Help Center

Enterprise Service Management

Ticketing Module User Guide

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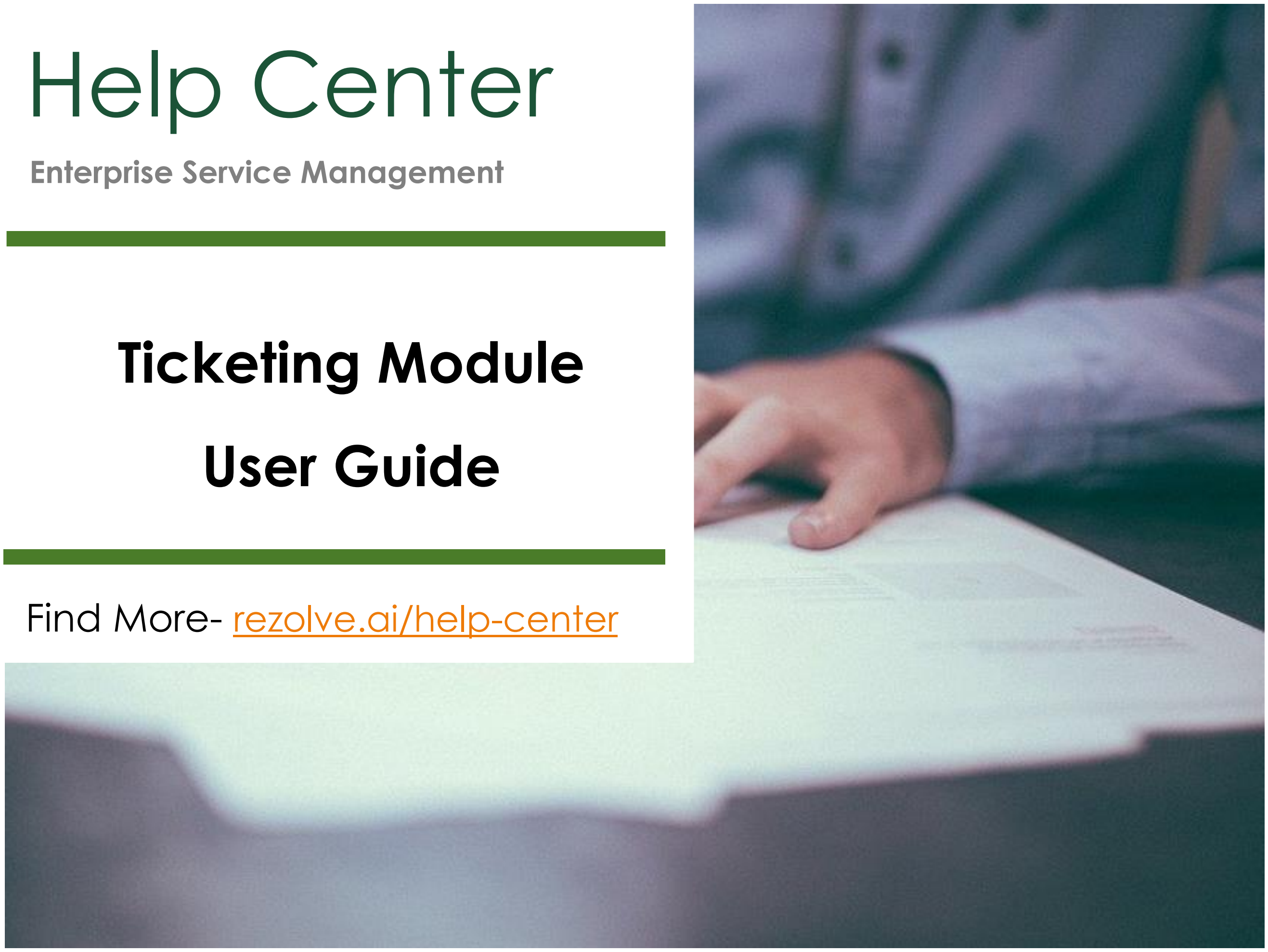


Contents

GETTING STARTED

Welcome to your Admin Portal!!! In this manual we will look at the various sections of the Admin Portal, what they are and how to use them.

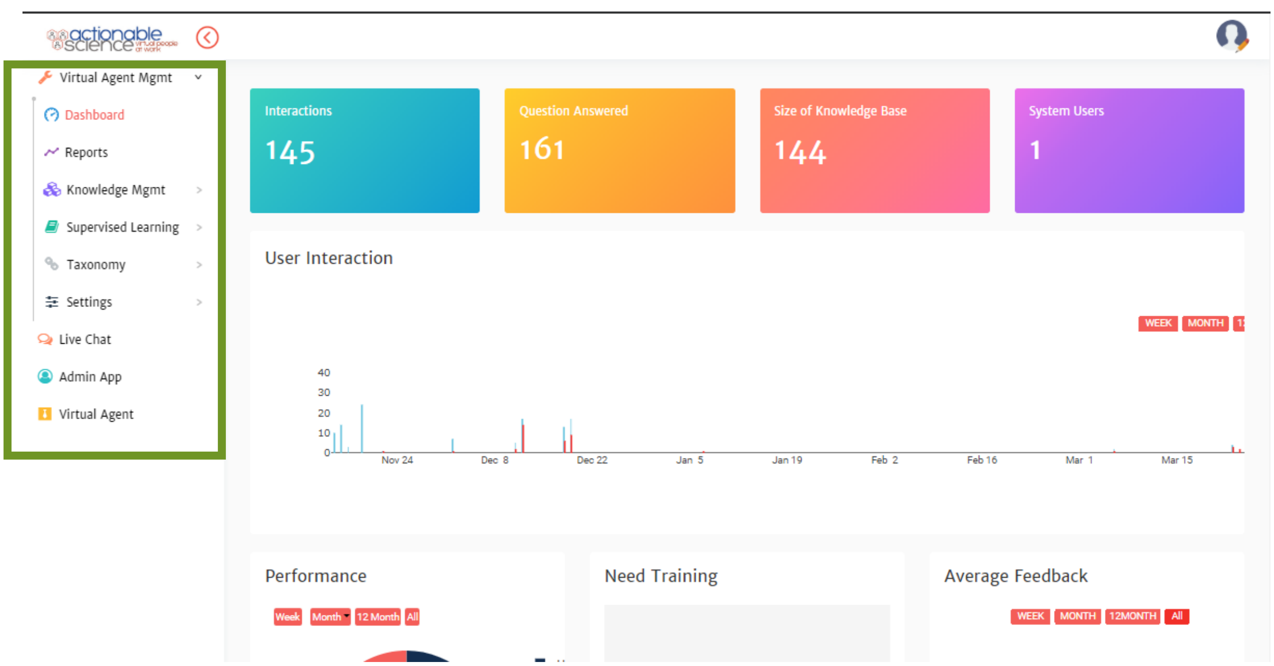
After logging in you are automatically taken to the Dashboard. We will have a more detailed look at this shortly.

On the left of the screen is the Navigation Pane. You will use this to move around the portal. In this manual, we will go over the various sections and how to use them.

Navigation Pane

The Navigation menu can be always be found on the left side of your screen except when using the Virtual Agent section.

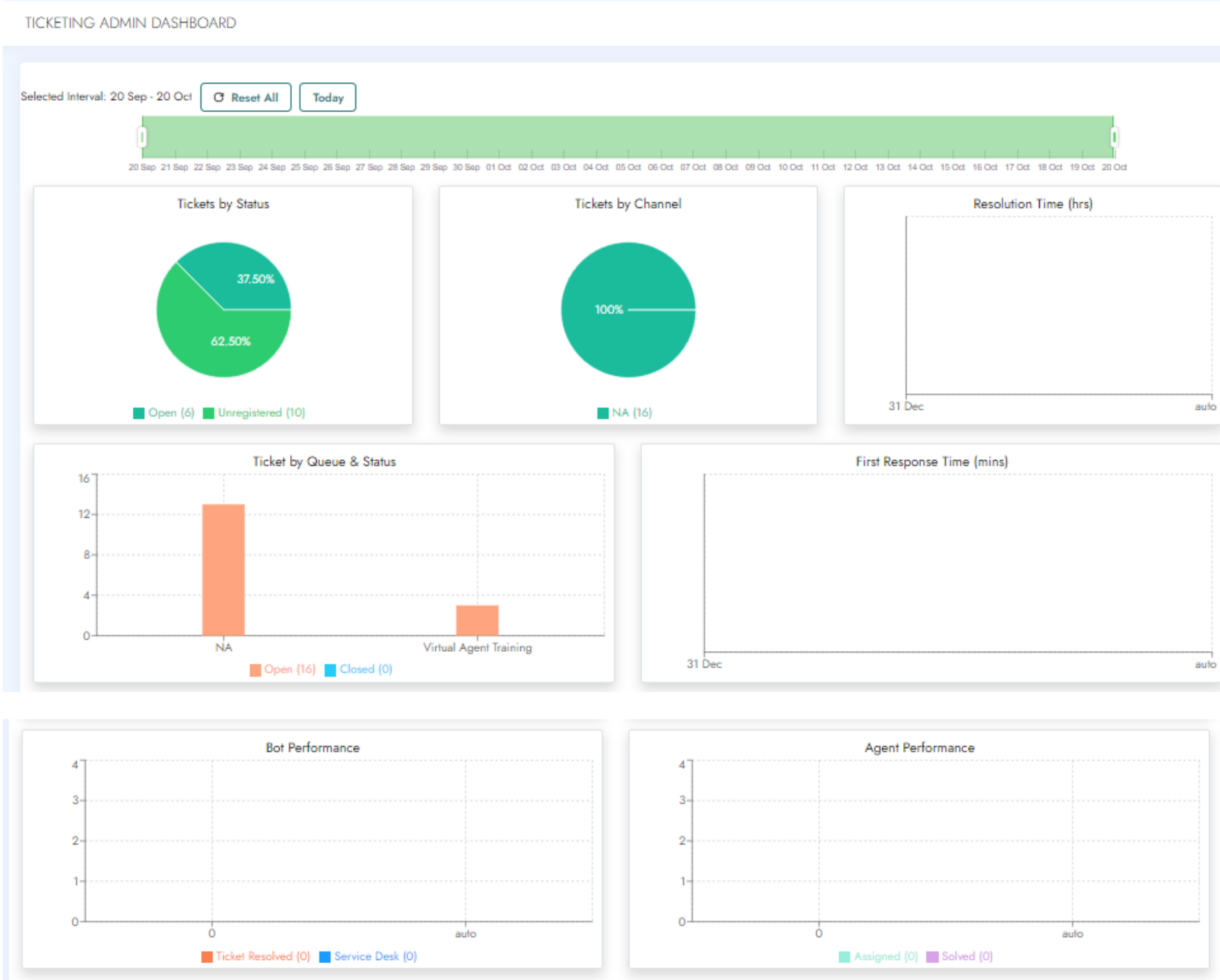
What you are able to see in the navigation pane depends on what roles you have been given in the Admin Portal.



1. ***Virtual Agent Mgmt*** is where you will manage the bot. It includes the Dashboard, Reports, Knowledge Mgmt, Supervised Learning, Taxonomy, and Settings.
2. ***Ticket Mgmt*** is used to manage the Ticketing system. It includes My Tickets (ticket landing page with SLA dashboard) and Ticket Settings.
3. ***Live Chat*** is used to manage the Live Chat. It includes My Chats (Dashboard for chat section), Live Chat Settings, and Review Chat.
4. ***Admin App*** is used to manage users and attributes for restricting their usage. It includes the User Management and Attribute modules.
5. ***Virtual Agent*** is where you can test the bot.

Dashboard

On the Dashboard, you can find some basic information on the ticket performance:



You have an overview on:

- Tickets by Status
- Tickets by Channel
- Resolution time
- Tickets by Queue & Status
- First Response Time
- Bot Performance
- Agent Performance

TICKET MGMT

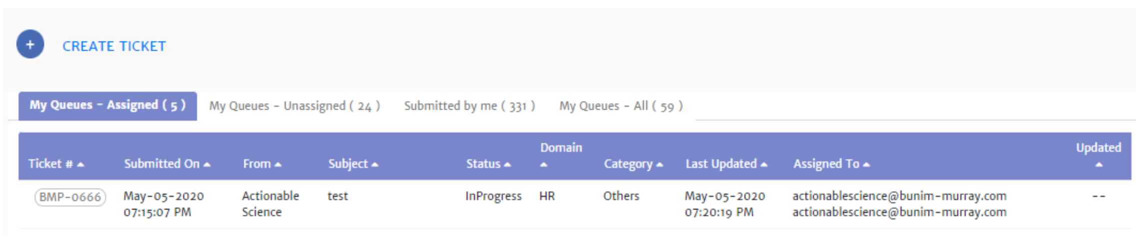
This is used to :

1. Manage all tickets that are created in the system by end-users from the Virtual Assistant. Option to access this feature is **My Tickets**.

2. Manage all tickets that Support Teams (IT, HR, Facilities) will create from ticket portal provided by Actionable Science. Option to access this feature is **My Tickets**.

3. Manage user queues – This is used to manage the queues for different domains, add/remove users from this screen. Option to access this feature is **User Queue**.

4. Manage Settings: Includes managing of support email (the email address from which ticket creation notifications are sent to end-user), default email cc (the email address to which a copy of ticket creation notification is sent) for Support teams, ticketingAdminUSer (the name of a user who manages the user queues. Option to access this feature is **Setting.**



Ticketing Related Roles

Ticket Agent: This is required for a user to be able to access the ticketing module. Once added, the user can see the tickets for the queues to which they are added.

Ticketing Admin: This is required for a user to be able to manage user queues (add/remove users from the queue).

Ticket Agent Supervisor: This is required to a user who will be monitoring queues.

Ticket User: This is required for end-users to be able to view the tickets submitted by them.

Note: If someone is a Ticket Agent, they should not be assigned the Ticket User role.

Setting up users and queues in Ticket Mgmt

Creating a Ticketing Queue

Access level needed

- ✓ Ticketing Admin

Prerequisite

- ✓ If you do not need the queue to be available as an option in the bot, you can create the queue.
- ✓ If you do need it to be an option when creating a ticket in the bot, please talk to your Customer Success Manager.

Instructions

1. To create a queue, navigate to **Ticket Mgmt - > Queue.**
2. Click on **Create**
3. Fill in all details as instructed below

- *Queue Name*: Provide the queue with a name.

  Note: This can't be changed later. The Queue would need to be deleted if rename is requested.

- *Description* and *Condition Name*: Provide Description (ex Route to IT) and Condition Name (ex IT_Helpdesk).
- *Condition Syntax*: Remove and input n/a or none. The Rezolve team will update this field for any routing rules. Default queues keep the syntax blank.
- *Rank*: 1 (Default) or 100 (secondary)

  Note: Default queues (the queues that are routed directly by the bot), should be created **ONLY** by the Rezolve team as additional configuration will be required.

- *Supervisor*: Select queue supervisor from drop down list.
- *Queue Type*: Select **Public**
- *Calendar*, *SLA Goals* and *Response SLA Goals*: not required for queue set up but required for SLA settings.
- *Status*: Select **Published**
- *From Email*: Leave blank
- *Agent Config*: Select **Configured**
- *Team*: Select the appropriate Team
- *Client App*: Select **Ticket**
- *Item Type*: Select **Default**

4. Click on **Create**

Create a user queue

In order for you to add agents to a Queue, you must first create a user queue if it isn't avaible already.

Access level needed

✓ Ticketing Admin

Pre-requisite

✓ A queue is already created by the ASC team in their server so that clients can add users to it. Inform the ASC team to create a queue before you can add users / create user queues.
✓ If you have already done so, and do not see the queue listed follow the steps below.

Instructions

1. To create a queue, navigate to **Ticket Mgmt - > User queue.**
2. Click on **Create**
3. Fill in all details as instructed below
   - **Queue Name:** Start typing in the name of the queue that ASC has created on your request as a part or pre-requisite and select the desired one.
   - **User Name:** Adding users who need to be a part of this queue
   - **Status:** Select Published from the dropdown
4. Click on **Create**

Add a new agent/support staff to ticketing module

Access level needed

✓ Ticket Admin

Pre-requisite

✓ User has already access virtual agent once and is available in User Management as a User with role "Ticket agent".

Instructions

1. Elevate user access to be a ticketing agent by adding role **Ticket agent** from **User Management.**
2. Once complete you can follow the steps outlined in Add an agent/support staff to a new or existing ticketing queue

NOTE: To see the changes in access a user must logout and log back in.

Add an agent/support staff to a new or existing ticketing queue

Access level needed

- ✓ Ticketing Admin

Pre-requisite

- ✓ Queues are already created. If not, please follow steps to Create a User queue.
- ✓ The user that needs to be added is already a part of ticketing and has accessed ticketing module at least once and has a role assigned "Ticket agent"

Instructions

1. Click on Queue Name that you want to modify.
2. Under **Username**, start typing in the username that you want to add. The user will come as a suggestion. Select the user.
   NOTE: *If you don't see the user come under the suggestion, then the user is not available in ticketing or has not accessed ticketing at least once, go to* Add a new agent/support staff to ticketing module.
3. Select **Status** as Published from Dropdown.
4. Click on **Update.**

Ticketing Category Hierarchy

By default, the ticketing Category hierarchy is broken into 3 levels in a ticket; Domain, Category and Sub-category. We allow you to rename these levels, add additional levels or add values under each level.

