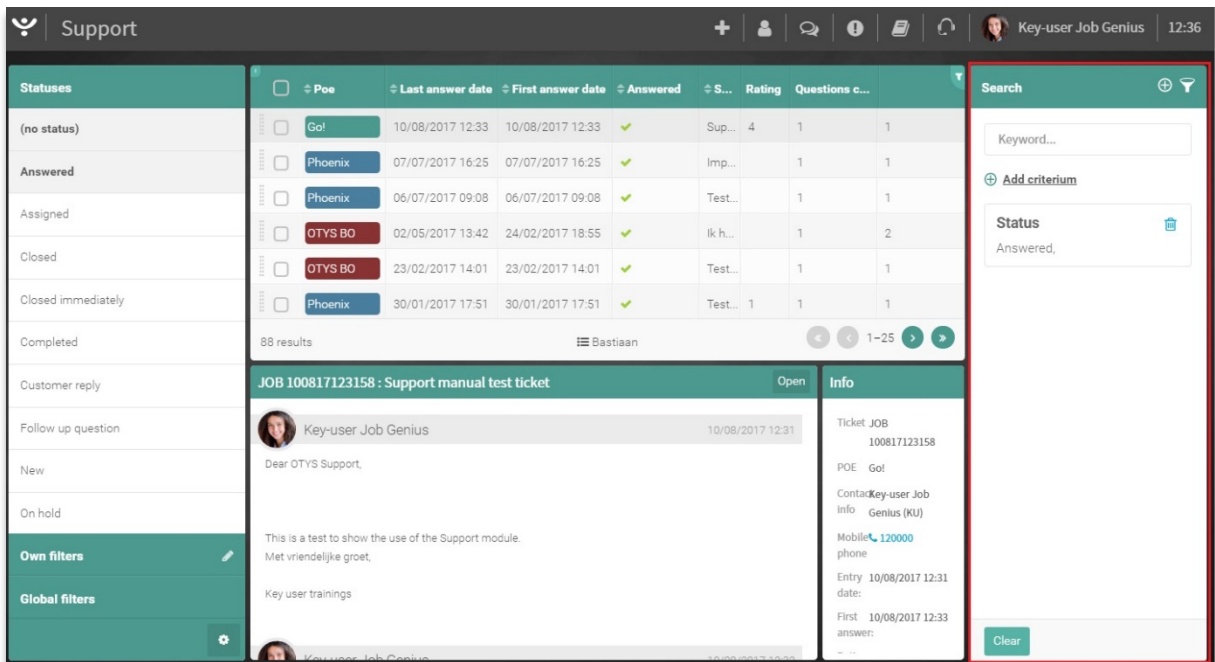
2.6   SEARCH PANEL (RIGHT PANEL)

Fig. 9 - Search panel

2.6.1 INTRODUCTION

This panel can be used to filter. You can search for certain criteria or create filters. You can also check the filter that is used.

2.6.2 USAGE

At the top is the keyword field. For a quick search you can enter a word here and the search will immediately start. The search results are immediate displayed in the list on the left.

Below you see 'Add criterium'. Here you can add an additional criterium for filtering. Next to this button is an orange button with an X, to delete all active filters.
Below it you may see an active search filter. You can identify it by the criterium + value with a red cross behind it.

How to quick search
To search quickly, you can enter a keyword directly in the keyword field. Filtering starts immediately.

How to conduct an advanced search
To search with more than one keyword, you can add criteria to the filter:

1. To conduct an advanced search, click on 'Add criterium'.
2. An overview of the search fields will appear.
    If needed, you can enter the first few letters of a field at 'Filter by name'.

