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# Reflexion

***ONLINE HELPDESK SYSTEM***

**USER MANUAL**

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Version <2.0>

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## Document Control

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## 0. Preface

### 0.1 Welcome Page

Welcome to Reflexion v2.0! This is an online support system that helps you to fully manage your clients and their support requests. This manual helps you to know how to use this indispensable product in putting your customers first thus placing you among their favourite service providers.

### 0.2 About the Product

Reflexion v2.0 is an online helpdesk system which enables you to track your customers and their complaints by receiving, processing and fixing these issues through its ticketing system. Aside the ticketing system, Reflexion also helps you to

- Create a self-service of solutions that customers can use as a workaround
- Receive feedback regarding support given
- Keep customers in the loop while working on a support request
- Keep an audit trail of all that happens
- Manage all customers registered

The above are a few of the many features of Reflexion v2.0. For a detailed introduction, see ***What is Reflexion*** in chapter 1.

### 0.3 Using this Manual

The main typographical convention used throughout this document is listed below:

In places where you will be asked to refer, ***this font*** will be used.

### 0.4 Additional Resources

This user manual can be found within the application when you are logged in. You can find it at

- Help on the navigation pane.

## 1. Introduction

This chapter provides you with an in-depth explanation of what Reflexion is and what this document covers with respect to the application.

The chapter therefore contains

- What Reflexion is
- The system organisation

### 1.1 What is Reflexion?

Reflexion is a web application (online helpdesk system) which has been designed to help Whitsun find a much better way of tracking our customers' issues together with the means of solving it: giving our customers a sense of being part of the issue solving process.

Reflexion provides you with a level of user management where your various clients/customers are registered unto the system, stating their roles i.e. whether personnel or primary contact. Users from our outfit fall under the engineer, call centre operators and administrator roles. These registered people within your client-base are therefore able to log onto the system and to report any issues faced. The engineers are also able to log on and work on any support tickets raised. The call centre operators receive calls from clients and creates tickets for them based on the concerns raised.

A Self Service containing workarounds to probable issues customers will be faced with when using the system is also included in Reflexion and is open to all who visit the support website. It pools some of its information from previous issues of clients which have been solved. The rest of the self-service information is added directly to help customers and visitors know solutions to frequently asked questions arising from the use of systems and other technology.

For purposes of accountability, Reflexion provides an audit trail for each of the accounts within your company thus making it easy to audit the actions that happen within the system to clients.

There is a report feature which enables the administrator to view details of the application- from customer to ticket ratios, engineer to ticket ratios, tickets outstanding, and ticket sources among others. This helps to know what issues the customers face and response rate aiding in decision making.

Reflexion notifies all users on the system mainly through email. These notifications can be on ticket creation, resolution, more information needed etc.

Reflexion also has a bulk SMS and emailing feature which can be used to reach different categories of clients or to all clients within the system.

With features such as the self-service, email notification system, ticketing system, user profiling system, a rating system, a level of customer relationship management system, and audit trail among others, both service provider and client will be pleased with Reflexion as a means of effective communication in the area of resolving issues that come about after sales.

## 1.2. System Organisation

The system has been organised into

- Support System
  - Ticketing system
  - Feedback/Rating system
  - Email notifications
  - SMS notification
- User Management System
  - Access control
    - Admin
    - Primary Contact
    - Personnel
    - Engineers
    - Call Centre Operators
  - Profile updates
- Self Service
  - From solutions
  - From scratch
- Audit Trail
  - Activity log
  - System log
- Reports

## 2. Getting Started

### 2.1. Introduction

This chapter presents information on all the required resources needed to start using the system as well as the key features it is shipped with.

Within this chapter, you will find

- Key Features
- Environment

### 2.2. Key Features

#### 2.2.1 Self Service

The self-service houses information on how to solve certain problems the customers face. This therefore helps the user to try his or her hands at the solution provided as a first hand help item.

Other problems customers' log, which are closed can also be added to the self-service thus increasing its span such that the solution of some problems will be added. This will help customers with similar issues to resolve them on a self-help basis.

This portion requires no registration and hence all who go to the support site can access this information.

#### 2.2.2 Ticketing System

This is the core feature of the helpdesk system. Most clients experience trouble with some service rendered to them or may need help in using the system or service provided. Such users can then log onto the system to open a ticket or get in touch with our call centre to create a ticket for whatever problem they have for it to be addressed. This ticket will then be taken up by an engineer who will work to solve the problem based on the information provided; however if extra information is needed, the engineer can reach out to the customer via email to get clarification. Should an engineer want to escalate a ticket to another engineer for some reasons, there is the option to do that. Percentage of completion can also be set by the engineer.

In the case where a customer is unable to log onto his account for reasons beyond his control, he can make a call or send an email to our outfit and the staff can enter the ticket details and choose the person from which the information is coming from. The source (phone call/walk-in etc.) of the information is also captured.

A customer also has the option to edit the ticket after filling it. This feature allows the customer to add or remove some information to what was submitted in the incidence of some changes occurring in the problem at hand.

In the case where the customer is satisfied with the work done, he will then close the ticket signalling to the company that the problem has been solved and work is ongoing smoothly. A closed ticket can be reopened if after closure there is the need to reopen that ticket.

### 2.2.3 Rating System

Feedback is a very important tool in analysing the work done for a client. Reflexion comes with a rating system which allows the customer to rate the services provided to them. This feedback is a required feature for a ticket to be closed. This enables you to sit up in the case where conditions were poor and to know where to keep hitting to perfection such that your clients will keep coming for more.