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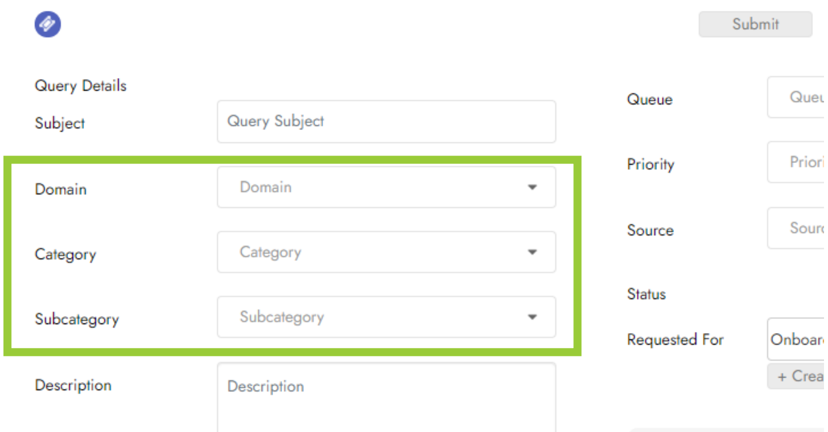


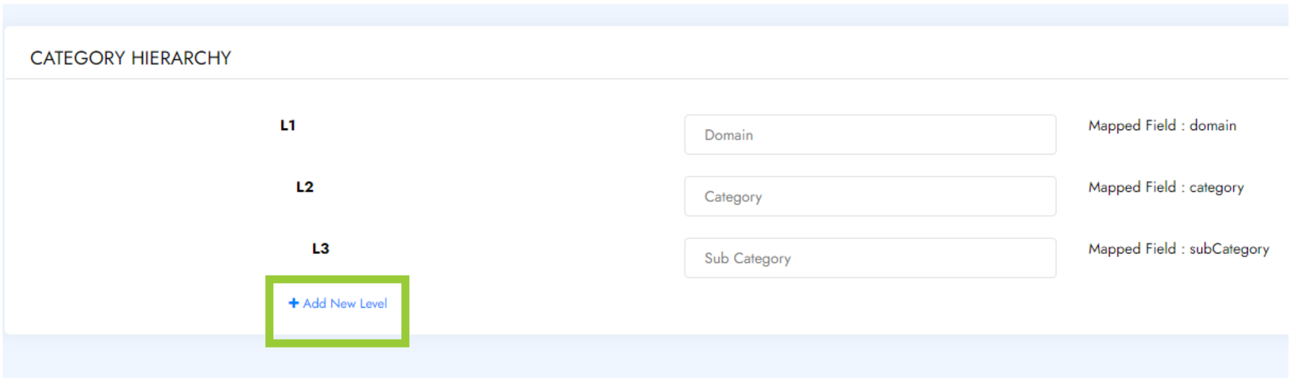
Adding Another Level to Ticketing Category Hierarchy

Access level needed

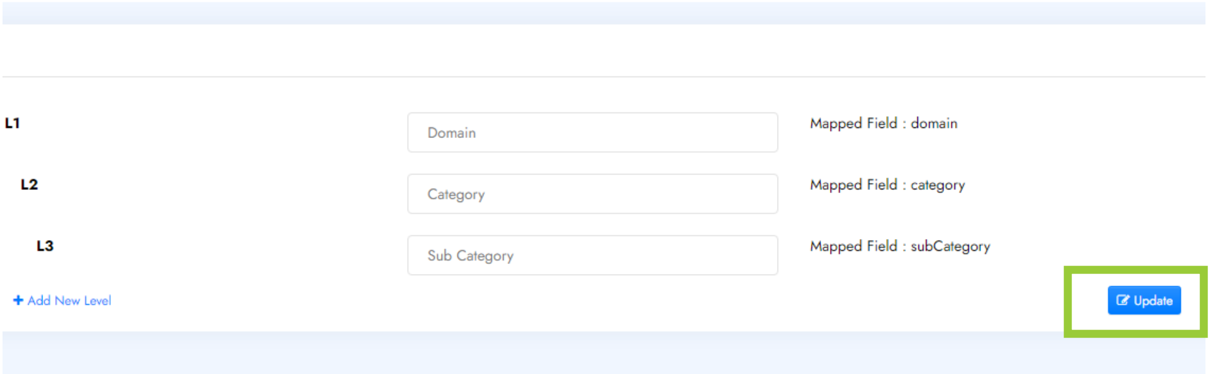
✓ Ticket Admin

Instructions

1. Select **Ticket Management**
2. Select **Settings** from the Ticketing sub-menu
3. Select **Category Hierarchy**
4. Click **'Add new Level'** to add a new level your hierarchy.



5. Type a label for your hierarchy in the box that appears
6. Click '**Update**' button when done



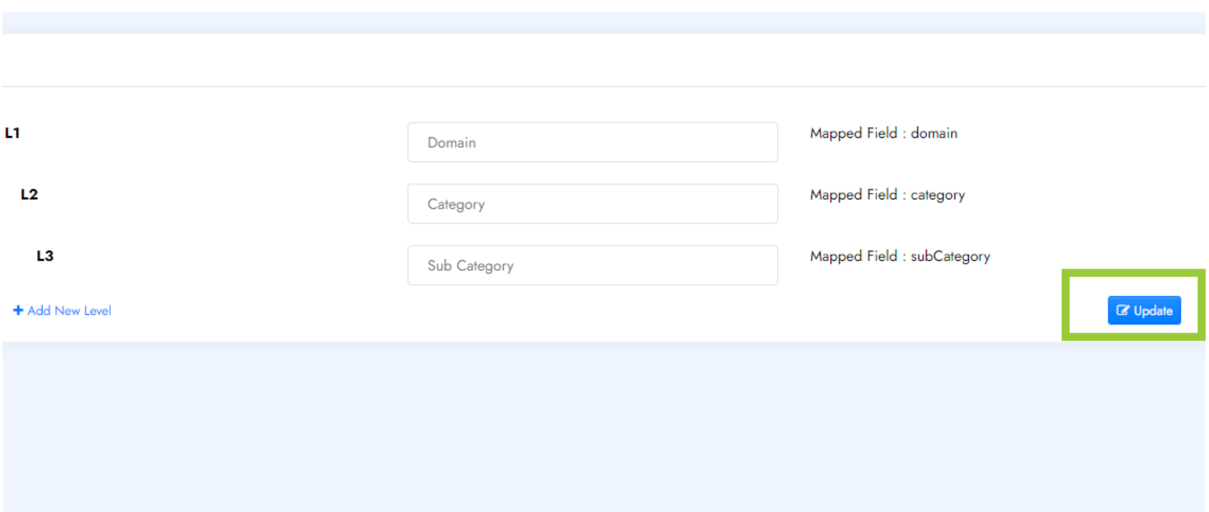
Rename an existing Ticketing Category Hierarchy level

Access level needed

✓ Ticket Agent Supervisor

Instructions

1. Select **Ticket Management**
2. Select **Settings** from the Ticketing sub-menu
3. Select **Category Hierarchy**
4. Find the level you would like to rename and modify it
5. Click '**Update**' button when done



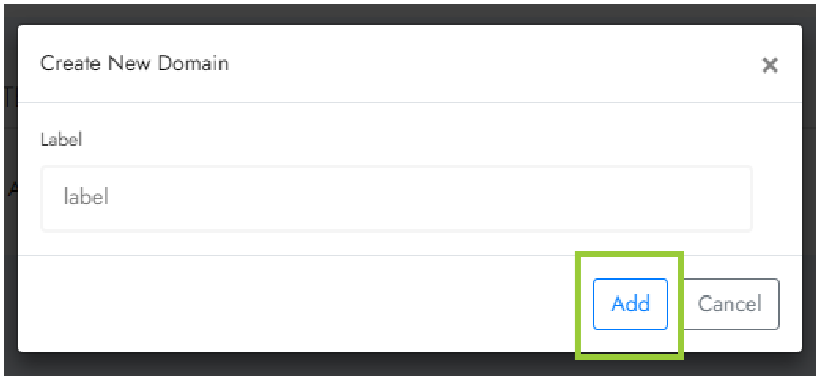
Add a Domain to Ticketing Category Hierarchy level

Access level needed

✓ Ticket Agent Supervisor

Instructions

1. Select **Ticket Management**
2. Select **Settings** from the Ticketing sub-menu
3. Select **Category**
4. Click **+ Add New Domain**
5. Enter the:
   A. New domain in the label box
   B. Click **Add**



Add a Category to the Ticketing Category Hierarchy level

Access level needed

✓ Ticket Agent Supervisor

Instructions

1. Select **Ticket Management**
2. Select **Settings** from the Ticketing sub-menu
3. Select **Category**
4. Click on the Domain you would like to add the category to
5. Click **+ Add Category**
6. Enter the:
   A. New Category in the label box
   B. Click **Add**

Add a Sub-Category to the Ticketing Category Hierarchy level

Access level needed

✓ Ticket Agent Supervisor

Instructions

1. Select **Ticket Management**
2. Select **Settings** from the Ticketing sub-menu
3. Select **Category**
4. Click on the Domain and then the Category you wold like to add the sub-category to
5. Click **+ Add Sub Category**
6. Enter the:
   A. New Sub-category in the label box
   B. Click **Add**

Setting SLA for Queues

Rezolve.ai ticketing system is enabled with SLA calculation and reporting capabilities. With this feature, each queue can now have a Calendar and SLA Goals mapped to it. The Calendar setup includes Business hours, Holidays and Time Zone.

If you do not set up SLA Goals or Calendar, it will remain the default values.

Default Values

Resolution SLA Default Values

- Critical – 1 hour
- High - 4 hours
- Medium - 8 hour
- Low - 24 hours
- Very low - 168 hours

Response SLA Default Values

- Critical and High - 0.5 hours
- Medium - 1 hour
- Low - 4 hours
- Very low - 8 hours

Business Hours Default Value

- Monday to Friday 8 am to 5pm

Holidays Default Values

NAME	DATE
New Years Day	2021-01-01
Juneteenth National Independence Day	2021-06-19
Independence Day	2021-07-04

Veterans Day	2021-11-11
Christmas Day	2021-12-25

Business Hours Configuration

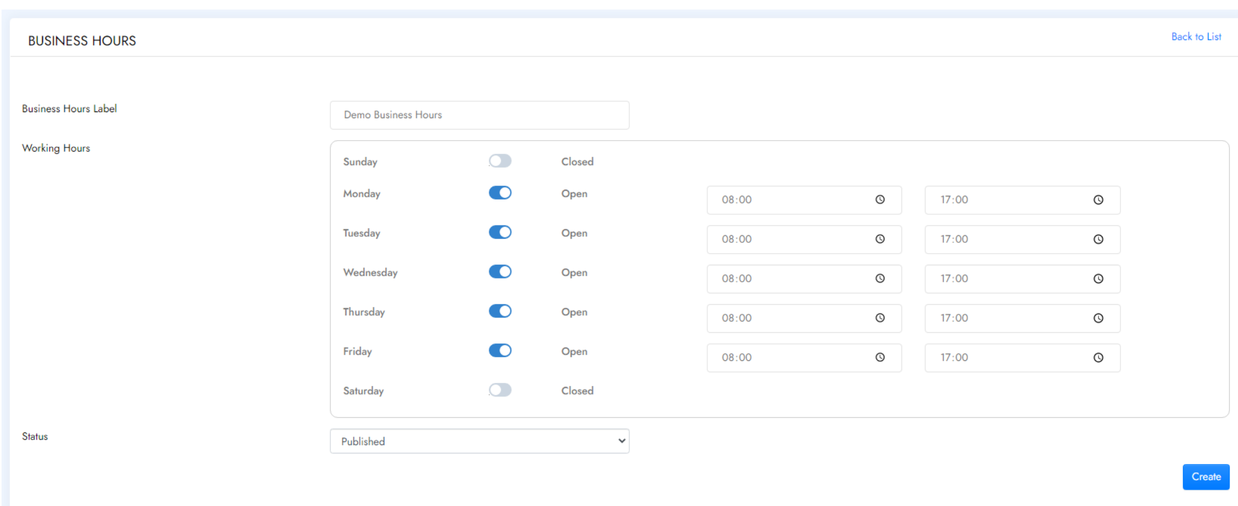
Access level needed

Tenant Admin

Instructions

Tenant Admin can add business hours from Admin App > Global Settings > Business Hours.

This screen is used for configuring the working hours, working days and off days.



Holidays Configuration

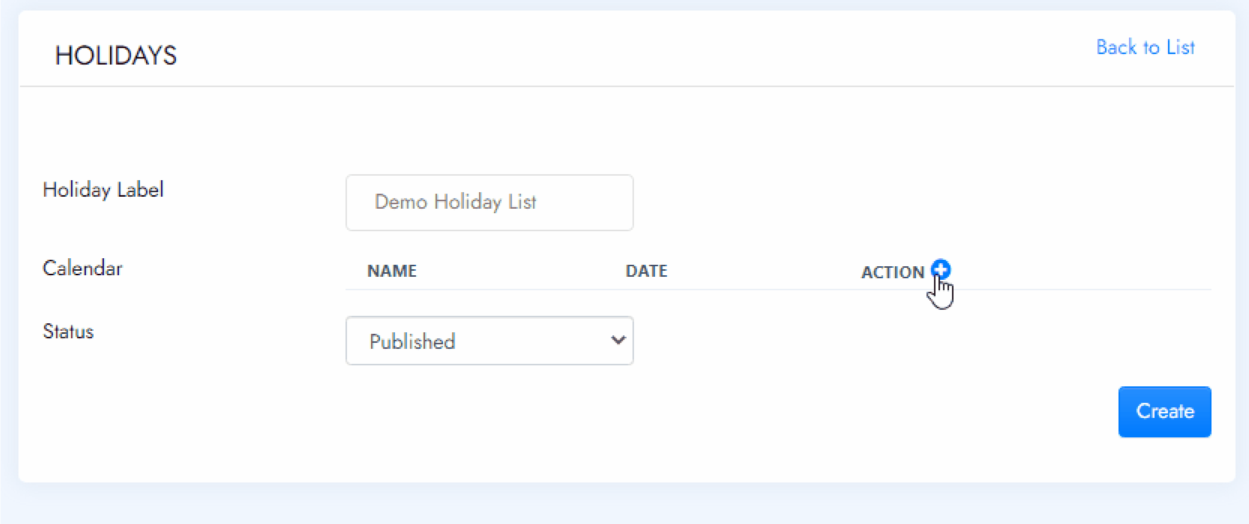
Access level needed

Tenant Admin

Instructions

Tenant Admin can add Holiday list by:

1. Going to Admin App > Global Settings > Holidays
2. Click Create button



3. Click on the 'Plus +' action button to add a new holiday.
4. Type the name of the Holiday and select the date.
5. Click save once you add a holiday.
6. Click 'Create' once you are done adding all your holidays.

Configuring Calendars

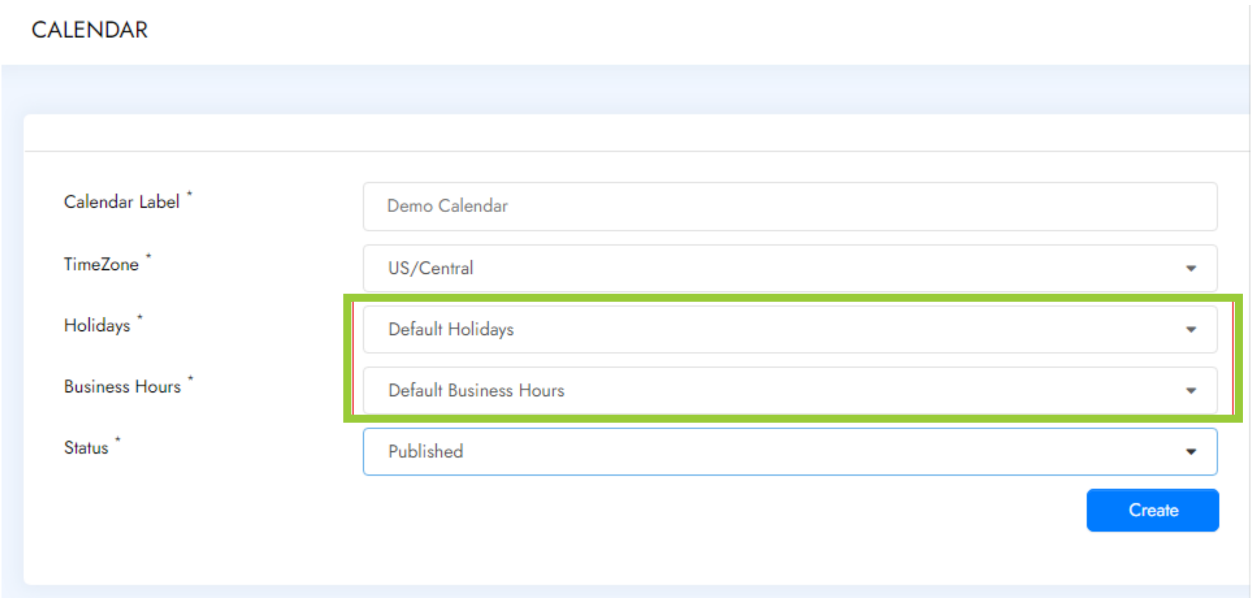
Access level needed

Tenant Admin

Instructions

A calendar is used for defining the availability of a queue. When creating a calendar, the Tenant Admin needs to select the previously created list for business hours and holidays associated with that queue.

1. Go to Admin App > Global Settings > Calendar
2. Now you can add or update a calendar.
   - To configure a calendar, select the Business hours and Holidays list.



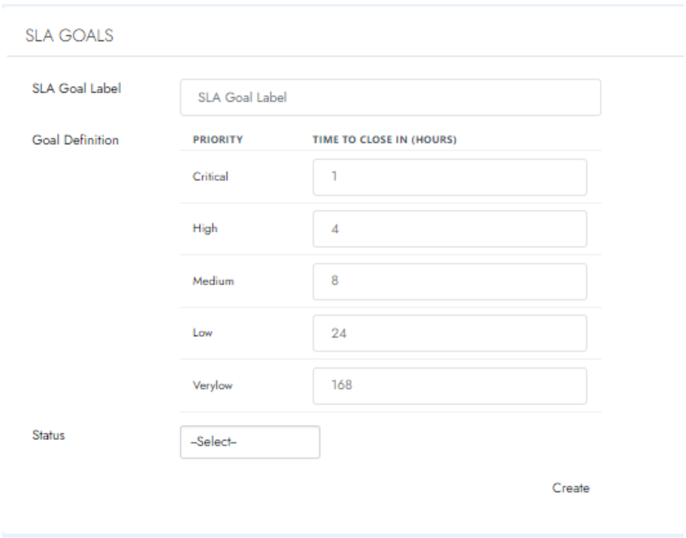
Configuring Resolution SLA Goals

Access level needed

Ticket Admin

Instructions

Currently, Ticket Admin can configure the Ticket Resolution SLA goals for Critical, High, Medium, Low and Very Low priority tickets.



Ticket Admin can create different Resolution SLA goals for different queues. To add SLA goals:

1. Go to Ticket Management > Settings > SLA Goals
2. Enter the SLA goal for that priory in hours
3. Set Status to Published
4. Click **Create**

Default Values

If you do not set up SLA Goals or Calendar, it will use the default values.

- Critical – 1 hour
- High - 4 hours
- Medium - 8 hour
- Low - 24 hours
- Very low - 168 hours

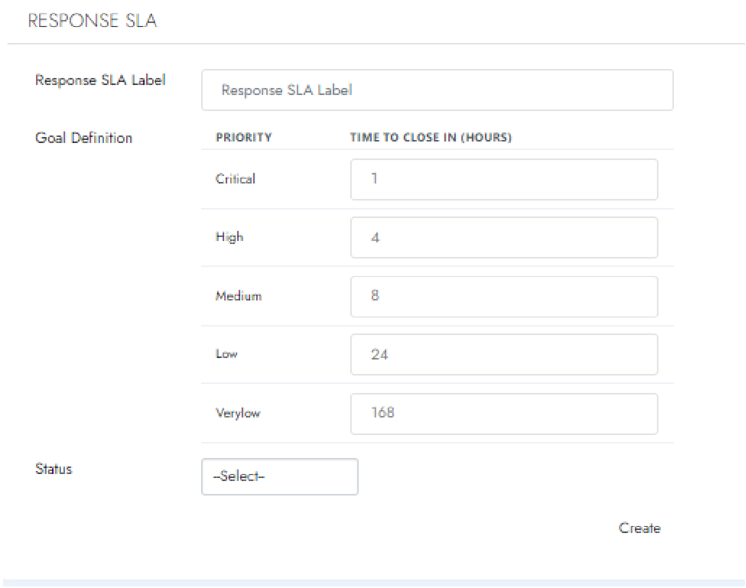
Configuring Response SLA Goals

Access level needed

Ticket Admin

Instructions

Currently, Ticket Admin can configure the Ticket Response SLA goals for Critical, High, Medium, Low and Very Low priority tickets.