3. Click on one of the fields.
4. Now enter the data in the field. What you can enter depends on the selected field. A date selection is displayed in front of 'Date of entry'. A drop-down menu is displayed in front of 'Module'.
5. Click 'Return' twice after selecting a field.
6. The filter will automatically be applied. You can see which filter is active by looking below the 'Add criterium' button.
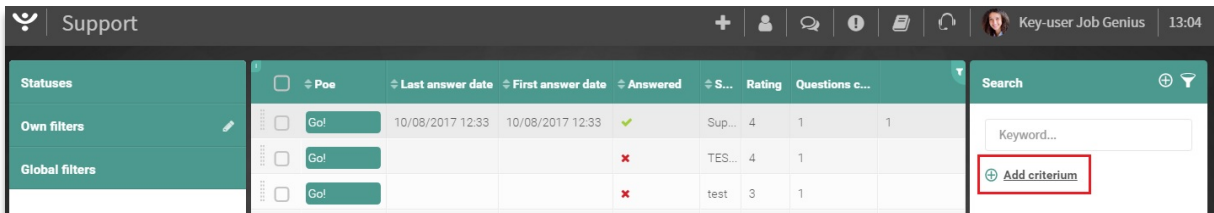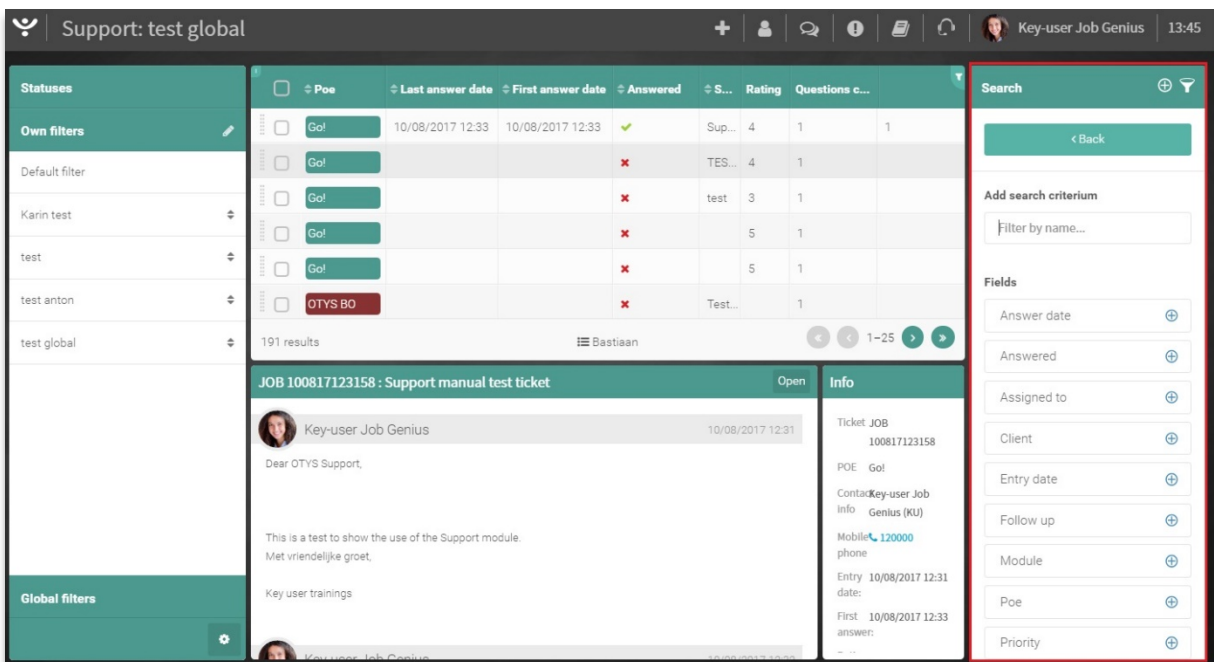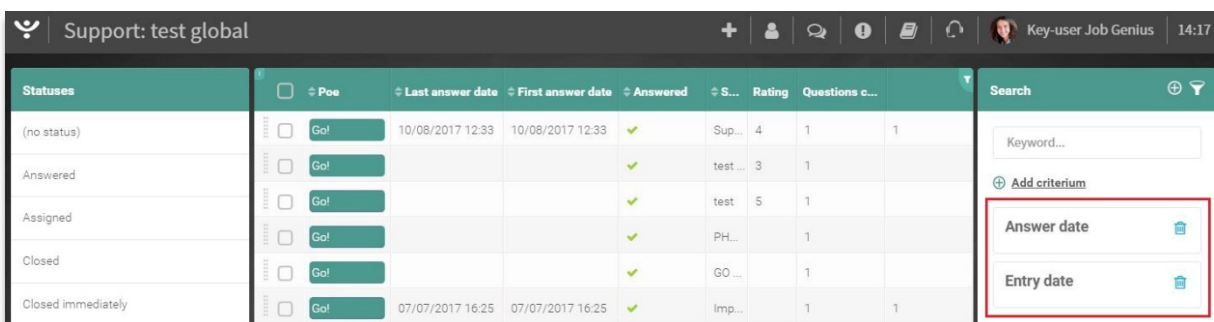

Fig. 10 - Add criterium

Fig. 11 - Criteria fields

Fig. 12 - Active filters

2.6.3 CONFIGURATION

If you want to search frequently with certain search filters, you can choose to save the filter. You can then always select the filter from the left panel.