### 2.2.4 Email Notification System

The email system is the main communication medium in Reflexion. Users are notified with emails: from registration, password recovery, extra information needed, among others. This helps customers know their requests are received and work is being done on them. A bulk emailing feature is also available to aid in sending bulk emails which will appear as though they were sent on individual basis.

### 2.2.5 SMS Notification System

Reflexion provides another means of communicating to clients via SMS which can reach clients in places where there is no internet/email. This form of notification can be sent either to all clients or to specific clients per the discretion of the one sending.

### 2.2.6 User Profiling System

We understand there are different users who will be using the system and these users will require different functionalities from the helpdesk system. In view of that, Reflexion has a user profiling system with four different access controls: administrator, engineers, call centre operators (where these three are from the service provider, in this case, Whitsun), primary contact and personnel (from the client's side). These different accounts have their various views pertinent to their duties.

The administrator creates engineers, call centre operators, primary contacts (who are the go-to contacts for each company) and can see the personnel registered to each customer. In a nutshell, the administrator sets up the company ready for the customer complaints and manages these.

The engineer works on tickets and ensures that the customers' issues are solved. The engineer can also aid a customer by creating a ticket for him/her in the case where the customer finds it difficult to log his issue online.

The call centre operator works mainly with tickets by creating tickets for clients who will call and complain or are unable to create a ticket. He can also track the progress of a ticket and can aid the customer to know the state of the request.

The primary contacts create accounts for members within their company and these members can also create tickets for whatever problem they encounter. These primary contacts therefore manage the accounts of the personnel within their company.

The personnel can log into their accounts to create, edit and close tickets.

## 2.2.7 Dashboard

In this fast paced world, it is necessary to be fed with the specifics at a glance so as to get a first-hand idea about what these specifics entail. That is what the dashboard does-from providing the number of tickets available, those resolved, number of engineers registered, the engineer to ticket ratio, etc. It has graphical representation of these details as well. The administrator is provided with this feature which provides him with the specifics such that fast paced decisions can be made on them.

## 2.2.8 Audit Trail

We understand that keeping a trail of activities is very important in ensuring that the right things are done. It also serves as a great reference point when auditing is to be done. In view of this, Reflexion has this feature which logs all activities performed. This therefore makes one accountable for his or her actions.

## 2.2.9 Security

In the day and age where security of systems is very important, it is expedient that the data of clients are kept confidential as they are meant to be. One needs logon credentials to be able to have access to a particular user level. The best encryption methods have been put in place to prevent unauthorised people from having access. The site has also undergone various security tests to ensure that no malicious attacker will be able to get into the system without having the authorised details.

## 2.2.10 Customer Relationship Management

Reflexion provides you with a level of customer relationship management in that it allows you to enter and track your customers, knowing which of them are primary contacts, and those that are personnel. You also have the option to edit these contacts that are in the database as and when the changes are required.

## 2.2.11 Deactivation and Reactivation

There are times some clients may leave or may not be in existence and as such will have to be deactivated from the system. Reflexion provides that option to deactivate a customer or a self-service article that has been captured in the system. There is the option to reactivate a deactivated customer or personnel.

## 2.2.12 Help

In using systems, there are times we need to find out how to perform a particular action. Reflexion aside the user manual which will be provided to you as a separate document on day of deployment, comes with an online help system which gives insight into how to use the system right from within the application.

## 2.2.13 Search

There is a search feature within each page of Reflexion which aids you in finding what you need within the shortest possible time.

## 2.2.14 Report

Reports help to know how one is faring in times of numbers, performance, and at a glance know more details about a system. These details aid in decision making which push the organisation forward.

## 2.3. Environment

Reflexion being an online application requires these to be able to function well:

### 2.3.1 Minimum Requirements

- A supported OS e.g. Windows 7, 8, 8.1 or 10, Linux, Unix
- A good browser e.g. Internet Explorer, Google Chrome, Mozilla Firefox, Opera, Safari, Edge, etc.
- Internet connection as the application is a web application and requires internet to work. Remember, without Internet, Reflexion won't work.
- RAM: 1GB

### 3. Logging in and Logging out of the Application

#### 3.1. Logging into the Application

To start Reflexion,

- Start your browser
- Enter the URL (support.whitsunsystems.com) and press enter

At this point, you can decide to use the self-service and as such click on self-service within the menu on the navigation pane. If not you will have to login to use all the features of the application.

To login,

- Click on the Login link at the top right corner of the homepage. (See fig. 1)