Ticket Admin can create different Response SLA goals for different queues. To add SLA goals:

1. Go to Ticket Management > Settings > Response SLA
2. Enter the SLA goal for that priory in hours
3. Set Status to Published
4. Click **Create**

Mapping SLA Goals and Calendar to a Queue

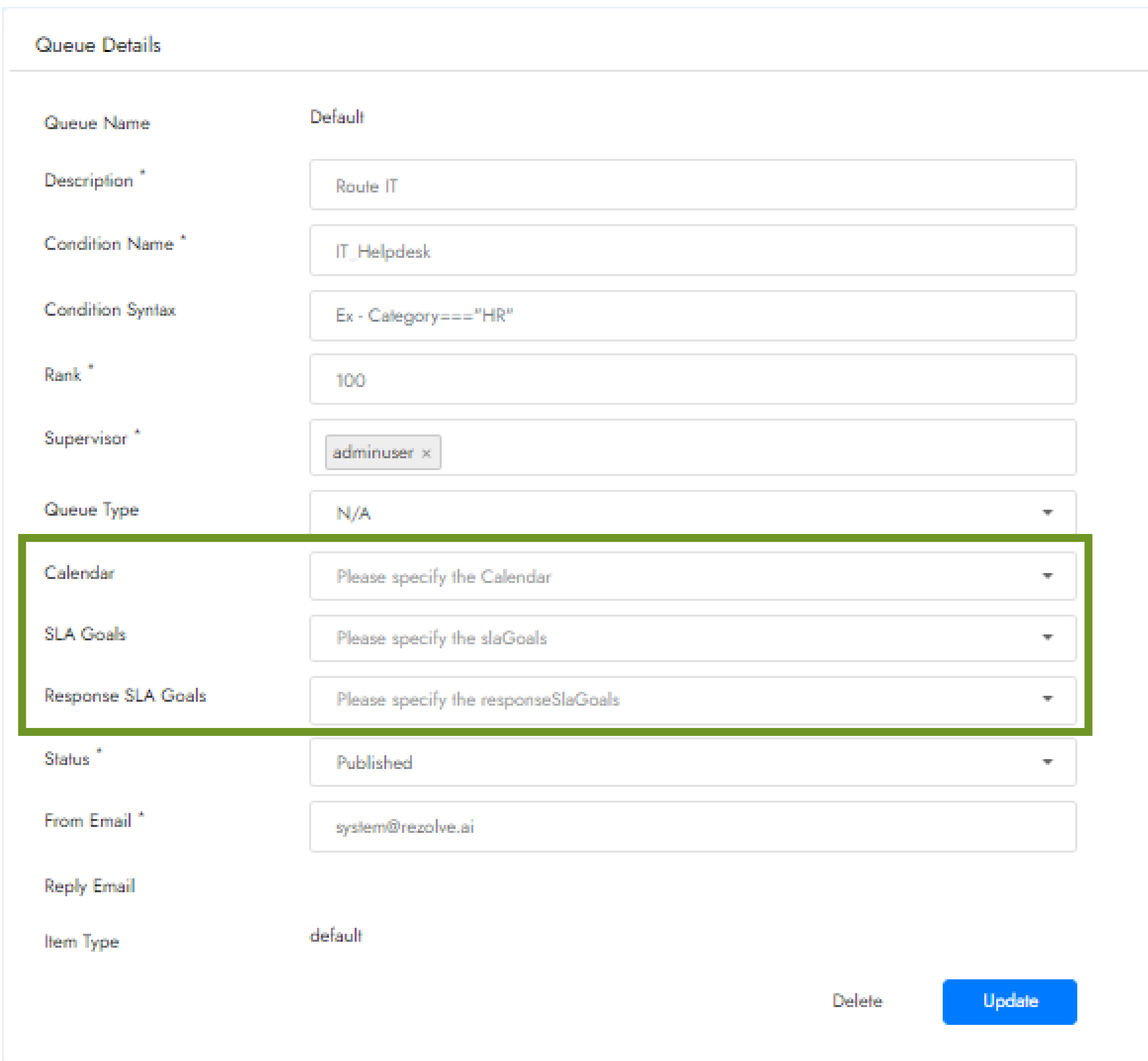
Access level needed

Ticket Admin

Instructions

Once the calendar and SLA goals are configured Ticket Admin can use them while creating a queue.

1. Go to **Ticket Management** > **Queue**
2. Select the queue you would like to associate the SLA to
3. Select the appropriate Calendar from the drop down next to Calendar
4. Select the appropriate Resolution SLA from the drop down next to SLA Goals
5. Select the appropriate Response SLA from the dropdown next to
6. Click **Update**



SLA Reporting

The current 'Ticket Detail Report' is enhanced to give you the SLA Met and Not Met insights.

This report now shows two new columns - Resolution Time (in Minutes) and SLA.

To download this report, navigate to Ticket Management > Reports.

Resolution Time (in Minutes)	SLA
240	Not Met
200	Not Met
20	Met

Note - In case a ticket is still open the Resolution Time shows as 'N/A' and SLA is calculated by considering Resolution time as Current Time.

If you do not set up SLA Goals or Calendar, it will use the default values.

Custom Ticketing Status

In addition to the current default Ticket Status of Submitted, Assigned, In Progress, Resolved, Closed and Re-opened, your company can create your own Ticket Status.

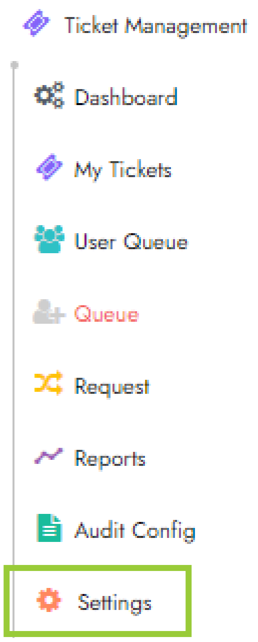
Creating a New Status for Tickets

Access level needed

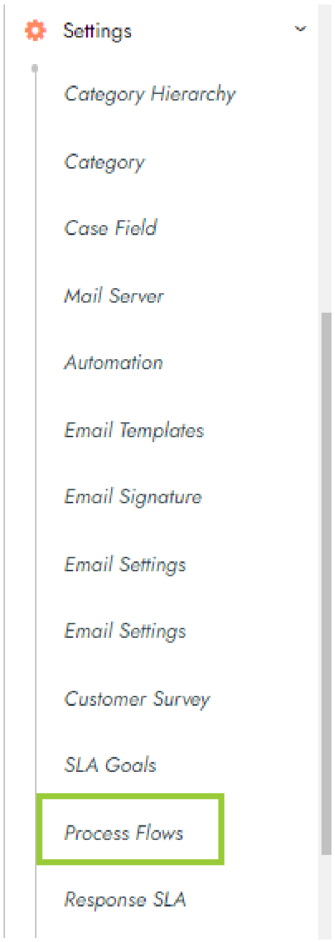
Ticket Admin

Instructions

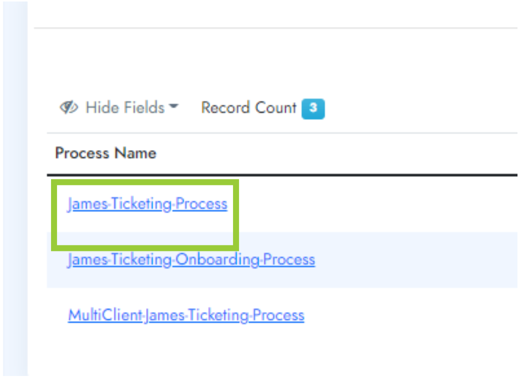
1. Go to **Ticket Mgmt**
2. Click on **Ticket Management** to expand the Ticketing menu
3. Click on **Settings**



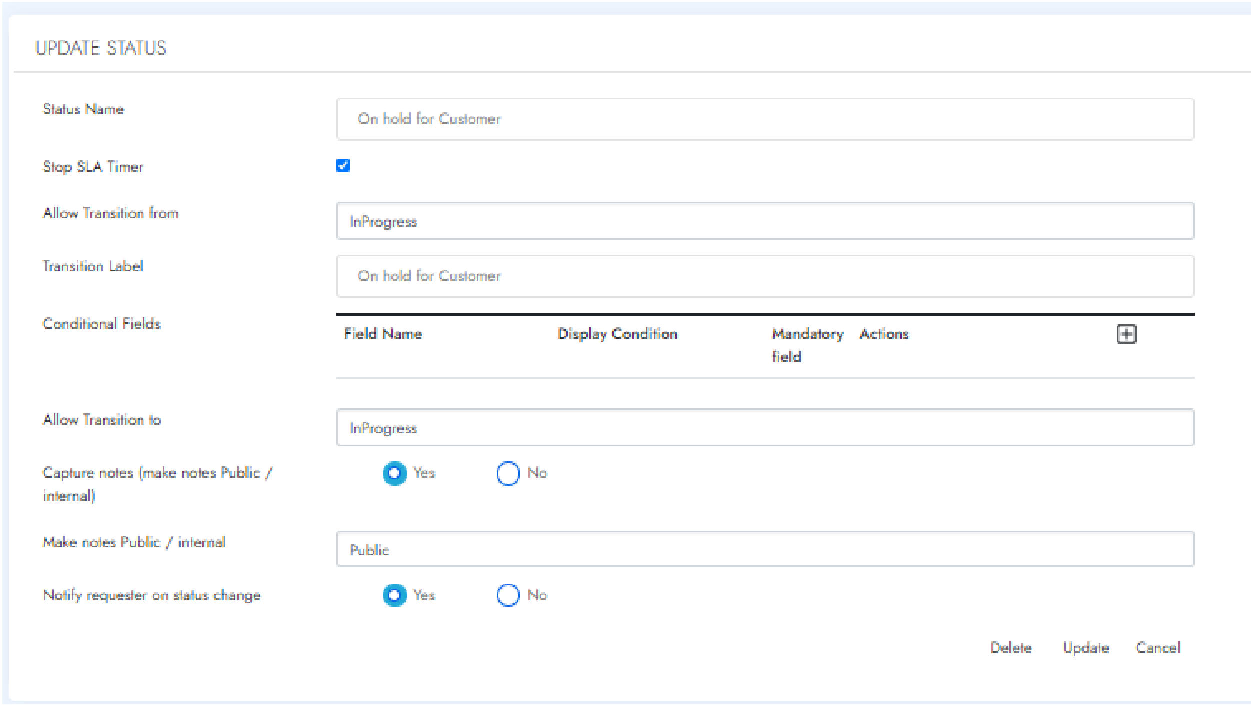
4. From the *Settings* sub-menu select **Process Flows**



5. Now select **James-Ticketing Process**



6. Click **+ Create**
7. Complete the Update Status configuration screen:
   - *Status Name* – Give your status a name
   - *Stop SLA Timer* - If you want the SLA clock to stop running while the ticket is in this status, make sure is checked
   - *Allow Transition from* - Select what status the ticket must be in for the one you are creating to become an option.
   - *Transition Labels* – Give the button for this status a label
   - *Conditional Fields* –
   - *Allow Transition to* - Select what status an agent can transition the currently being created status to when the status is no longer relevant.
   - *Capture notes* – Choose if you want the agent forced to add a note when selecting this status
   - *Make notes Public / Internal* – Choose if that note should be a "Public" or "Internal" note type
   - *Notify requester on status change* – Select if the requester should be notified of the status change



8. Click Save

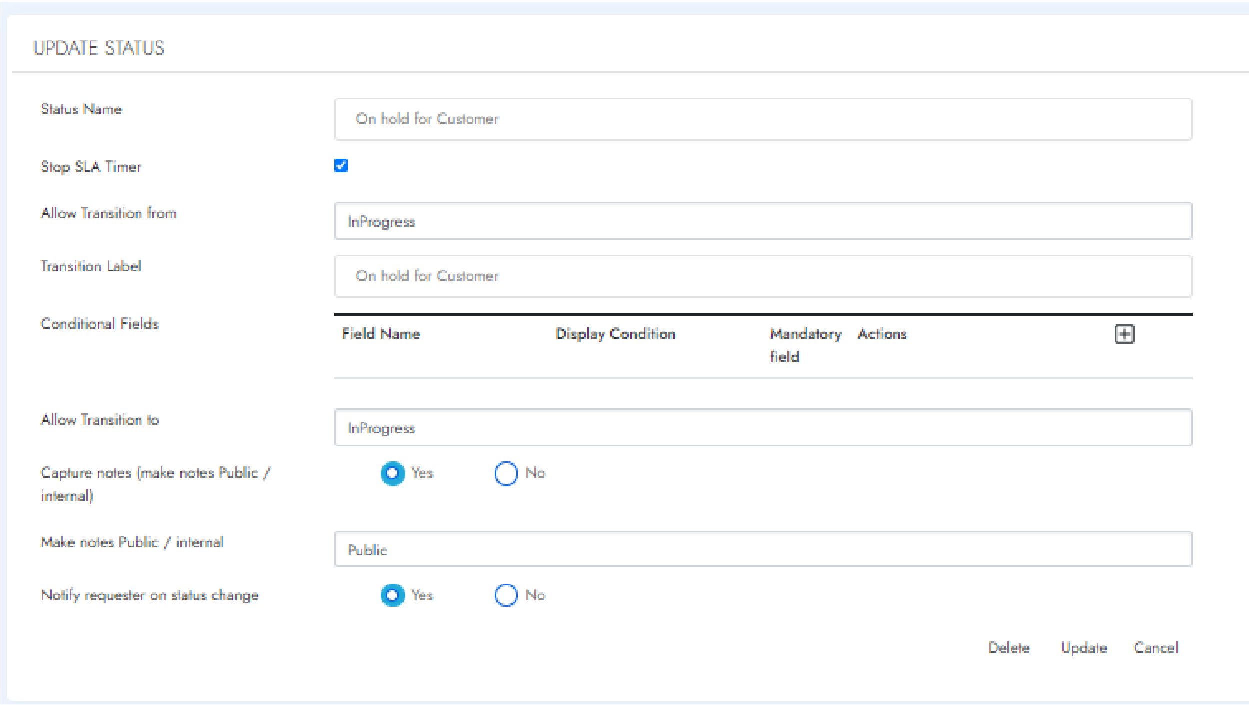
Update Custom Created Status

Access level needed

Ticket Admin

Instructions

1. From the menu on the left select **Ticket Mgmt**
2. Click on **Ticket Management** to expand the Ticketing menu
3. Click on **Settings** > **Process Flows**
4. Now select **James-Ticketing Process**
5. Select the *Status* you want to modify
6. Make your changes
7. Click **Update**



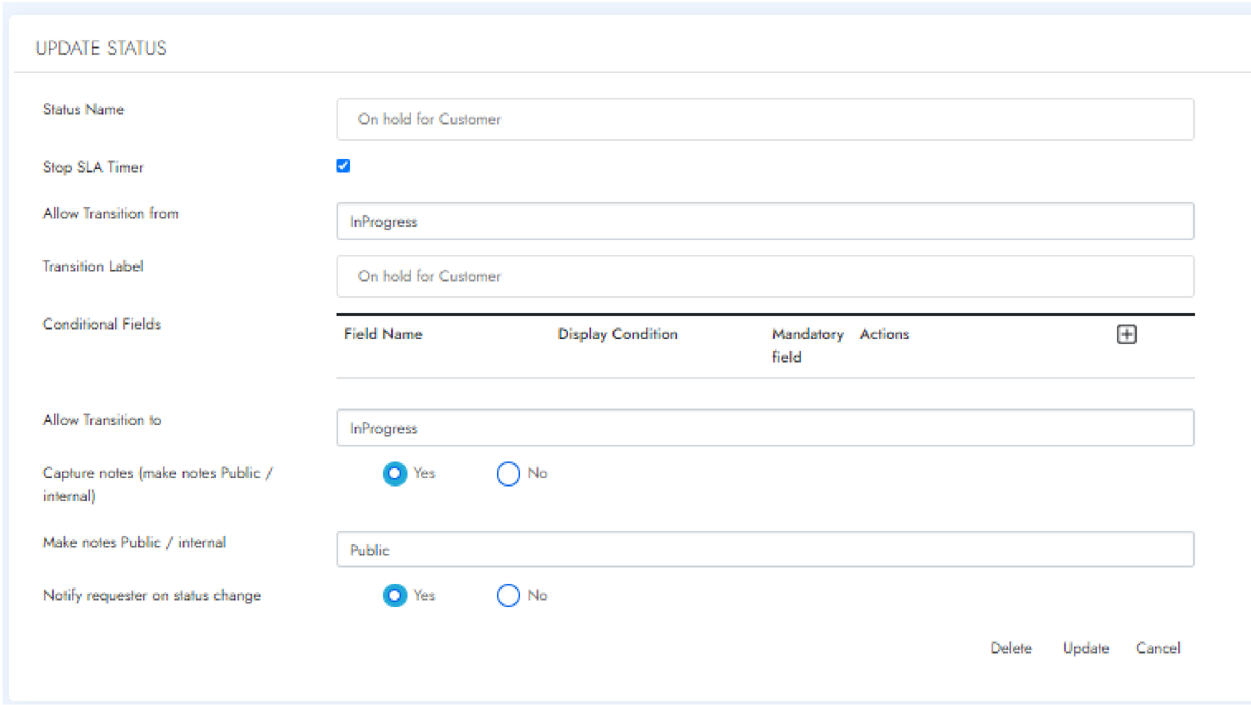
Deleting Custom Created Status

Access level needed

Ticket Admin

Instructions

1. From the menu on the left select **Ticket Mgmt**
2. Click on **Ticket Management** to expand the Ticketing menu
3. Click on **Settings** > **Process Flows**
4. Now select **James-Ticketing Process**
5. Select the *Status* you want to delete
6. Click **Delete**



UPDATE STATUS

Status Name	On hold for Customer
Stop SLA Timer	☑
Allow Transition from	InProgress
Transition Label	On hold for Customer
Conditional Fields	Field Name / Display Condition / Mandatory field / Actions
Allow Transition to	InProgress
Capture notes (make notes Public / internal)	◉ Yes ○ No
Make notes Public / internal	Public
Notify requester on status change	◉ Yes ○ No

Delete Update Cancel

My Tickets

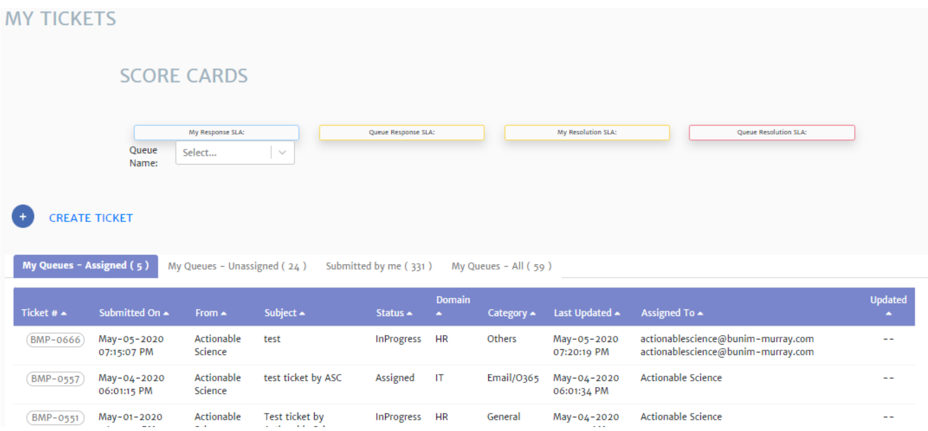
This is the screen where all tickets land up whether created from Use cases designed in Virtual Agents or created by Support Teams. This has 4 tabs that help a support agent to see tickets. Below is a quick know-how of those 4 tabs:

My Queues – Assigned: This has the tickets that are assigned to the logged-in support user for the queue (s) they are a member of. The logged-in user can be a part of a single support queue or multiple support Queues and will see all tickets assigned to them.