1. While a filter is active, press the circle with the plus sign at the top
2. Then enter the name you want to give to the filter
3. If you want your colleagues to also be able to use this filter, tick 'Global'
4. You will see the filter appear in the left panel under 'Personal Filters'
5. If you tick 'Global', your colleagues will see the filter appear under 'Global Filters'
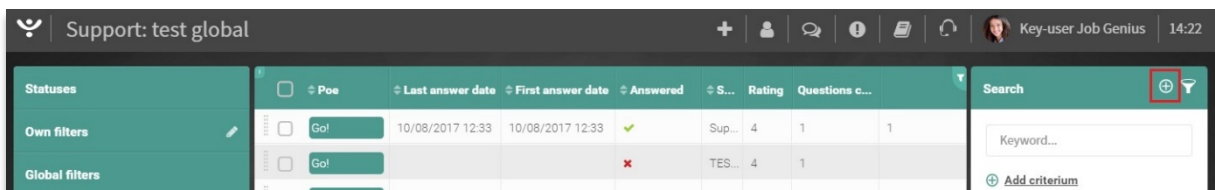
Fig. 13 - Create filter

3 | CREATE TICKETS

3.1 NEW TICKET

To create a new ticket. Click the plus sign at the top

Fig. 14 - Create new ticket

A screen will open in which you can create the ticket.
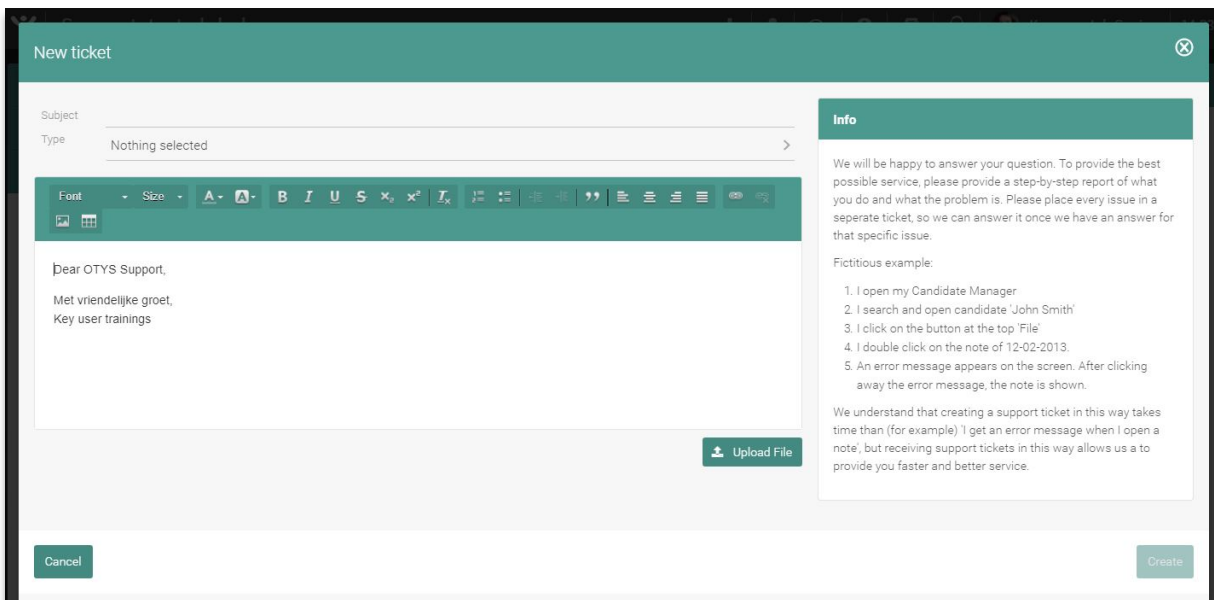
Fig. 15 - Create new ticket

1. Enter the subject. Make it brief and to the point. In this way, support can clearly and quickly assess the ticket.
2. Describe the type of message at 'Type'.
   Use 'bug' when something is not working properly (any more), use 'complaint' for a complaint, 'suggestion' for a suggestion, and 'question' if you want to ask something.
3. Enter the description in the text box. Be clear and concise! Indicate the steps you have taken in arriving at the problem, what the expectation was, and what the outcome was. The more specific and clearer the ticket, the faster we can solve it for you. Screenshots and examples are always welcome. When you have a file that you want to send with the ticket, do this via the 'Upload file' button. This will open a window where you can select the file on your computer.
4. When everything is completed and you want to send the ticket, click 'Create'.

3.2 NEW USER

New employees obviously need new accounts. You do not need to do this. You can apply for this through the Support module, and we will create the account for you.

To request a new user, you must complete the following steps:

1. Click on the figure at the top (next to the plus sign to create a new ticket).
2. A screen in which you can enter the details will appear. There are two tabs: 'Personal information' for personal information, and 'Modules' where you can specify access to various modules.
3. Most questions on the first tab do not require clarification. However, there are some things to look out for.
   - The questions marked with an asterisk (*) are required fields
   - When you enter an email address at 'Forward', all emails will be forwarded to that address.
   - You can enter extra email addresses at 'Extra email aliases'.
4. Once all the information is entered, click on the 'Modules' tab
   An overview of all modules that you can request for the new account will appear. To request a module, simply tick the module.
5. If everything is completed, press the 'Create' button to request the user.