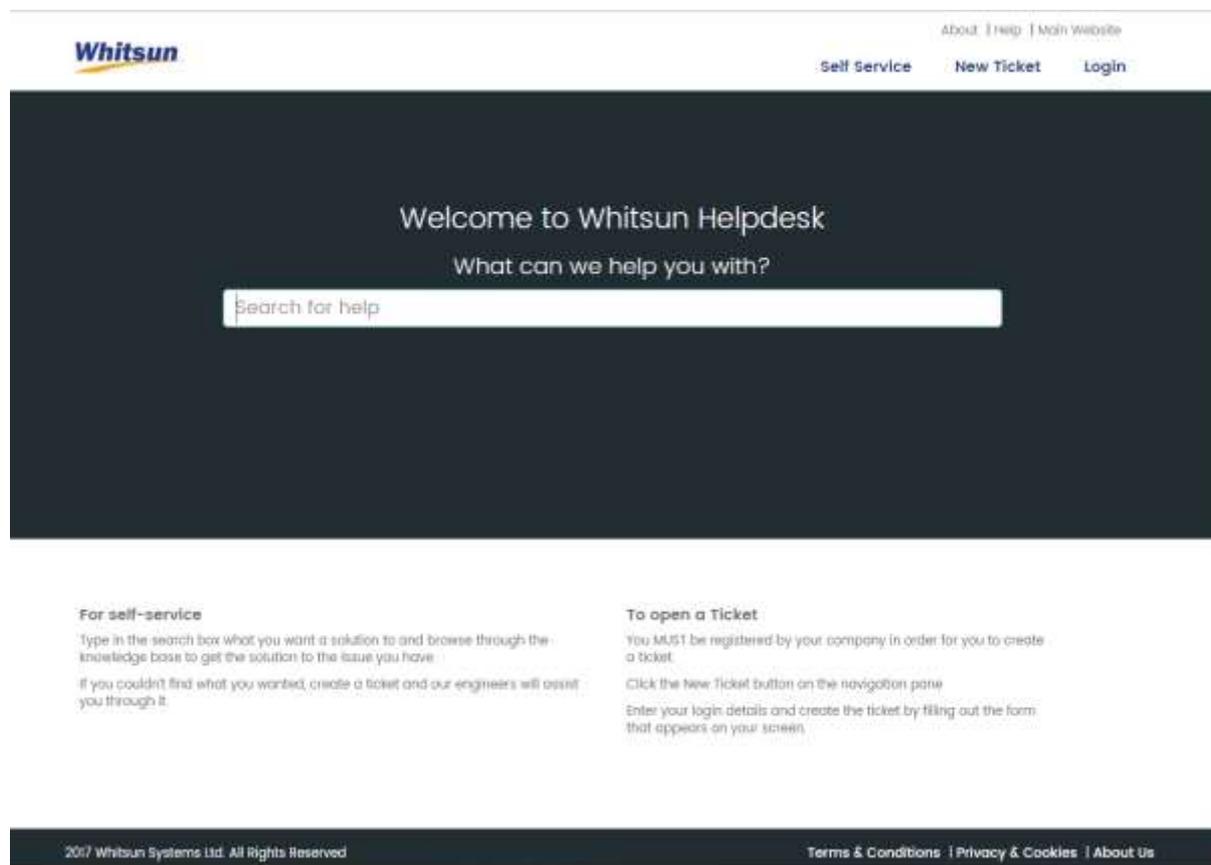


Fig. 1 Login link on homepage.

This leads to the login page where you will enter your username and password and on clicking login, get access to your portal.

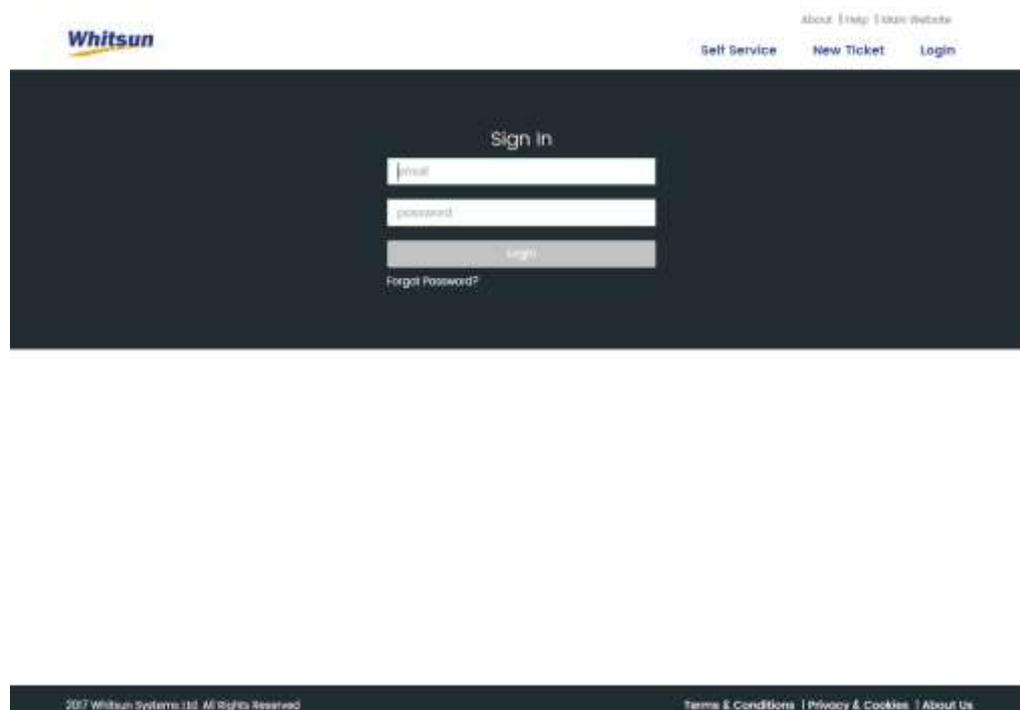


Fig. 2 Login

In the case of forgetting your password, click on the Forgot Password link within the login page. This will require you to enter your email address. The link to change your password will then be sent to your email.