My Queues – Unassigned: This has the tickets that are not assigned to any member of the queues for which the logged-in support user is a member of. The logged-in user can be a part of a single support queue or multiple support Queues and will see all tickets not assigned to any member of those queue(s).

Submitted by me: This is available to end-users as the Self Service portal and includes the ticket that is created by them. These also include tickets created by Support teams for themselves or an end-user (applicable for support user only)

My Queues – All: This has all tickets in all states assigned to the queues that the logged-in support user is a member of. This includes all tickets that are in **My Queues – Assigned** and **My Queues – Unassigned** including all closed tickets.



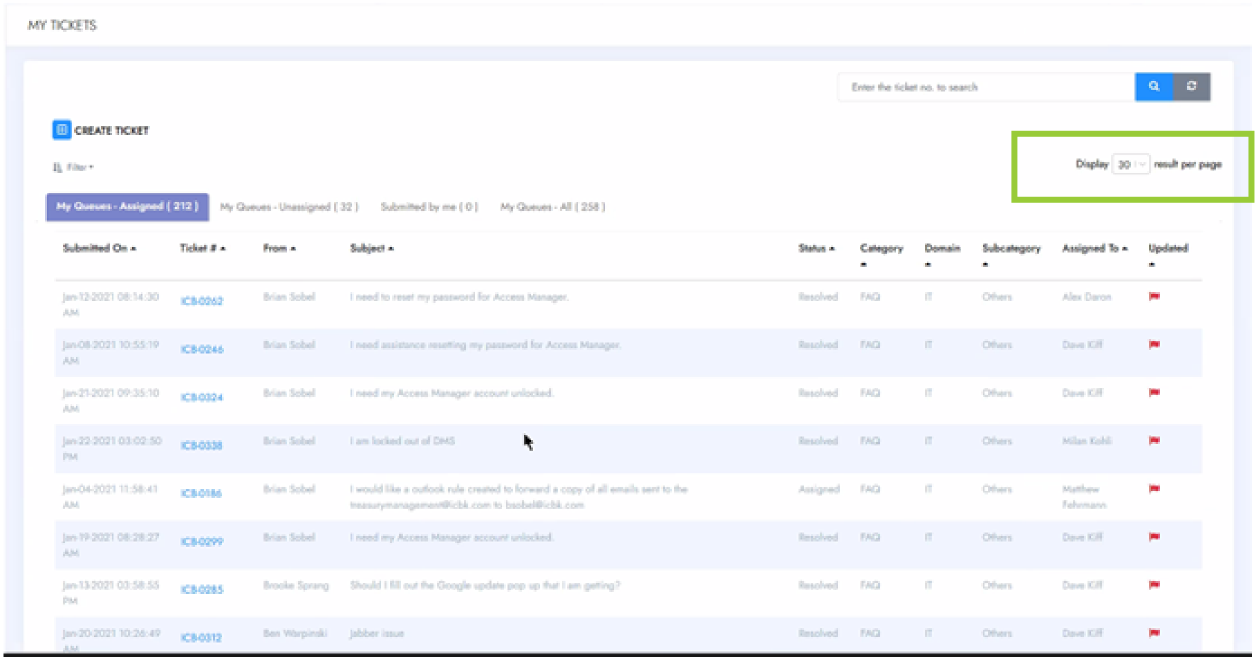
Modify the # of Tickets Displayed per Page on the My Tickets Page

Agents have the ability to choose how many tickets to display per page.

1. Click on **Ticket Management**
2. Select "**My tickets**"

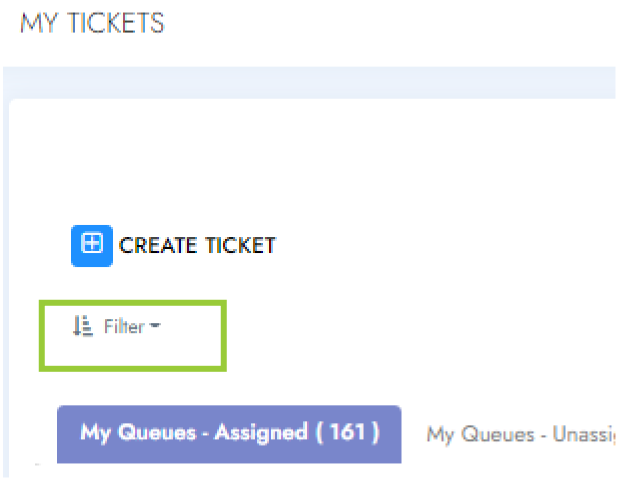
3. Select the tab you want to view
4. Select the Display dropdown
5. Select the # of how many tickets you would like to display

Please Note: The value you select will reflect on all My Ticket tabs.

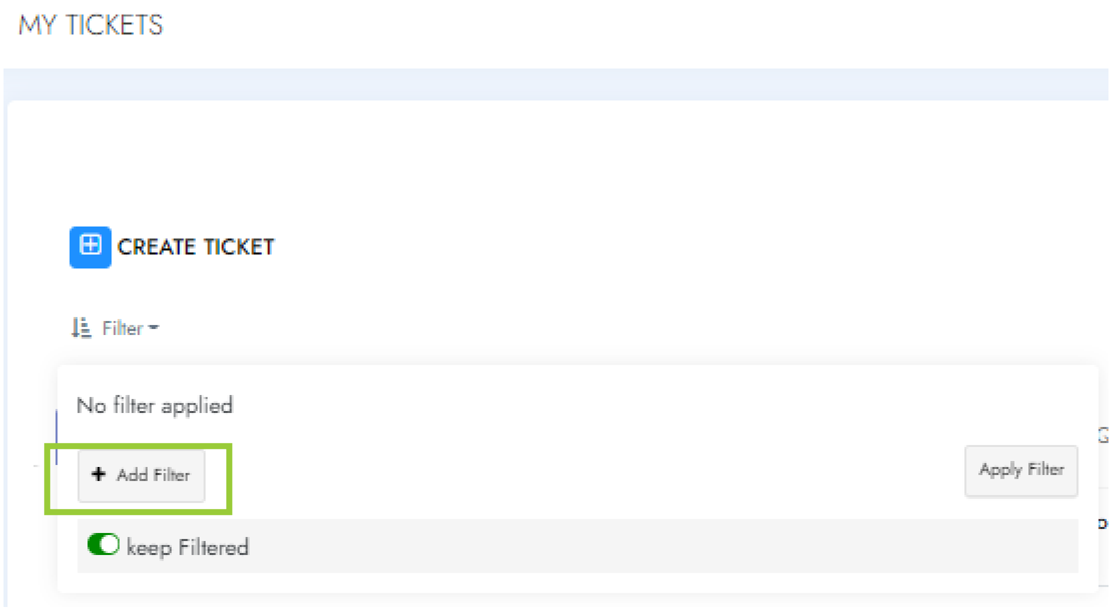


Using Filters

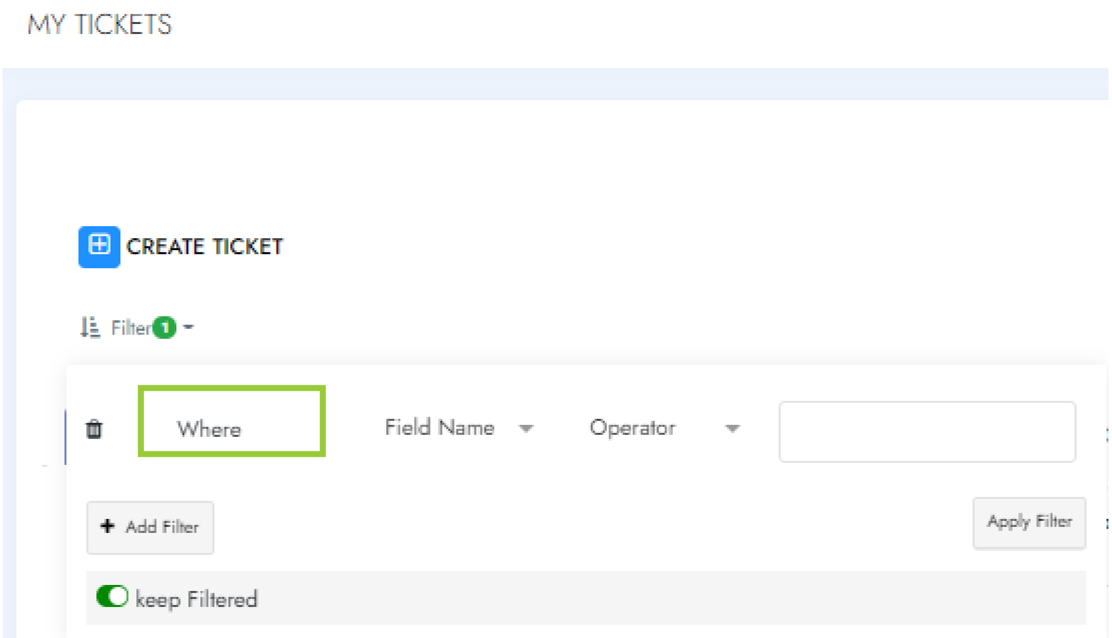
1. Click on **Ticket Management**
2. Select **My ticket**
3. Click **Filter**



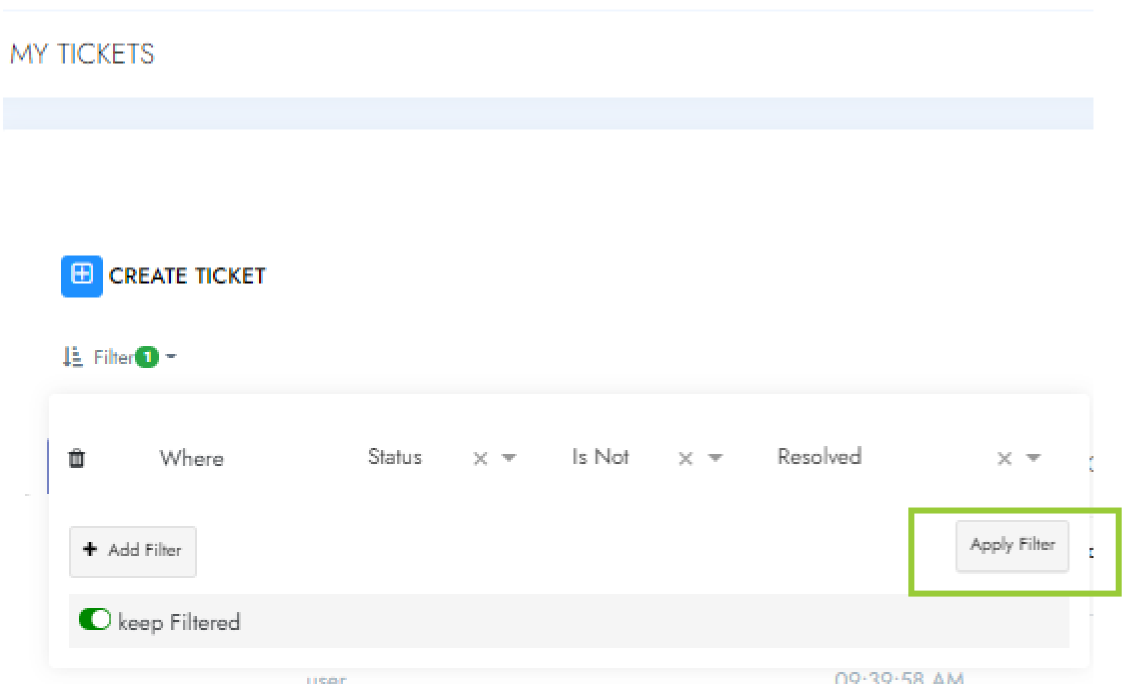
4. Click on **+ Add Filter**



5. Select which *Field* you would like to use as a Filter

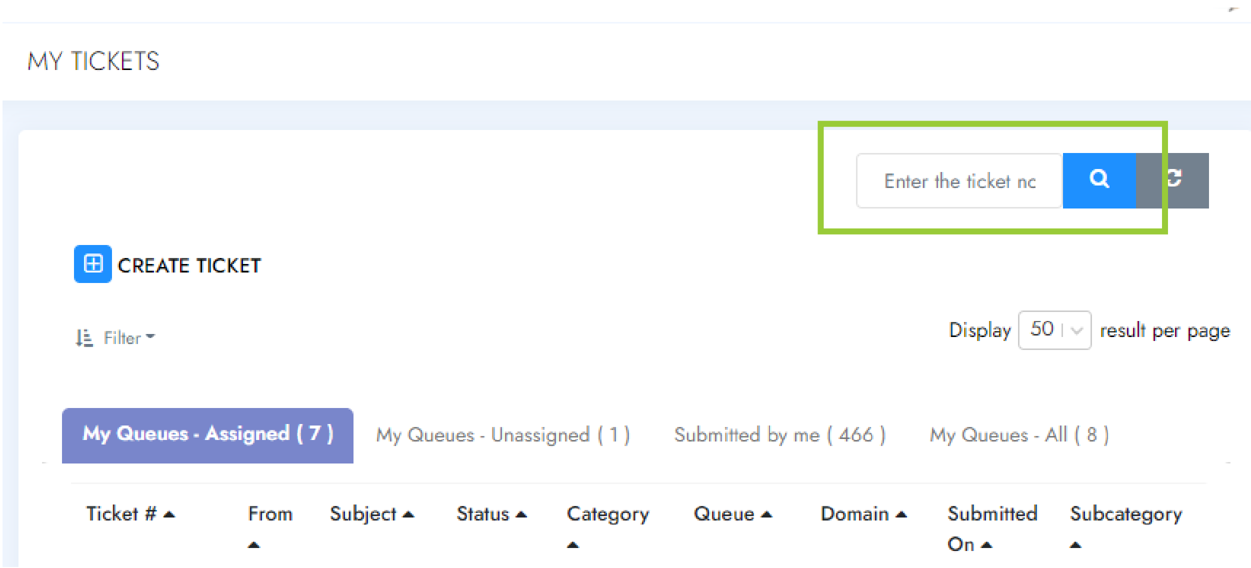


6. Select an *Operator* (Is, Contains or Is Not)
7. Enter the value that you would like to filter against (Depending on the field this might be a dropdown.)
8. Click **Apply Filter**



Search for a ticket

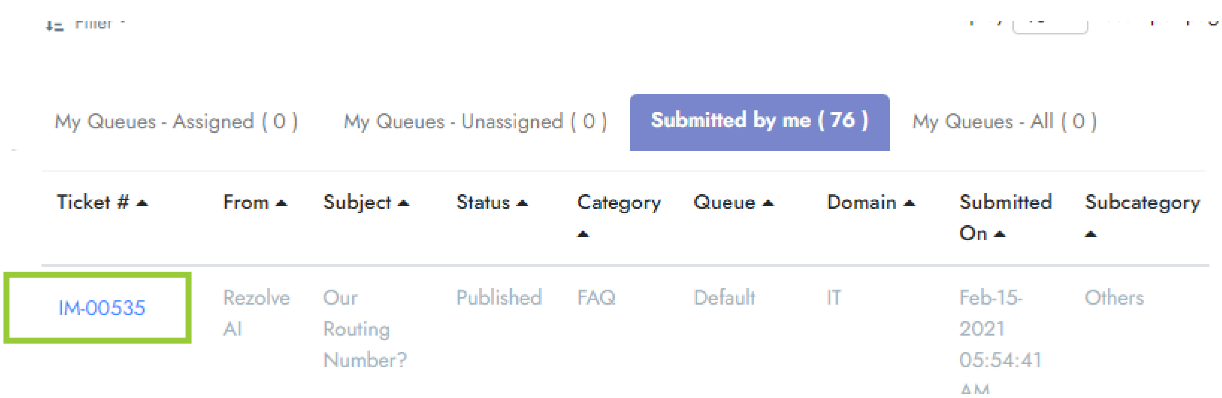
1. Click on **Ticket Management**
2. Select **My ticket**
3. Type the ticket number in the search box (found top right)



4. Press Enter or click on the magnifying glass next to ticket number
5. The ticket will show in the relevant tab

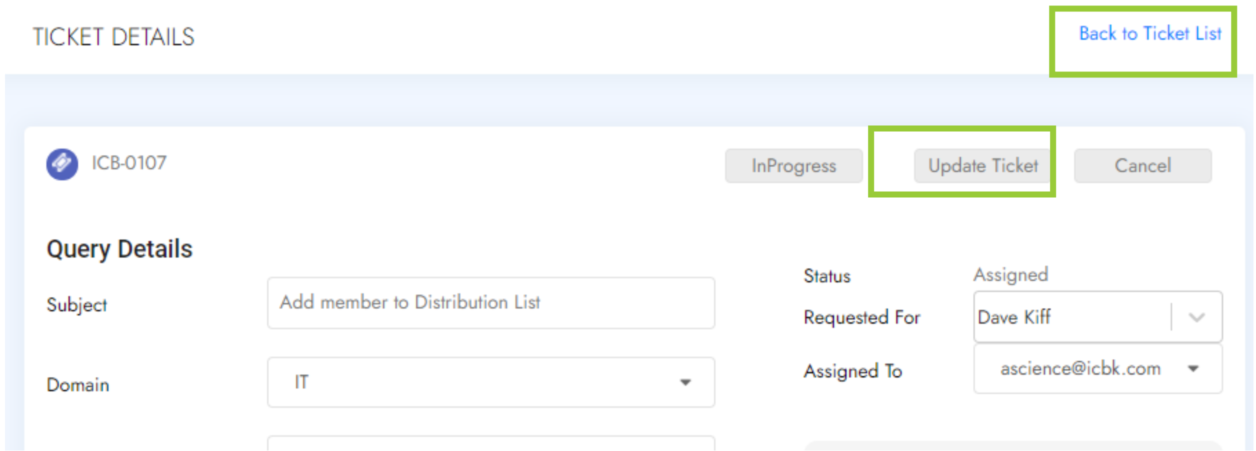
Please Note: All tickets will show in *My Queue – All tab*. Unless the ticket is assigned to you or submitted by you the other tabs will be empty.