Fig. 16 - Request new user

Fig. 17 - Enter personal information

Fig. 18 - Select modules

Disclaimer: You will only see the modules that can be assigned; it may be that this differs from the image.

4 | CONSULT TICKETS

4.1 OPEN TICKETS

If you have additional information, can answer a question from support, or have your own question, you can always respond to the ticket. This can be done in a number of ways.

4.2 RESPOND TO TICKETS

If you have additional information, can answer a question from support, or have your own question, you can always respond to the ticket. This can be done in a number of ways.

- In the Support module you can right-click a ticket, without opening it. You can then choose 'Reply'. This approach is intended to give a quick answer. You can only enter text. But if you, for example, want to add an attachment, or apply text formatting, you should use the following method.
- To give a comprehensive answer you open the ticket. In an open ticket, you can click 'Reply' in the top right corner. Enter your answer in the text box. To add an attachment, press 'Upload file'. You can browse for an attachment on your own computer and add it. Once the answer is entered, click 'Reply' to send it.
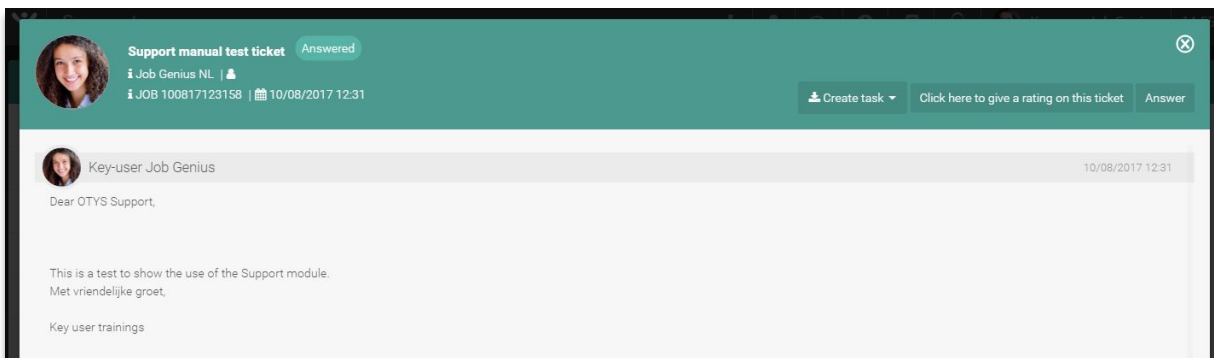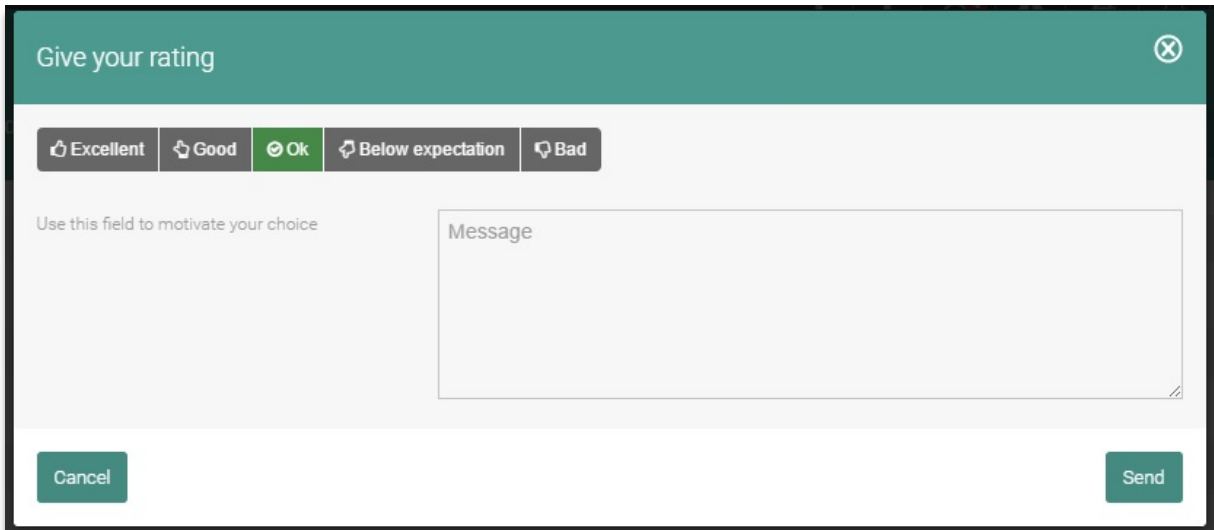

Fig. 19 - Respond to ticket

4.3 ASSESS TICKETS

You can also make an assessment of a ticket. To do this, click the 'Click here to give a rating on this ticket' button in the top right corner of the ticket.

You can give a rating on a scale of 1 to 5. You can also enter a Comment/suggestion.

Fig. 20 - Assess ticket