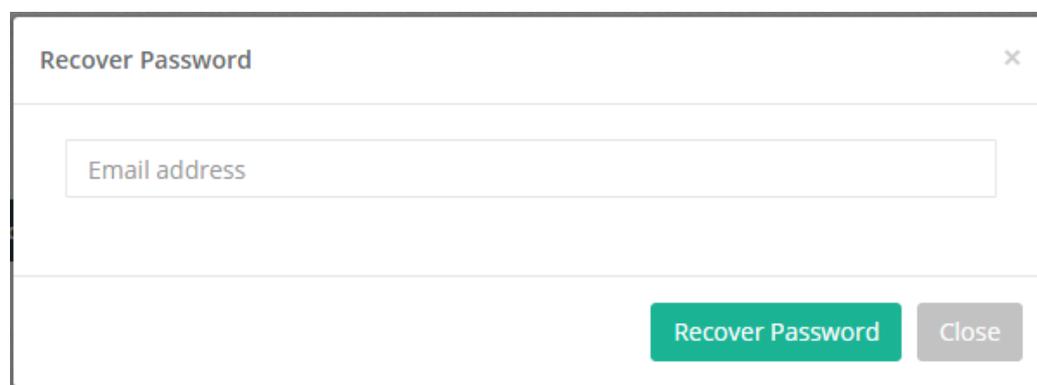


Fig. 3 Recover Forgotten Password

### 3.2. Access Control

Reflexion has five different user levels and all these levels login using the same login page.

The admin registers the engineers, call centre operators and the primary contacts. The primary contact then registers the personnel within his/her company.

To register Personnel Managers,

- Login as admin
- Click on Clients within the navigation pane on the left side of the page (see Fig. 4).

- Click on the New Client button which opens up a modal. The modal brings up a form where details of the new client and the primary contact are filled out and saved (Fig. 5) or to import data from an Excel or .csv file (see Fig. 6).

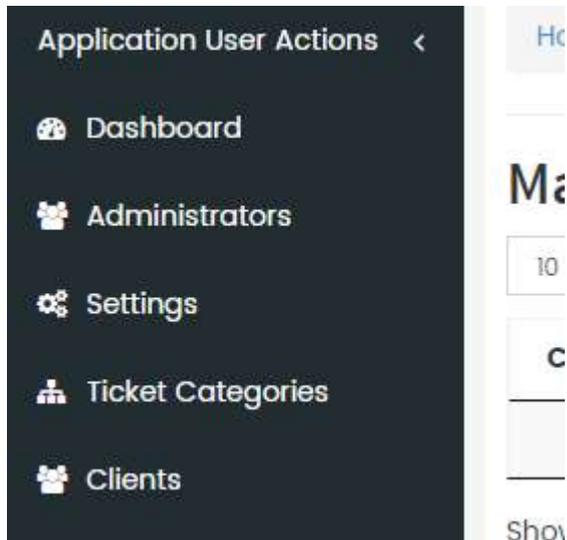


Fig. 4 Register Clients

- To register using the form:
  - Enter the details that appear within the form and click on Save Client.

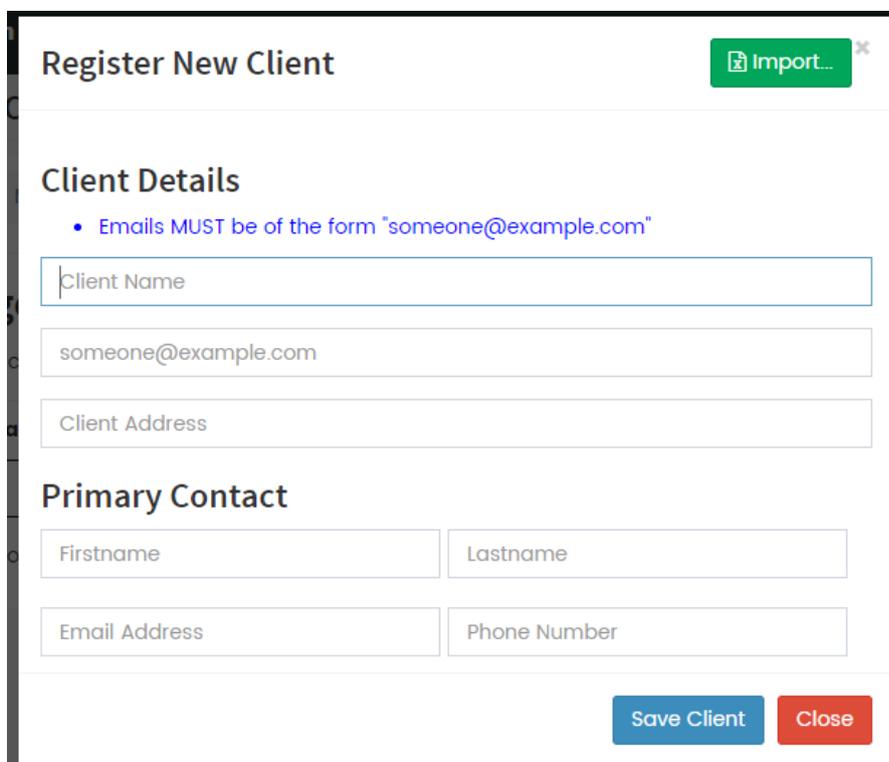
A screenshot of a modal window titled "Register New Client". In the top right corner, there is a green "Import..." button with a file icon and a close 'x' icon. The form is divided into two sections: "Client Details" and "Primary Contact". Under "Client Details", there is a blue bullet point: "Emails MUST be of the form 'someone@example.com'". Below this are three input fields: "Client Name", "Email Address" (containing "someone@example.com"), and "Client Address". Under "Primary Contact", there are four input fields: "Firstname", "Lastname", "Email Address", and "Phone Number". At the bottom right of the modal, there are two buttons: a blue "Save Client" button and a red "Close" button.

Fig. 5 Register a client & primary contact

- To register using import:
  - Click on the Import Data from Excel File button
  - Click on the Choose File/Browse button and after browsing to the file, select the file and click on the Import button.