6. Click on the ticket number to open it



7. Make your updates to the ticket

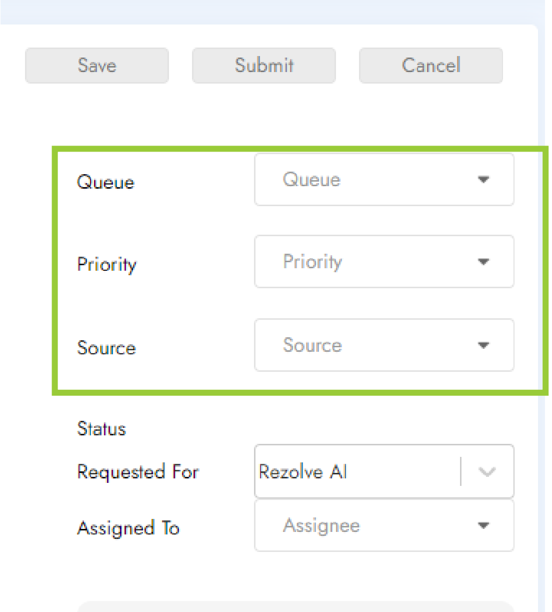
8. The ticket will stay on the screen until you click "Update Ticket", "Back to Ticket List" or "Cancel"



Creating a new ticket

1. Navigate to **Ticket Mgmt** and click on + **Create ticket**

2. **Enter the details** like Subject, Domain, Category, Description.
3. Select the oppropret Queue, Priority and Source

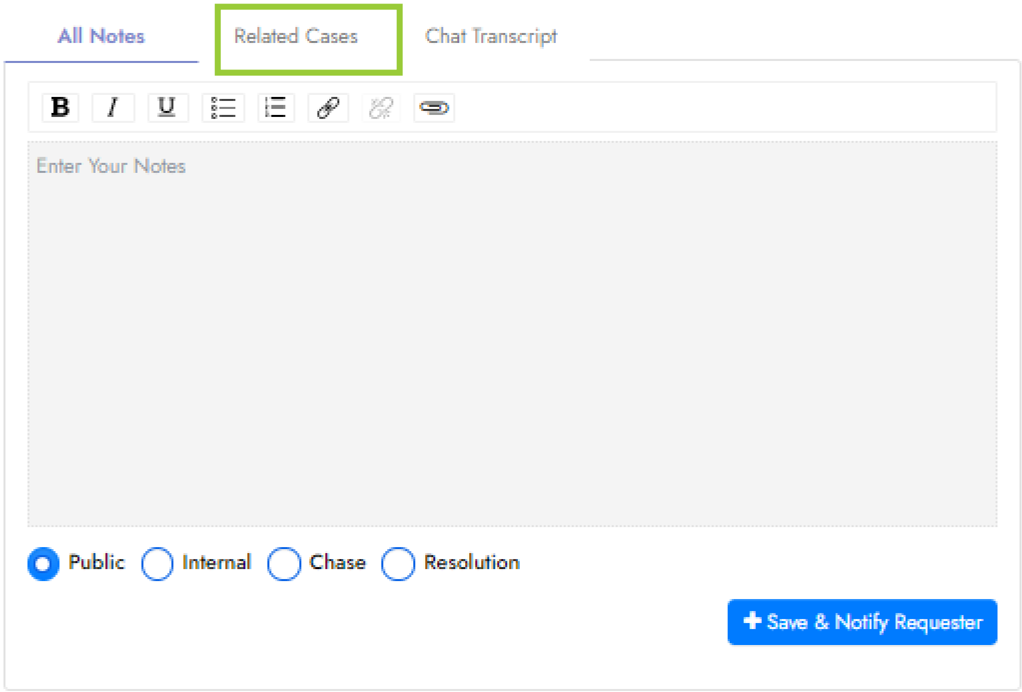


4. Select the **Requested For** (if different from Submitted By)
5. Click on **Submit**
6. You will get a message on Top right saying Ticket Submitted.
7. Navigate to the **"Submitted by Me "**tab and the ticket will be available as the very first option.
8. Open the same ticket again and update the **Assigned To** with the member name you want to assign the ticket to. The Assigned To field is prepopulated based on Key like Domain and comes up only after submitting the ticket. Once done, Click on **Update.**
9. Ticket status can be changed by selecting the next status available on the top right. The status button will auto change the status based on your current status of the ticket.
10. **Ticket Status workflow:**
11. Submitted - >Assigned ->InProg ->Resolved - > Close / Reopen
12. You can add/modify fields in an open ticket and click on **Update Ticket** from the top right at any point /any stage to have the new changes saved in the ticket.
13. **NOTE**: The above may vary depending on the customization of your ticketing model

Review Chat Transcript

To see the conversation between the bot and the requester:

1. Navigate to **Ticket Mgmt**
2. Select **My Tickets**
3. Open the ticket and scroll down to the Notes section
4. Click on Chat Transcript



Add Watchers to a Ticket

A watcher is someone (outside of the requester) who needs to be aware of what is happening on a ticket. Having them also helps when you want to take some input from any other user – for example – an approval or a suggestion.

1. Open the ticket that you want to update from the ticketing list by clicking on the ticket number.

   Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt** -> **My Tickets** or by Searching for the ticket number in the search field.

2. Scroll down to the Watcher section
3. Add watcher as 'To Watcher' or 'CC Watcher'

   Notes:

   - **'To' watcher -** Agents can add a 'To' watcher in case they want the watcher to be in the 'To' participants of each Notification email.
   - **'CC' watcher -** Agents can add a 'CC' watcher if they want the watcher to be in the 'CC' participants of each Notification email.

- To notify someone who is not in the system yet, add them using the 'Create User' button in the watcher section.

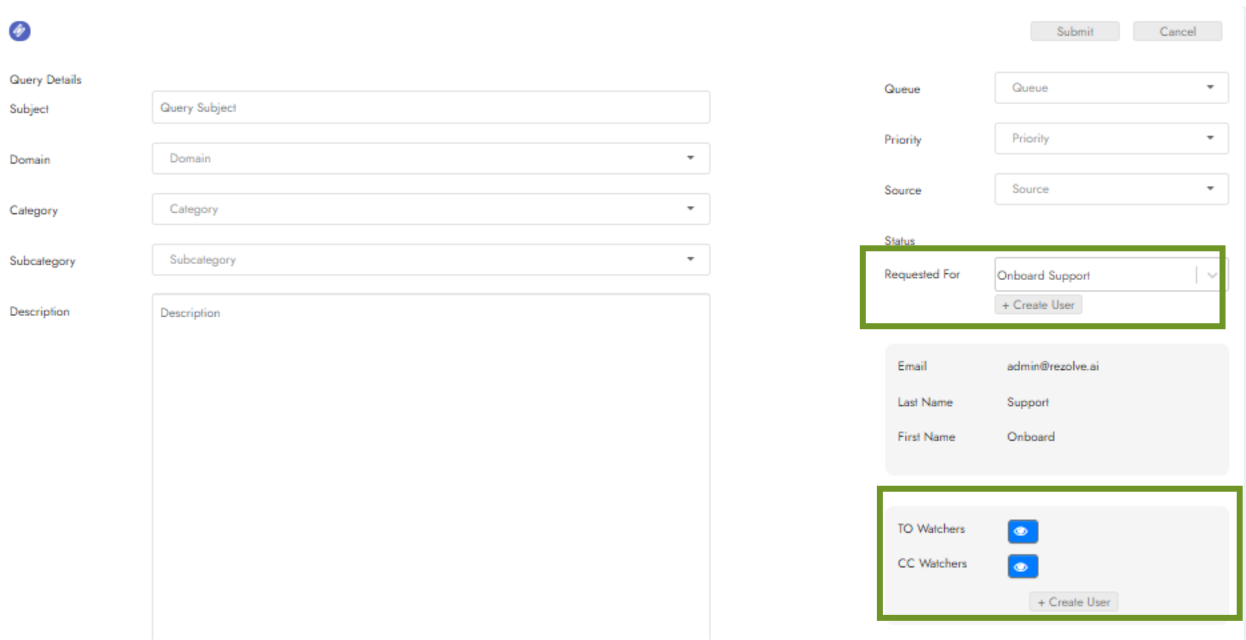
Creating a Requester or Watcher Manually

Users not in the ticketing system yet can be manually created and added as a Requester or Watcher.

1. Open the ticket that you want to update from the ticketing list by clicking on the ticket number.

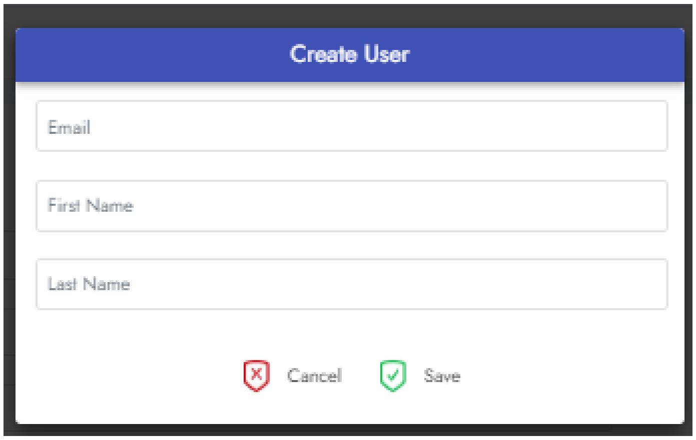
   Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt** -> **My Tickets** or by Searching for the ticket number in the search field.

2. Scroll down to the Requester or Watcher section



3. Clicker + **Create User** button

4. Enter the persons email, first name, last name and click **Save**



5. Now select your created person from the dropdown list

Updating an existing open ticket

Updating an existing open ticket can involve:

- ✓ Changing the **Subject** of the ticket
- ✓ Changing the **Description** of the ticket
- ✓ Changing ticket properties such as Domain, Category, Subcategory.
- ✓ Changing the **"Assigned To"** field.
- ✓ Changing of the **"Requested For"**.
- ✓ Updating **Status** of the ticket using **workflow** buttons.
- ✓ Notes

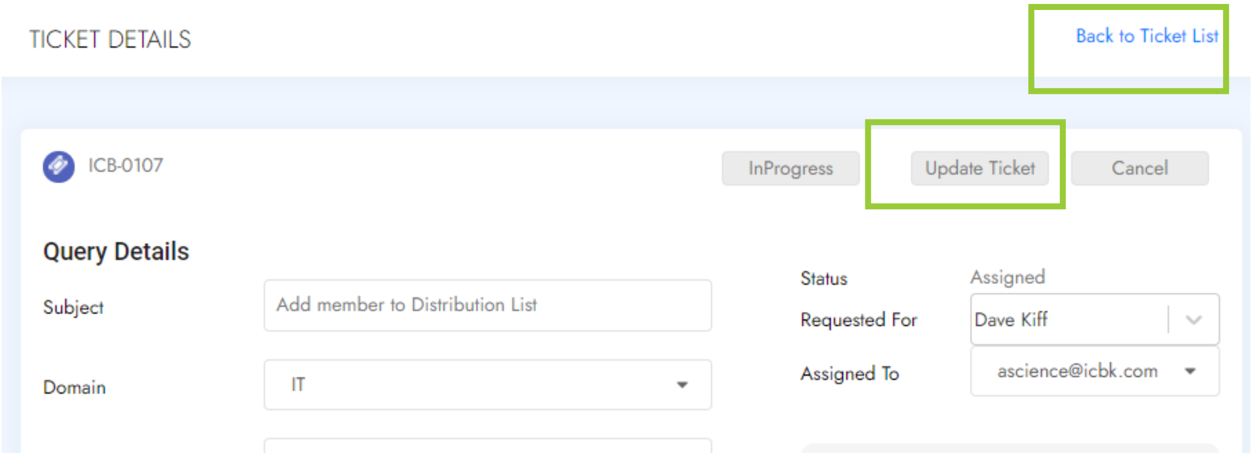
To update a ticket, please follow these steps:

1. Open the ticket that you want to update from the ticketing list by clicking on the ticket number.

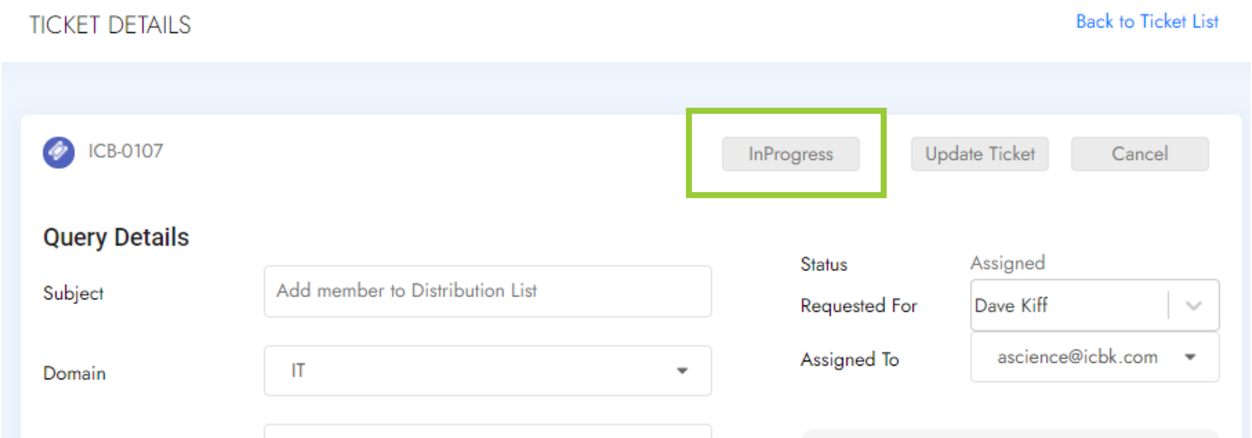
   Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt** -> **My Tickets.**

2. Make update

- o Update the desired field and click on **Update Ticket** from top right.
- o If your only change was adding a Note, click "**Back to Ticket List**" or "**Cancel**"



- o If you wish to update the status of the ticket, click on the status workflow button available on the top right just next to the Update Ticket button.



3. The ticket you just updated will be available on the very top based on the filter -Last created/updated on the top
4. If you did some changes and would like to discard them before saving, please click on **Cancel** from the top right just next to the workflow button.

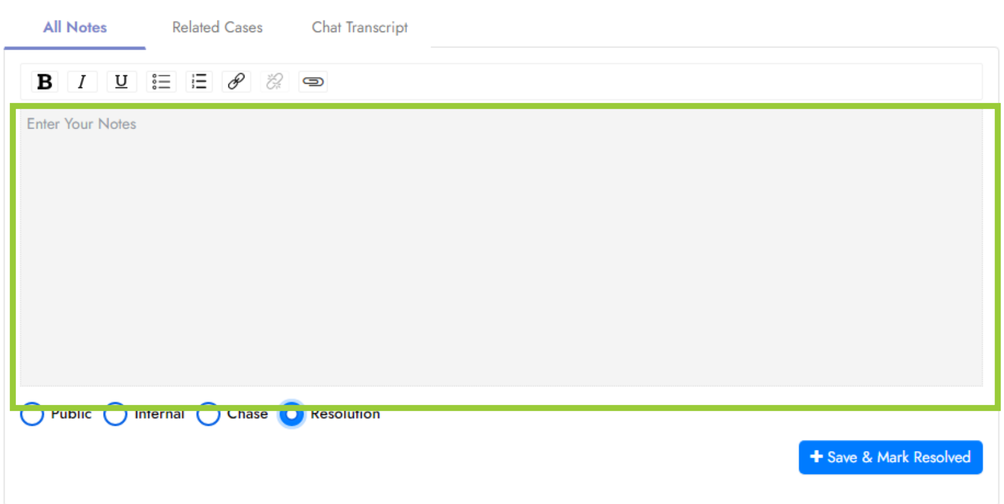
NOTE: The above may vary depending on the customization of your ticketing model

Adding a Note

1. Open the ticket that you want to update from the ticketing list by clicking on the ticket number.

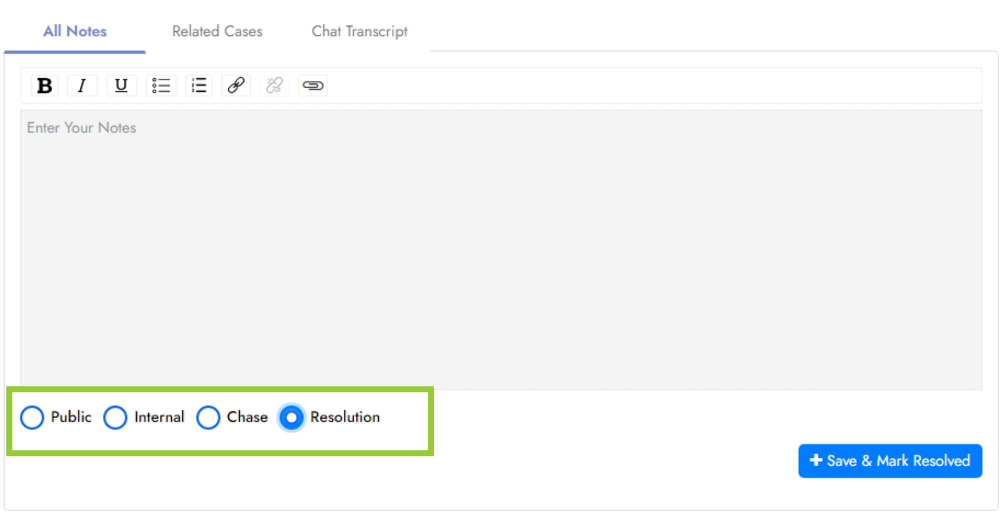
   Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt** -> **My Tickets** or by Searching for the ticket number in the search field.

2. Scroll down to the Note section
3. Add your Note



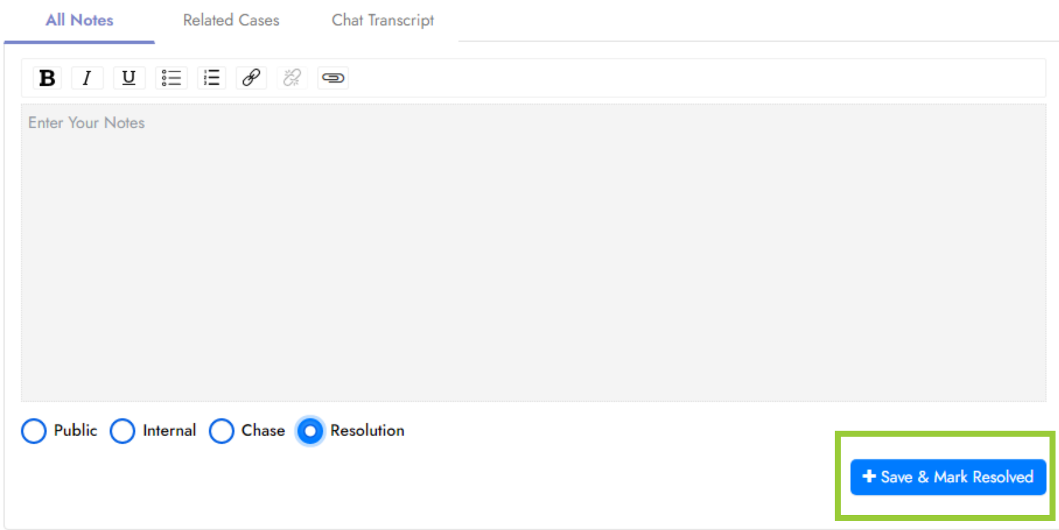
4. Select your note type

- **Public Notes** - These notes are visible to everyone who can view the ticket. Agents can use this note to notify the end-user.
- **Internal Notes** - These notes are only visible to Agents. Internal notes can be used for internal communications when you don't want to notify the end-user.
- **Chase Notes** - These notes are only visible to Agents when a chase note is added, it sends an email to the Assigned Agent and the Supervisor of the Assigned Agent. This can be used when the end-user contacts the support team for an update or further assistance on an existing ticket but the agent (currently speaking with the end-user) is unable to to provide either.
- **Resolution Notes** - To resolve a ticket in a gif Agents can add a Resolution Note. When a Resolution Note is added it notifies the end-user, moves tickets to 'Resolved' state, and brings Agent to the ticket list screen.