It is worth noting that the file to be imported should be in the **exact format** as the example shown in the page as that prevents errors during import.

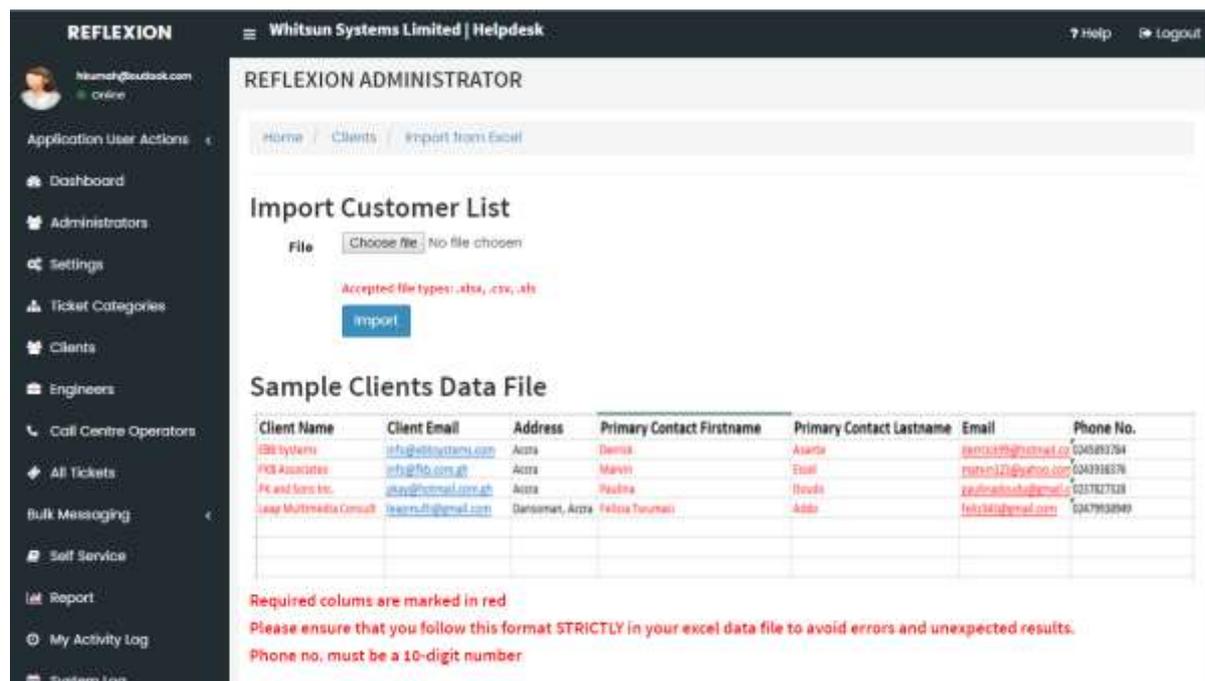


Fig. 6 Register clients and primary contacts through Excel or .csv file import

To register Engineers:

- Login as admin
- Click on Engineers on the navigation pane
- Click on the add engineer icon
- Fill in the details of the engineer and add staff.

You can hold the ctrl key to select multiple categories for one engineer. Note however that the categories need to have already been created. See the next chapter for instructions on how to do that.

To register Call Centre Operators:

- Login as admin
- Click on Call Centre Operators on the navigation pane
- Click on the add new icon,

- Fill in the details and save.

### 3.3 Understanding the interface

The welcome screen each of the users of Reflexion see differ per the user role. The admin sees a dashboard which provides the admin with charts of tickets, their state, source, and active tickets per engineer and per company. Find the admin dashboard below:



Fig. 7 Admin Dashboard

The engineer on logging into his account, sees the various tickets in his possession-whether new, those in progress, those closed and all. This is the dashboard for the engineer and it helps him to know his tickets. See the image below:

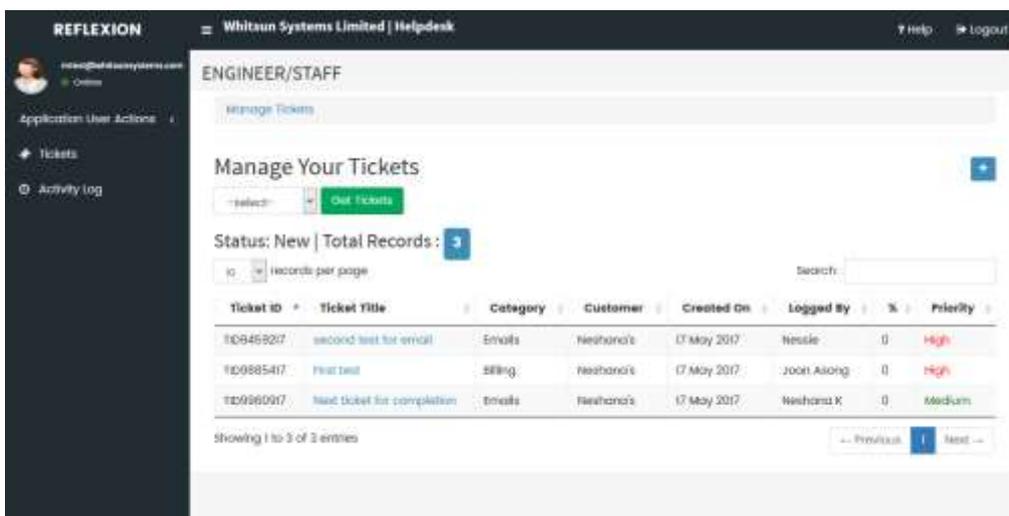


Fig. 8 Engineer Dashboard

The primary contact who is manager for the client also has the opening interface which shows all the registered personnel in their outfit. There are links on the left navigation pane which can be used to manage the account.

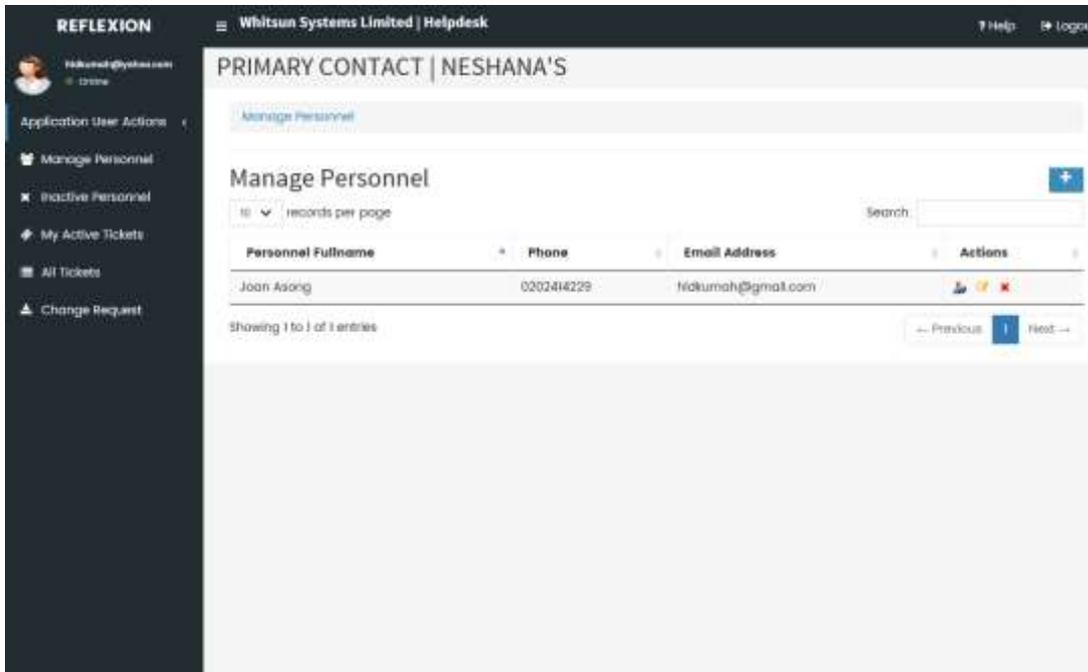


Fig. 9 Primary Contact welcome screen

The personnel, on logging into his account sees all his active tickets. More details on using his account will be explained in the next chapter.

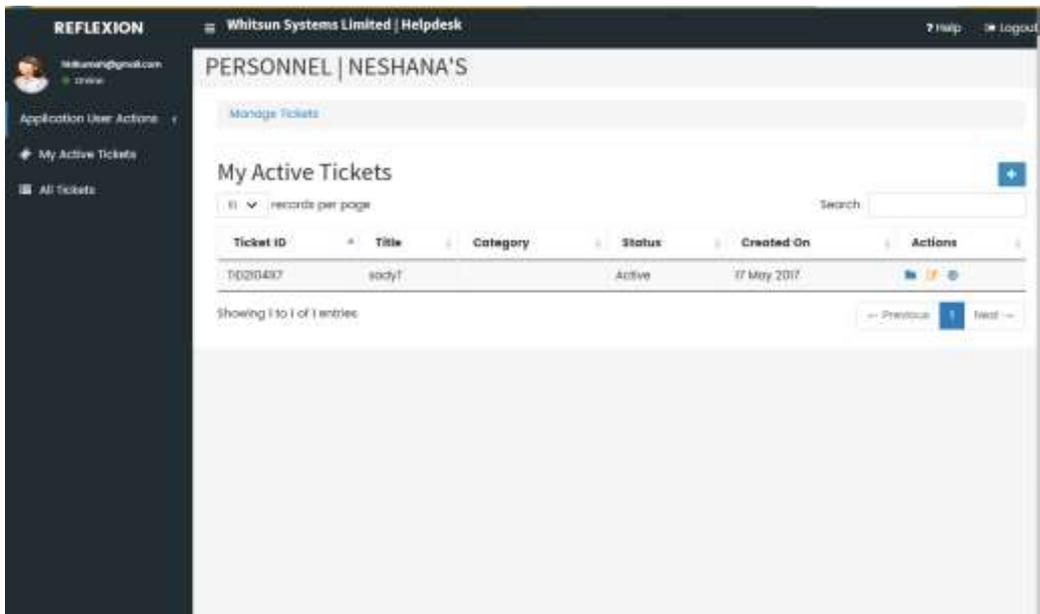


Fig. 10 Personnel welcome screen.

The final role, call centre operator sees the screenshot below as his welcome screen when he logs in. We will go into a lot more detail in the next chapter.