5. Click on:

- 'Save & Notify Requester' (when note type is Public)
- 'Save' (when note type is Internal)
- 'Save & Escalate' (when note type is Chase)
- 'Save & Mark Resolved' (when note type is Resolution)



6. Click **Update** when you are done making any changes

Tagging Someone in a Note

You can tag someone in your note to call them out if needed. This will automatically add them as a watcher on the ticket.

1. Open the ticket that you want to update from the ticketing list by clicking on the ticket number.

   Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt** -> **My Tickets.**

2. Scroll down to the *Notes* section (Right under Attachments)
3. To call out the person simply type @
4. This will cause a dropdown list of name to appear, you can scroll through the list or continue typing out the name
5. Select the person and write your note

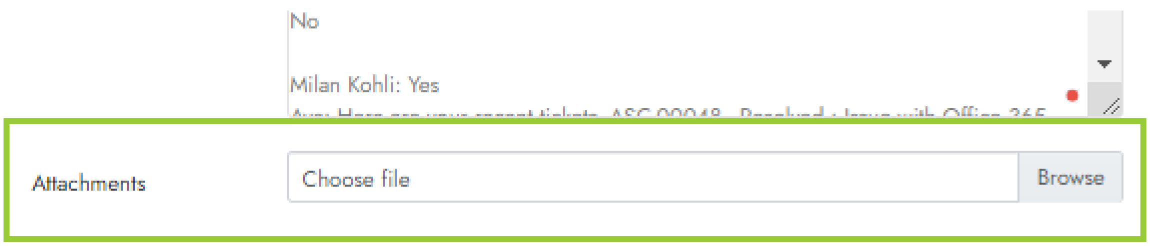
Note: If you do not see the person in the list add them manually as a watcher.

Adding an Attachment

1. Open the ticket that you want to update from the ticketing list by clicking on the ticket number.

   Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt** -> **My Tickets.**

2. Scroll down to the *Attachment* section (Right under Description)
3. Click **Browse**



4. Select the file to be added

   Note: We suggest a note be added stating that file was attached

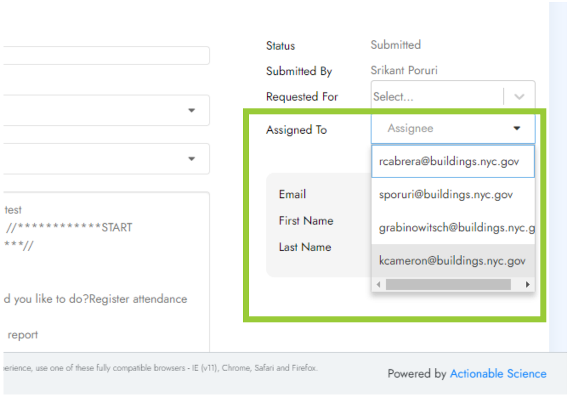
5. Click **Update**

Assign a Ticket to someone

1. Open the ticket that you want to assign from the ticketing list by clicking on the ticket number.

   Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt** -> **My Tickets.**

2. Look for *Assign To*
3. Next to it is a dropdown box, click on the dropdown box



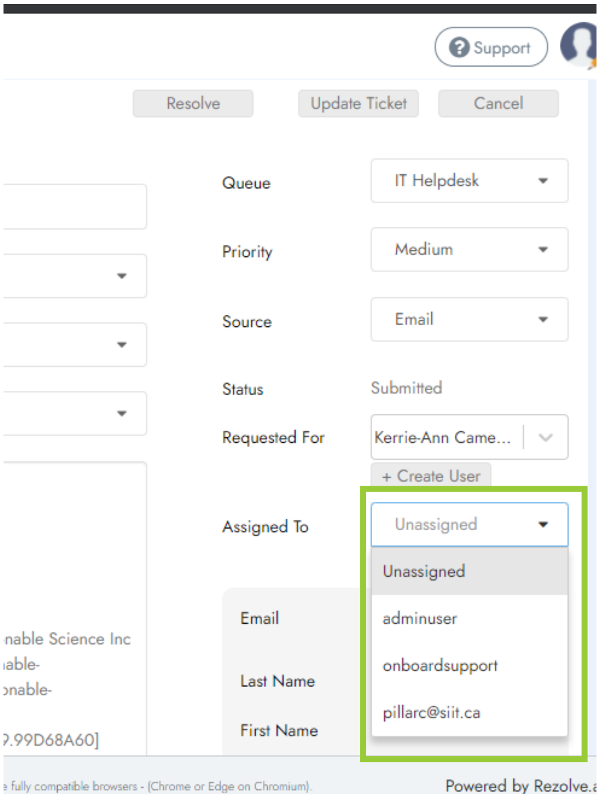
4. You can either search by typing the name or scrolling through the list, click on the name once you find the one you want
5. Click **Update Ticket**

Unassigning a Ticket from someone

1. Open the ticket that you want to unassign from the ticketing list by clicking on the ticket number.

   Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt** -> **My Tickets.**

2. Look for *Assign To*
3. Next to it is a dropdown box, click on the dropdown box



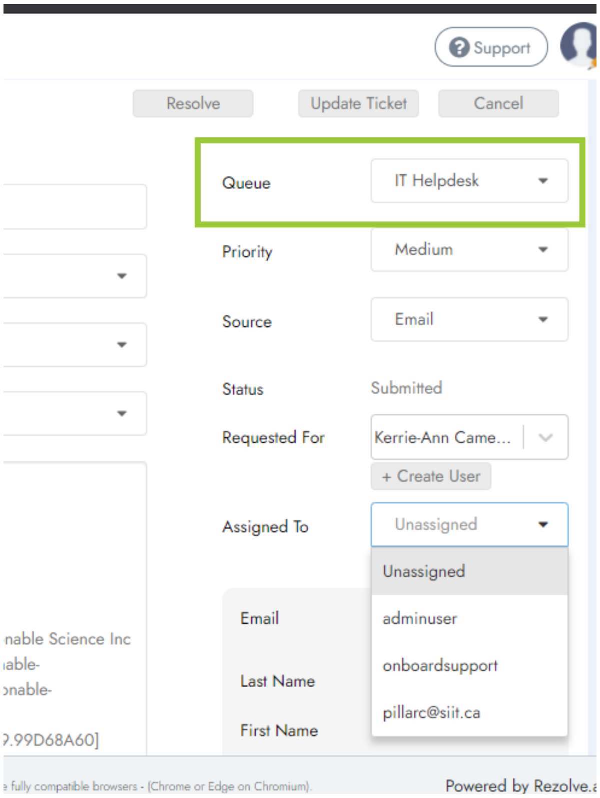
4. You can either search by typing or scrolling through the list, click on **Unassign**
5. Click **Update Ticket**

Assigning a Ticket to another Queue

1. Open the ticket that you want to assign to a different queue from the ticketing list by clicking on the ticket number.

   Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt** -> **My Tickets.**

2. Look for *Queue*
3. Next to it is a dropdown box, click on the dropdown box



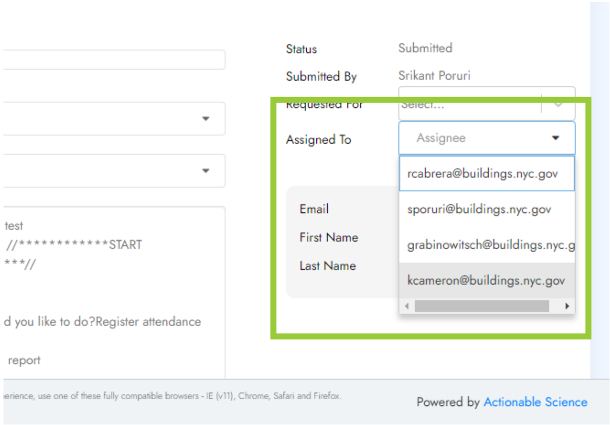
4. You can either search by typing or scrolling through the list, click on the Queue you want to assign it to
5. Click **Update Ticket**

Resolve a Ticket

1. Open the ticket that you want to update from the ticketing list by clicking on the ticket number.

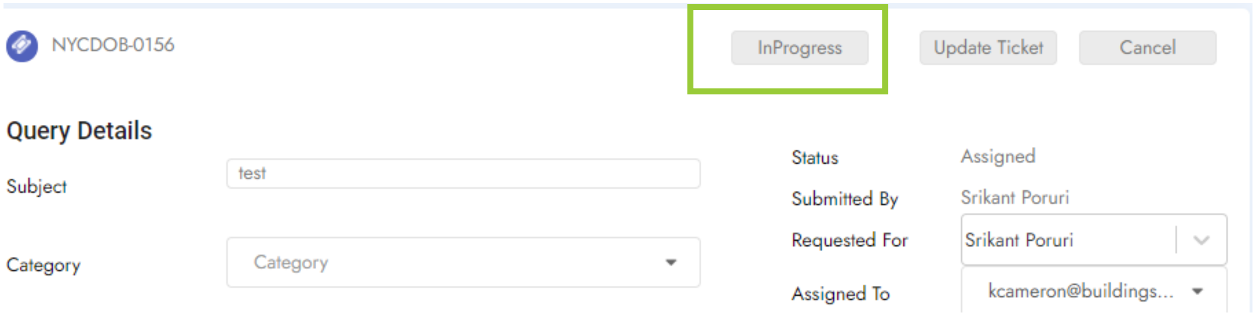
   Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt** -> **My Tickets.**

2. If the ticket status is *Submitted* continue to step 3, if your ticket is in *Assigned* status skip to step 6 or if the ticket is already *In Progress* status continue to step 7
3. Assign the ticket to yourself by selecting your name from the Assign To dropdown box

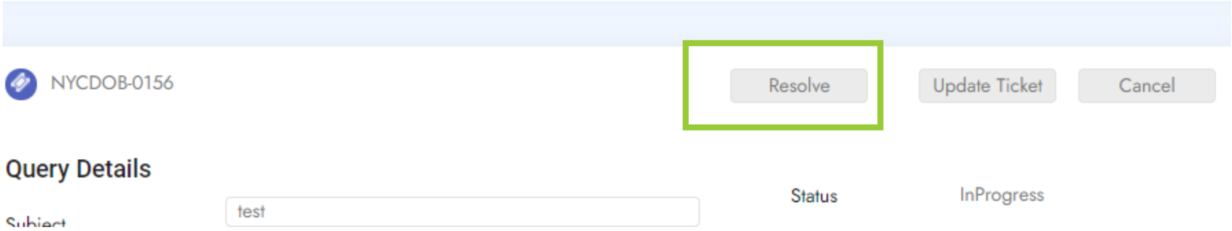


4. Click **Update Status**
5. The ticket will automatically close, go to *My Queue – Assigned* to locate the ticket and open it again
6. Click **In Progress** button.

   Note: To get the Resolve button, we must first change the ticket status from Submitted to In Progress.



7. Add any notes you may need to
8. Click on the **Resolve** button or add a *Resolution Note*

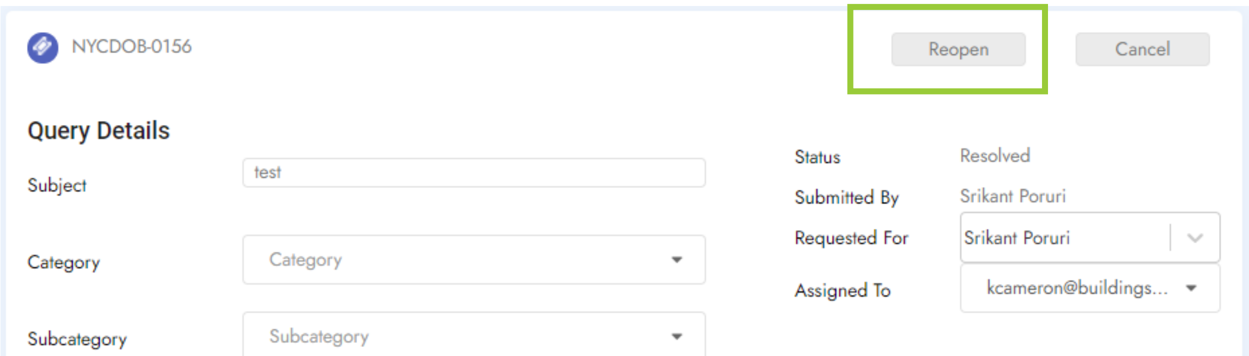


Reopen a Ticket

1. Open the ticket that you want to update from the ticketing list by clicking on the ticket number.

   Note: Ticketing list is the list of all tickets in your queues and can be accessed by **Ticket Mgmt** -> **My Tickets.**

2. Click **Reopen**



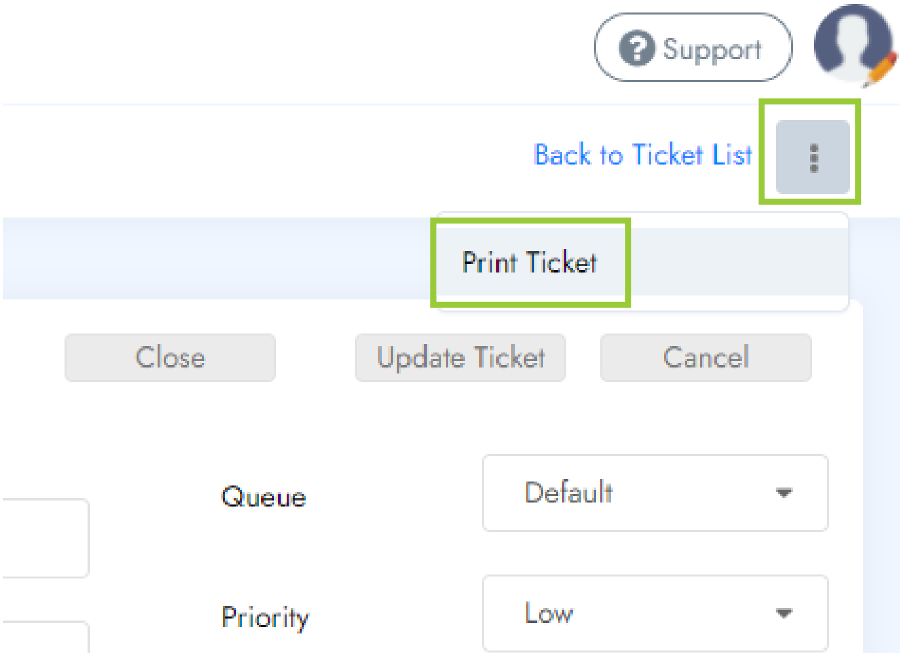
Printing a Ticket

Access level needed

✓ Ticket Agent Supervisor

Instructions

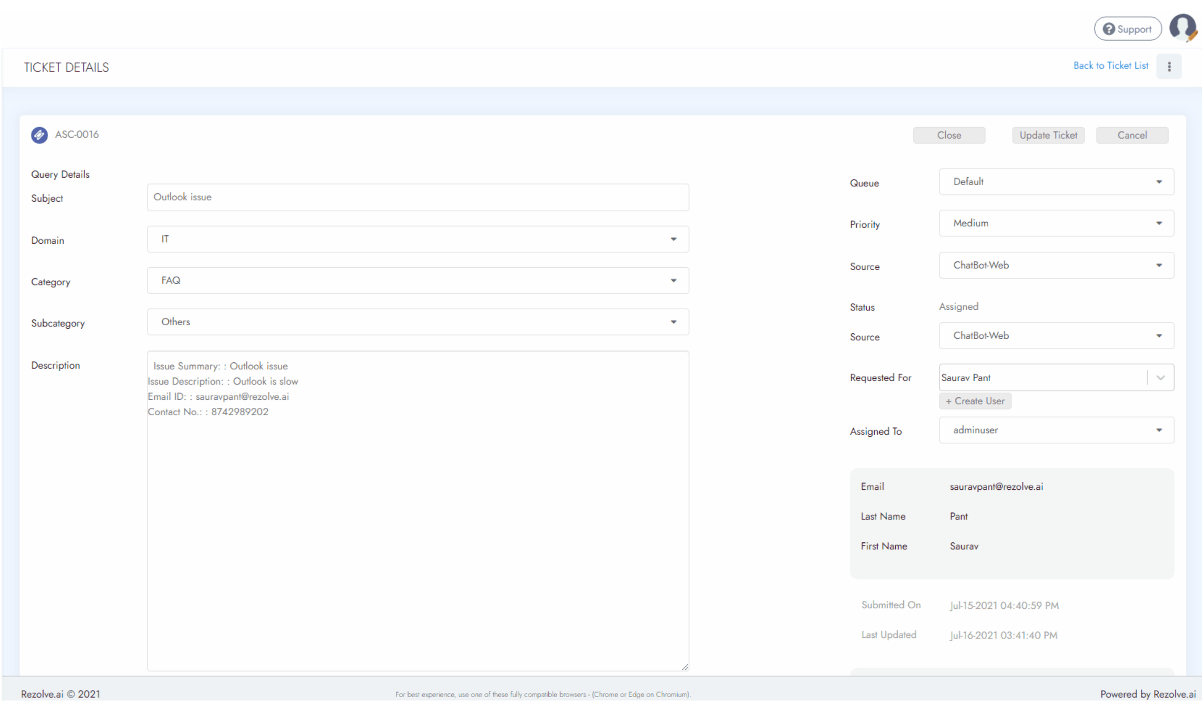
1. Open the ticket that you want to **Print**.
2. Click on the 3-dot menu and select **Print Ticket**.