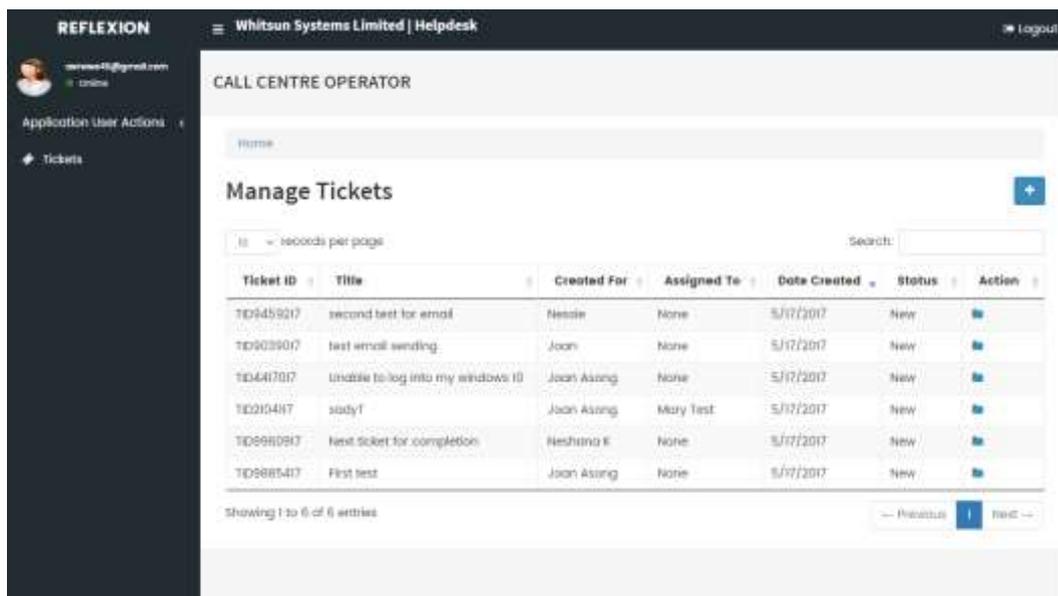


Fig. 11 Call Centre Operator dashboard

### 3.4. Logging out of the Application

To log out of the application, click on the logout button at the top right corner of your screen.

Alternatively, you can click on the application user actions and select logout.

## 4. Usage

This chapter provides information on the usage of the helpdesk system.

### 4.1. Instructions

#### 4.1.1 Customisation

##### Editing Company Settings

To edit the settings of the Company

- Click on settings on the left navigation pane
- Click on the edit settings button
- Make edits and click on the update button

##### Changing Your Password

For all the users, the application user actions can be found on the top left navigation pane, directly below the username (email address)

To change your password:

- Click on the application user actions and select Change Password
- Enter the new password and confirm it
- Click on Update password to effect the changes.

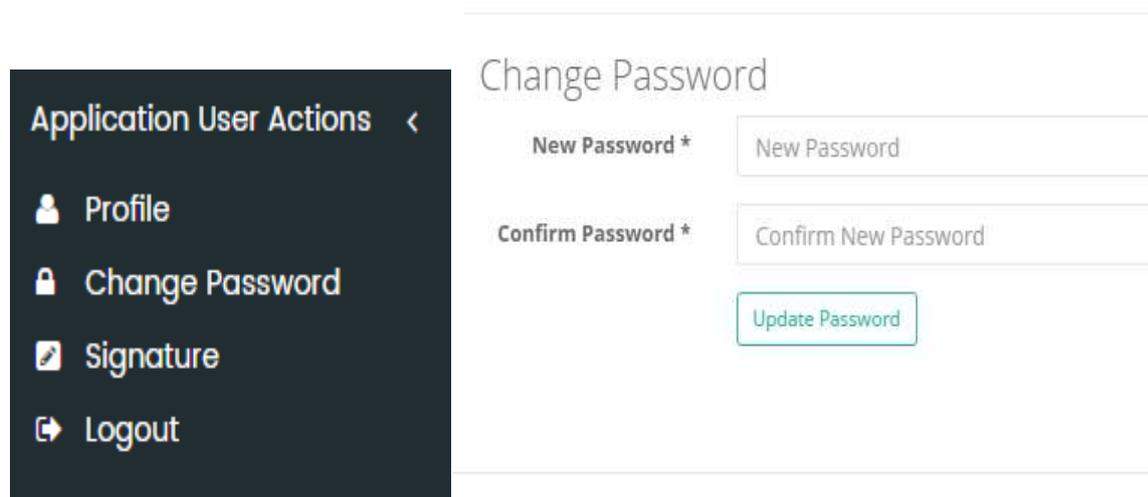


Fig. 12 Change password

You can also use the forgotten password link on the login page as described in the previous chapter.

To make changes to your Profile

- Click on application user actions

- Click on Profile
- Details of your profile appear with an edit button below it. Click on the edit button
- Make desired changes and click on update

### Signatures

Signatures can be added to be appended to emails that are sent to clients. Only the administrator and the engineer can add signatures.

To add a signature,

- Click on Application User Actions and click on Signature
- Click on the New button, add the signature and save.

To edit your signature,

Follow the steps above and instead of the new button, click on the edit button. You can use the menu to add images, links and others.

To create Ticket Categories

- Click on ticket categories
- Click on the add new icon, 
- Enter the category name and save

To edit a ticket category:

- Locate the category within the grid/table
- Click on the edit icon, 
- Make the necessary changes and update

To delete a category:

- Locate the category within the data grid
- Click on the delete icon
- Confirm deletion.

### 4.1.2 User Management

Reflexion has 5 access levels- administrator, engineer, call centre operator, primary contact and personnel. The first 4 roles are created by an admin while the personnel is created by the primary contact.

To create an admin;

- You must be logged in as an administrator
- Click on Administrators on the left navigation pane

- Click on the Add New button
- Fill in the details and click on Add administrator

To delete an admin:

- Locate the particular admin within the grid
- Click on the delete icon under the actions tab
- Confirm deletion.