3. This opens the printer-friendly view of the ticket.

4. Click on the **Print** button to open your browser's print window.

5. Select the preferred Printer Settings and click **Print**.



Ticket Agent Supervisor

As a Ticket Agent Supervisor:

- The *My Queue – Assigned* tab shows tickets assigned to ALL agents
- Tickets can be Close no matter status
- Granted access to run Ticketing specific reports
- Granted access to Ticketing Dashboard

Assigning a Ticket Agent Supervisor to a Queue

Access level needed

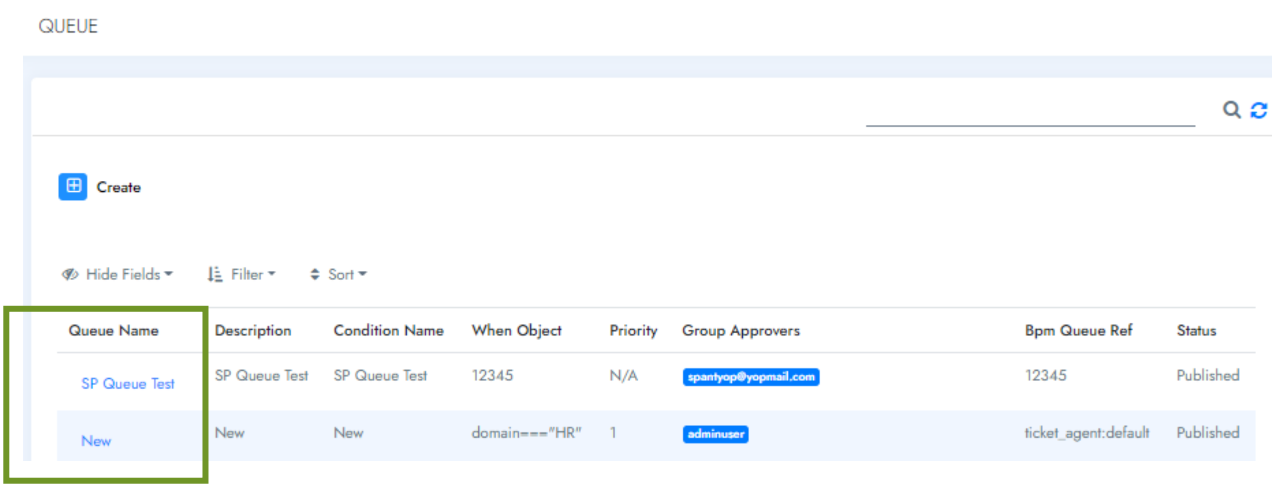
✓ Ticket Admin

Pre-requisite

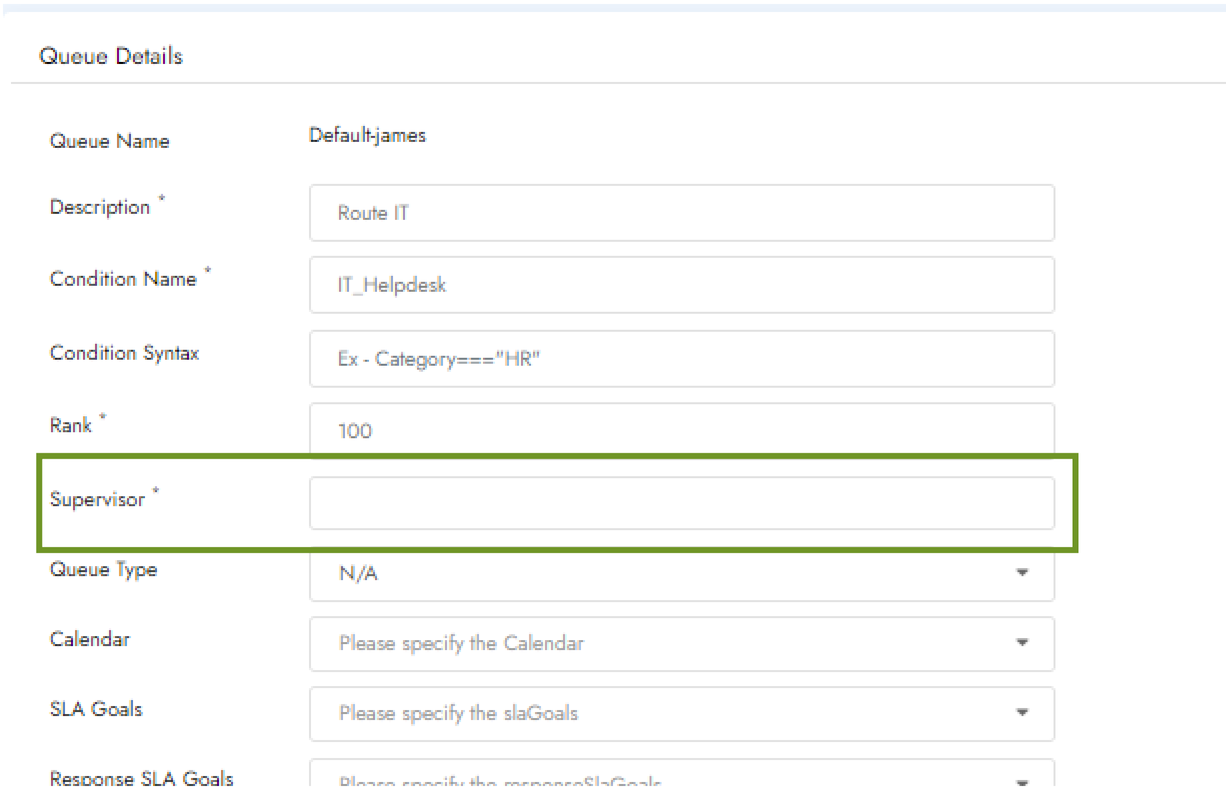
✓ The user has already accessed the virtual agent once and is available in User Management as a User with the role "Ticket Agent Supervisor".

Instructions

1. Click on **Ticket Management**
2. Select **Queue**
3. Select the Queue Name



4. Go to *Supervisor* select the approver from the dropdown list



5. Click **Update**

Closing a Ticket

Access level needed

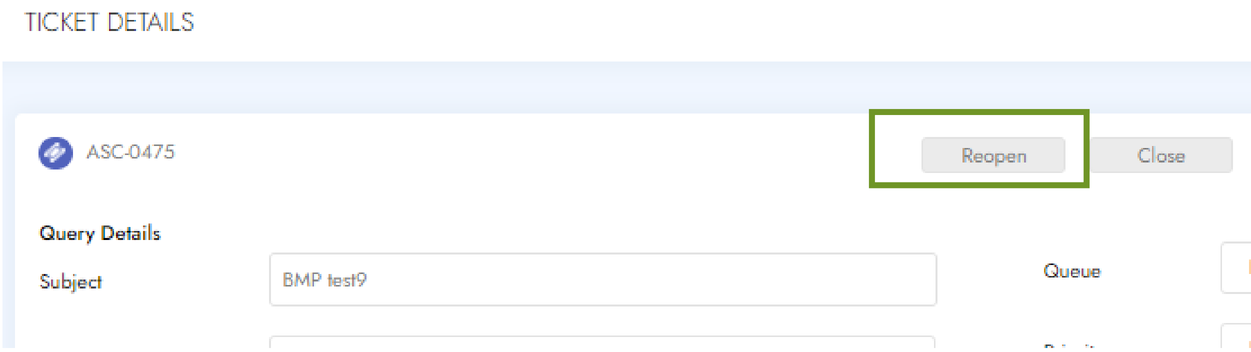
✓ Ticket Agent Supervisor

Pre-requisite

✓ The user has already accessed the virtual agent once and is available in User Management as a User with the role "Ticket Agent Supervisor".

Instructions

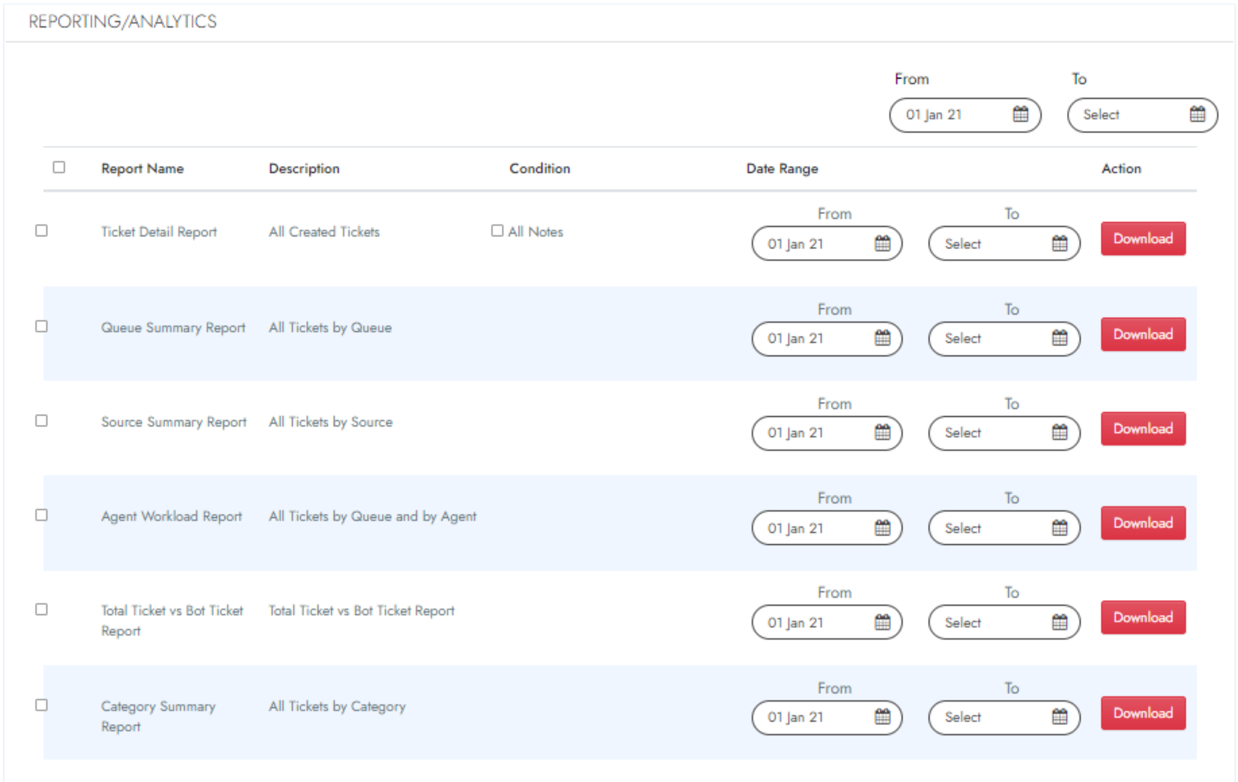
1. Click on **Ticket Management**
2. Select **My ticket**
3. Select the ticket
4. Click **Close**



Ticketing Reports

About Ticketing Reports

- Reports include:
    - Queue Summary Report – will show a breakdown of ticket quantities by status for the queues.
    - Source Summary Report – will show a breakdown of ticket quantities by status by source.
    - Agent Workload Report – will show you ticket quantities by queue and by an agent.
    - Total Tickets vs Bot Tickets – will show you total tickets create vs bot tickets created and out of the bot tickets how many were resolved by the bot.
    - All tickets by Category – will show you a breakdown of the number of tickets based on ticket category and subcategory.



Running a Ticketing Report

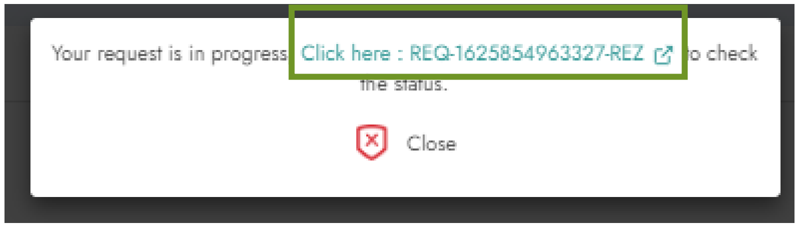
Access level needed

Ticket Agent Supervisor

Instructions

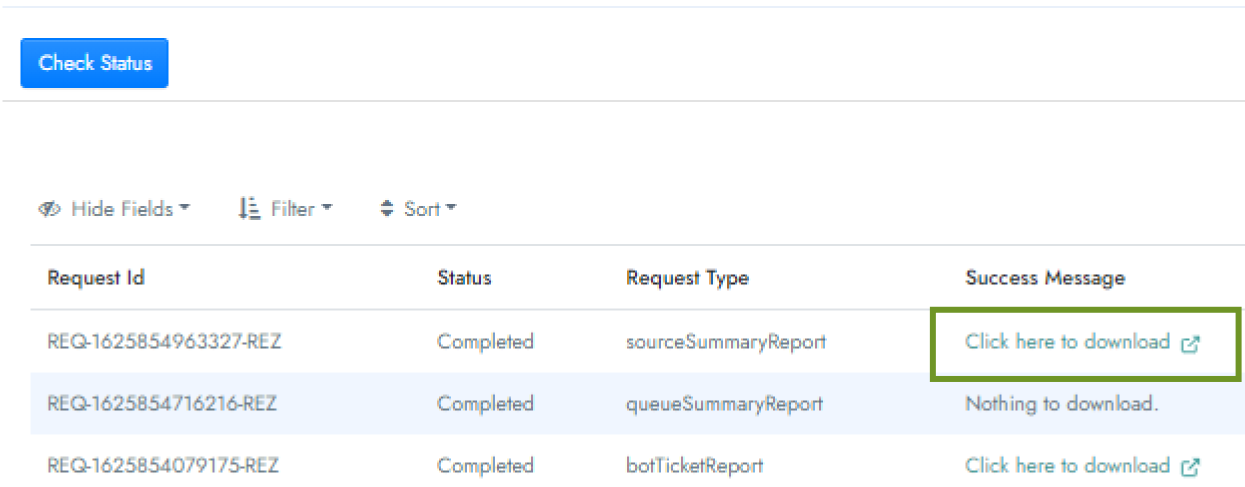
To run a Ticketing report simply follow the below steps or click here to see a step by step video instead:

1. Select **Ticket Management**
2. Select **Reports** from the Ticketing sub-menu
3. Find the report you would like
4. Enter the date range you would like to see
5. Click **Download**
6. Select the **Click here** link in the pop-up (this will redirect you to the Request menu option)



Note: The **Request** page is also available from the Ticketing sub-menu option (Found right above Reports)

7. Once your report has been complied, select **Click here to download**



Note: If the request status is *Pending*, simply click the **Check Status** button to see the most recent status of your request.

General terminologies used in out of box ticket setup

Submitted by: This is the creator of the ticket. This can be an end-user or a support staff depending on the setup in your organization.

Requested For: This is the user for whom the ticket is created for. This can be the same or different from the user in Submitted by field.

Assigned To: This is the support staff/agent to whom the ticket has been assigned. This is the user who works on the tickets.

Attachment: This is a feature in our ticketing to support attaching images such as screenshot, errors etc.

NOTE: The above may vary depending on the customization of your ticketing model.

User Management is where users who can access the admin console are added/edited and assign appropriate roles.

Virtual Agent Roles

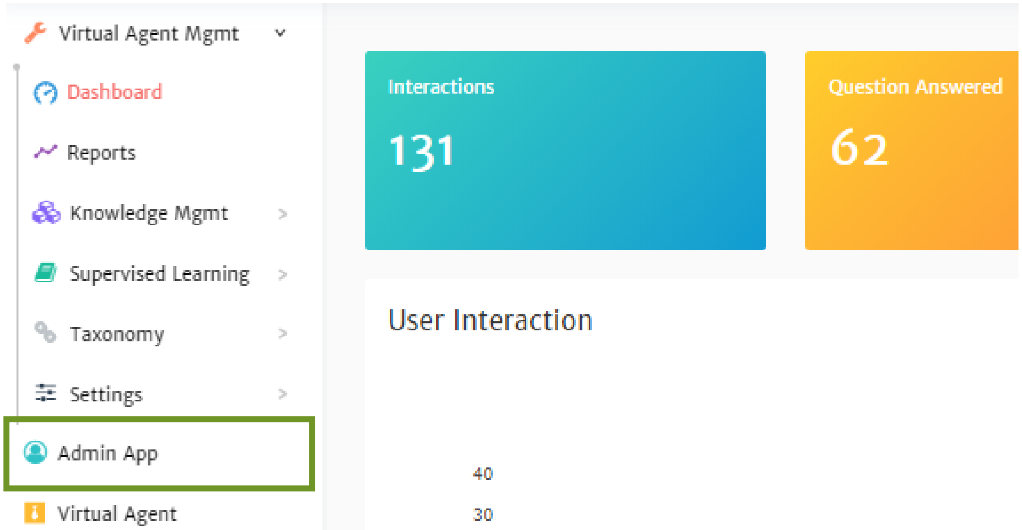
What you are able to see in the navigation pane depends on what roles you have been given in the Admin Portal.

Role	Module	Action / Purpose	Comments
Bot User	Virtual Agent	To access Virtual Agent (Chat Bot)	This is the default / primary role provided to all users who access virtual agent (chat bot) platform for the first time.
Bot Analyst	Virtual Agent Mgmt	Provide access to Virtual Agent (Chat Bot) Management	This role allows a user access to all sections of the Virtual Agent Mgmt section except Bot Settings (i.e. Access to Manage QA, Supervised Learning, Taxonomy)
Bot Admin	Virtual Agent Mgmt	Provide access for Virtual Agent and other maintenance feature	This role allows a user access to all sections of the Virtual Agent Mgmt section including Bot Settings.
User Admin	User Mgmt	Provide access to User Management	This role allows a user access to create users, define attributes & SSO configuration.
Chat Agent	Live chat	Provide access to My Chats	This role provides an agent access to live chat. The user will be able take live chats in My Chat section.
Chat Agent Admin	Live chat	Provide Access to Live Chat Settings	This role gives a user access to view the live chat settings page with the ability to configure queues and assign (add/remove) agents from queues.
Chat Agent Supervisor	Live Chat	Provides additional Privileges within Live Chat	This role allows you to monitor other agent chats, assign chats to agents and/or re-assign chats if needed. In addition, you can review past Live chats.
Ticket User	Ticket Mgmt	End user access to Self-created tickets	This is the default / primary role provided to all end user in the Ticketing Module. This user can create tickets. They can check ticket status in My Tickets menu.
Ticket Agent	Ticket Mgmt	Provide access to My Tickets	This role allows an agent to see tickets raised by users.
Ticket Agent Supervisor	Ticket Mgmt	Provides Supervisor privileges in the Ticketing system.	This role gives you access to ticketing Reports, ability to close tickets at any status and a different view of ticketing if assigned as a queue approver.
Ticket Admin	Ticket Mgmt	Provide Access to Ticketing Settings	This role gives a user the ability to configure queues and assign (add/remove) agents from queues.

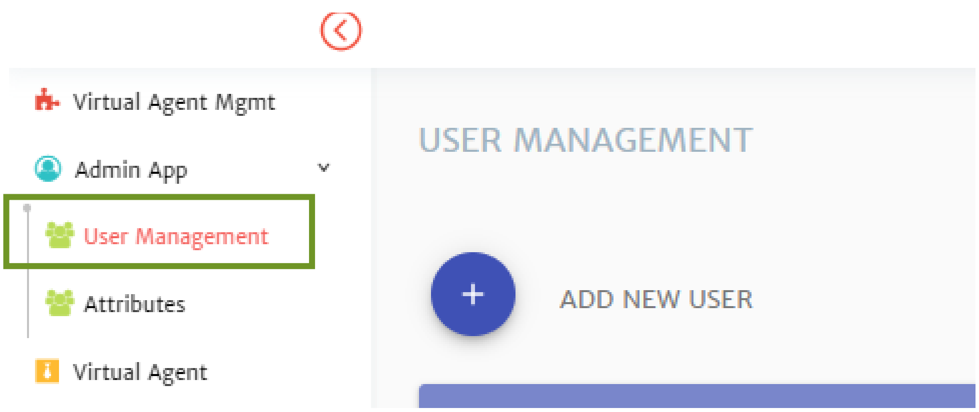
NOTE: Users are advised to logout and re-login to the system for new roles to take effect.

Edit a User Account

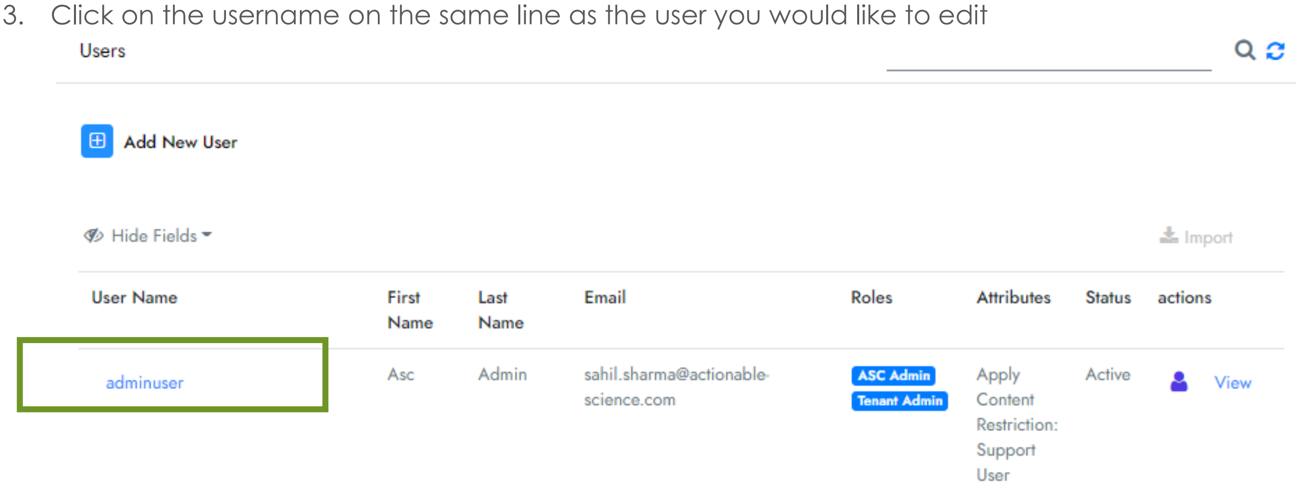
1. Click on **Admin App** in the navigation pane on the left of your console



2. Click on **User Management** in the navigation pane on the left of your console



3. Click on the username on the same line as the user you would like to edit



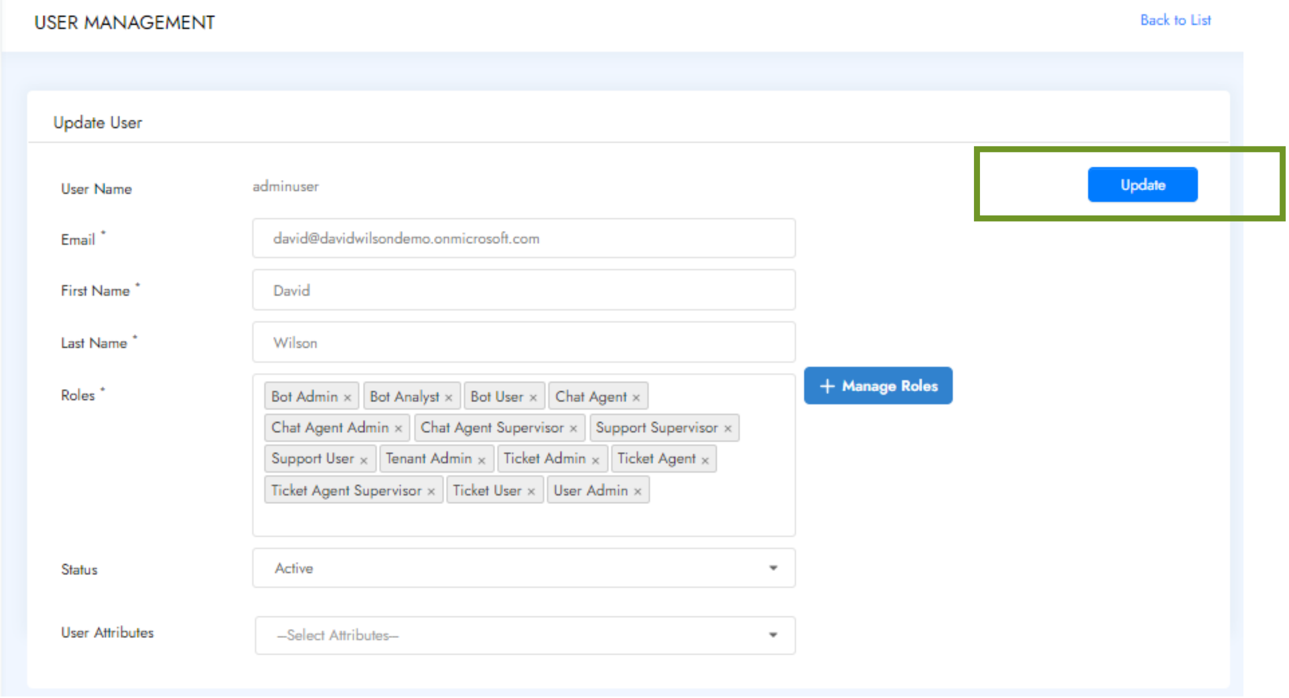
4. A new page will open and you can edit
   - First Name

- Last Name
- Roles
- Attributes

Important Note: Please **only** change **Roles and Attributes** if you have enabled Active Directory. All other information is provided by the account info associated with your AD.

NOTE: When adding and removing a Role, click outside of the Roles box for it to minimize.

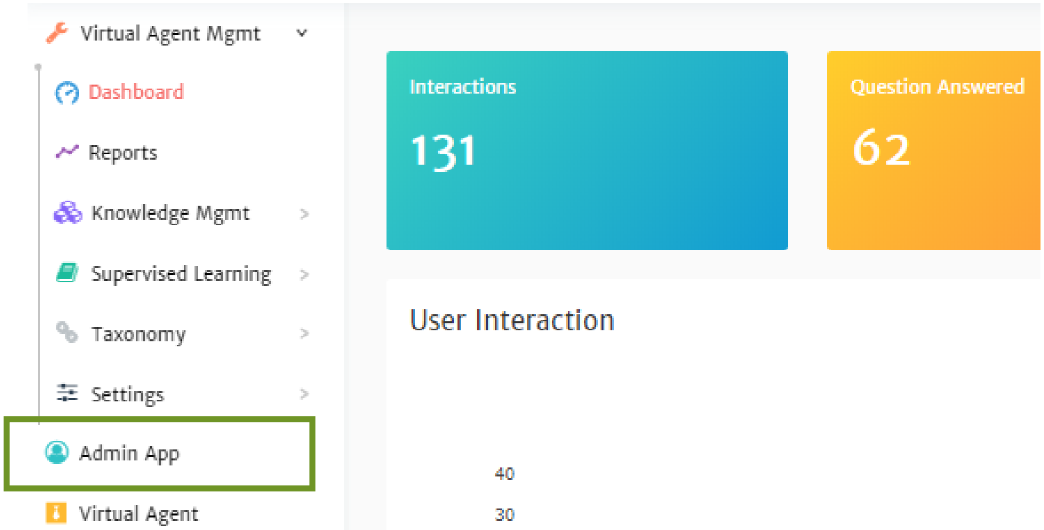
5. When changes are complete, click **Update** to Save



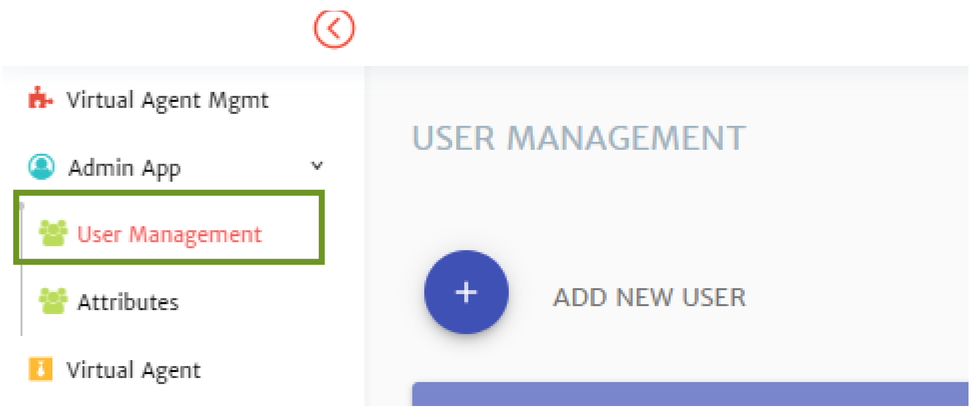
Activate and Deactivate an Account

Accounts can be deactivated and re-activated with a simple click.

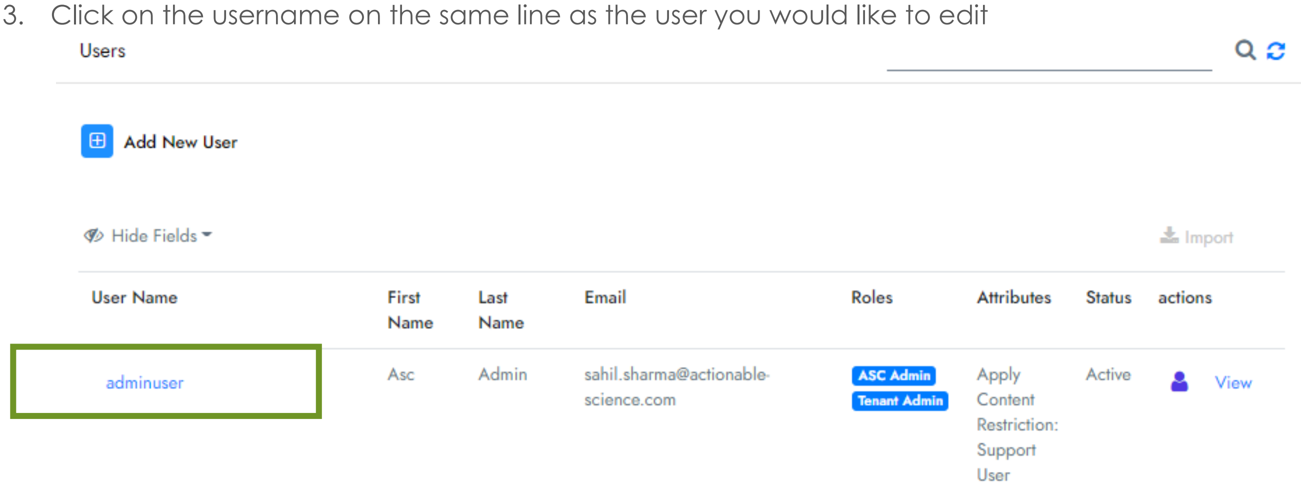
1. Click on **Admin App** in the navigation pane on the left of your console



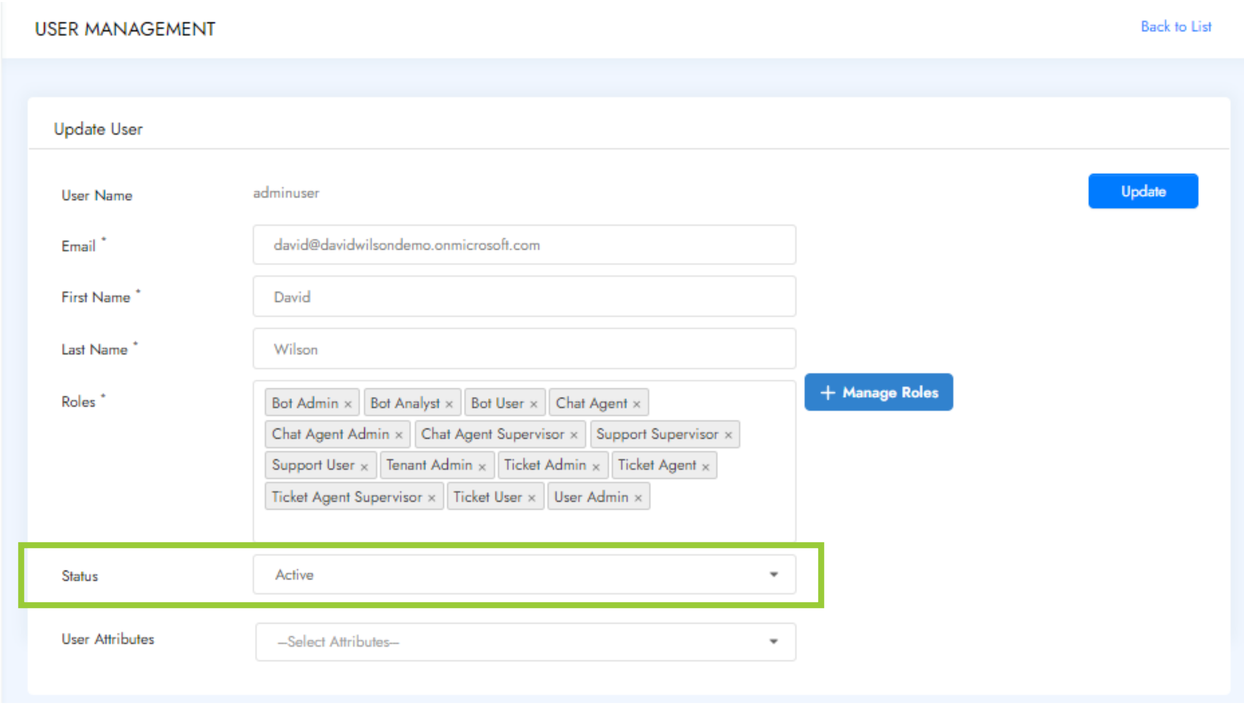
2. Click on **User Management** in the navigation pane on the left of your console



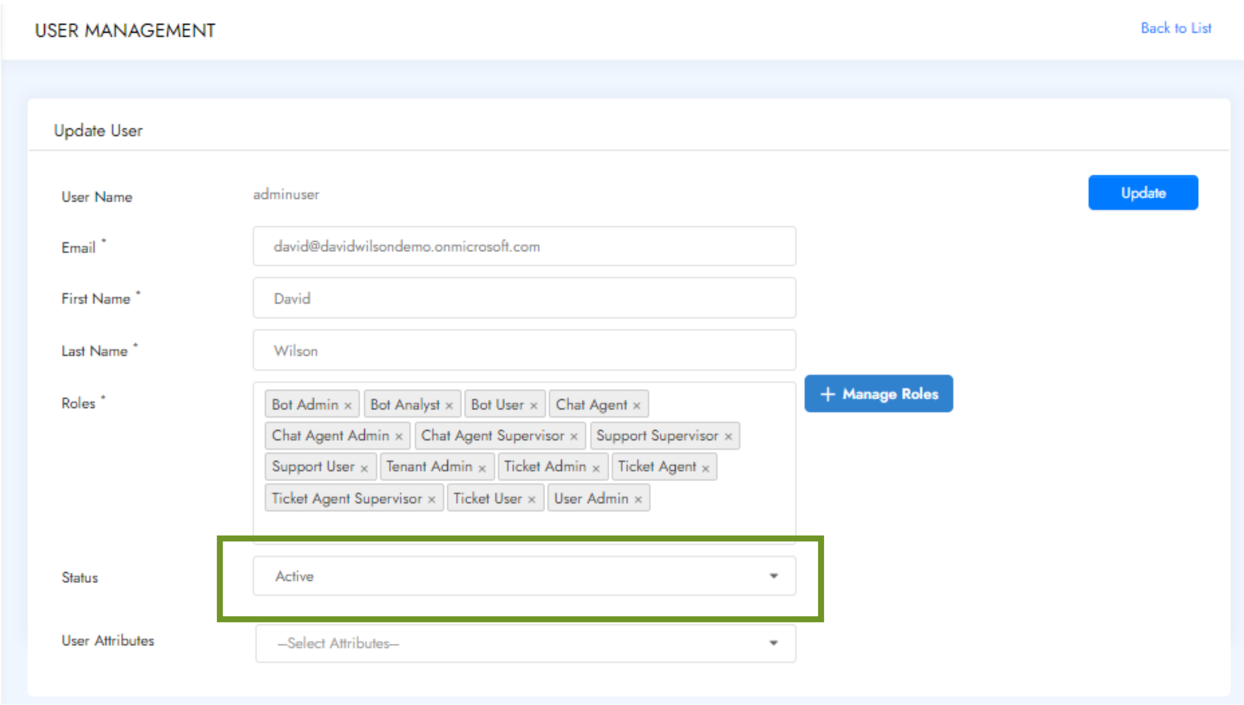
3. Click on the username on the same line as the user you would like to edit



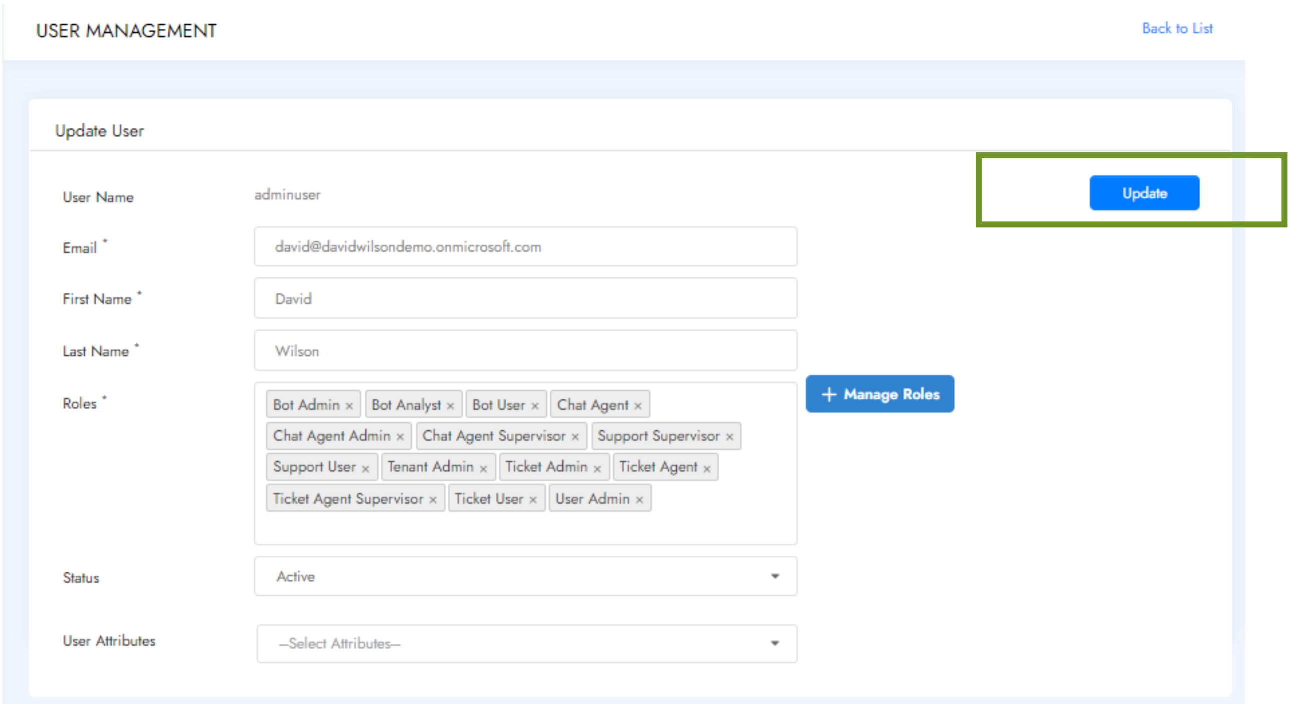
4. Go to the Status field



5. Click on the current Status selection box



6. Choose the status you would like it to be
7. Click **Update** to save your changes


USER MANAGEMENT
Back to List
Update User
Update
User Name
adminuser
Email *
david@davidwilsondemo.onmicrosoft.com
First Name *
David
Last Name *
Wilson
Roles *
Bot Admin × Bot Analyst × Bot User × Chat Agent ×
Chat Agent Admin × Chat Agent Supervisor × Support Supervisor ×
Support User × Tenant Admin × Ticket Admin × Ticket Agent ×
Ticket Agent Supervisor × Ticket User × User Admin ×
+ Manage Roles
Status
Active
User Attributes
--Select Attributes--