To create an engineer

- You must be logged in as an administrator
- Click on Engineers on the left navigation pane
- Click on the Add New button, 
- Fill in the details
- To assign multiple categories to an engineer, press and hold the Ctrl button and click on as many categories as wanted
- Click on Add staff

To view the details of an engineer:

- Locate the engineer whose details are to be viewed.
- Click on the view details icon 

Within this view, you can edit the details of an engineer by clicking on the edit details button.

To edit the details of an engineer:

Aside the option talked about just a few seconds ago, you can edit by;

- Locate the engineer to be edited in the data grid
- Click on the edit icon, 
- Make the necessary changes and update.

To delete an engineer:

- Locate the engineer to be deleted
- Click on the delete icon by the name under the actions column
- Confirm deletion

To create a client:

- Click on clients on the left navigation pane
- Click on the add new button,
- Fill in the details and click on Save. The first portion are details of the company and the second portion are details of the primary contact in that company.

Fig. 13 Register new client

You can also create a number of clients at a go by clicking on the import button to import client details from excel.

Client Name	Client Email	Address	Primary Contact Firstname	Primary Contact Lastname	Email	Phone No.
IBM Systems	ibm@whitsunsystems.com	Accra	Dennis	Asamo	dennis@ibm.com	0245893784
IBM Associates	ibm@ibm.com	Accra	Marvin	Etse	marvin@ibm.com	0245893776
Pk and Sons Inc.	pk@pk.com	Accra	Rudra	Douls	pk@pk.com	0237817528
Leap Multimedia Consult.	leap@leap.com	Danzonan, Accra	Falisa Tsoumal	Adde	leap@leap.com	0247693681

Fig. 14 Import client contact from excel.

A typical client management screen looks like the image below. You will notice that the client names are in blue. Clicking on this shows the names of personnel registered within that client. The primary contact can always be changed to be any of the registered personnel within the client. The number of registered personnel within a client are also shown in the grid.

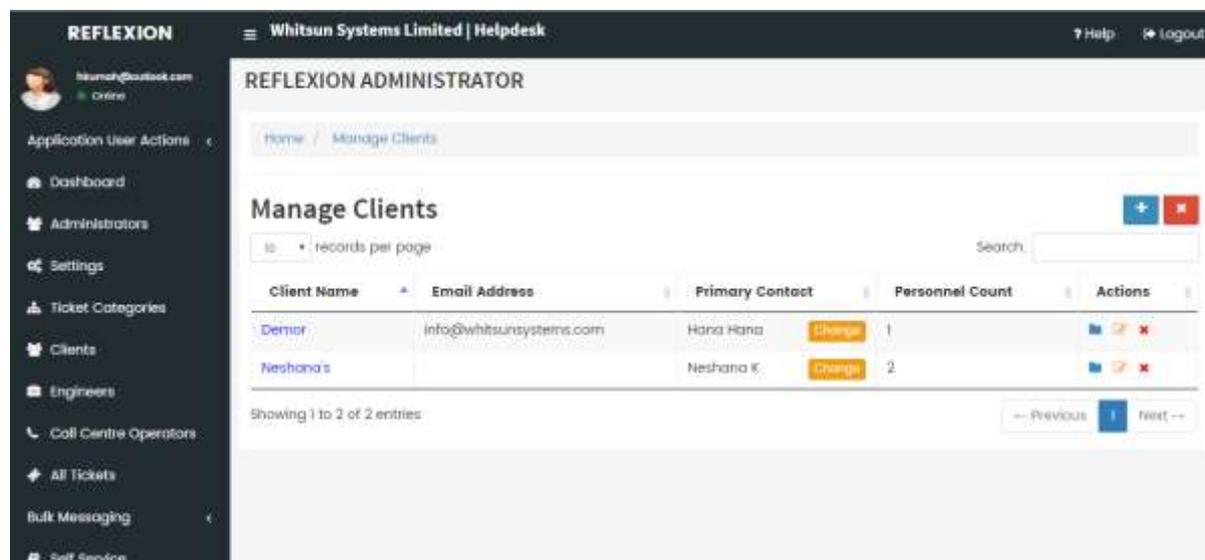


Fig. 15 Client management screen

To change a primary contact

- Locate the client within the grid and click on the orange change button
- Select the option for the type. If to choose from an existing personnel or to register a new person. Follow the instructions as per the type chosen, enter the required details and select how to treat the old manager-whether to deactivate or demote that account.
- Click on save.

The current primary contact can also promote a personnel to primary contact status. To do this,

- You must be logged in as primary contact
- Click on the Manage Personnel on the left navigation pane
- Locate the account/personnel to be promoted and click on the promote icon,  by its name.
- Confirm

It is worth noting that any user that is created or for whom a change is made, an email will be fired to that particular user.

To edit client details:

- Click on the edit icon by the client name
- Make the necessary changes and click on update.

You can equally make the edits by clicking the view details icon,  and clicking on the edit button which appears under the details. The changes added can then be effected by clicking on the update button.

To deactivate a client:

- Click on the deactivation icon, 
- Confirm deactivation by clicking Ok.

Note that doing this will also deactivate all staff within that client.

There are times that a deactivated client needs to be reactivated as business between both parties resume.

To reactivate a client:

Click on  within the Manage Clients page while logged in as an admin.

- This will show you a list of all deactivated clients and the number of personnel that were registered in them.
- Locate the client to activate and under the actions column, click on the activate icon.

To create personnel within a client:

The primary contact is the one that creates personnel. Hence to do this, one needs to be logged in as a primary contact.

- Click on Manage personnel if not already in that view
- Click on add new 
- Enter the details of the employee/personnel and click on add personnel.

You can import multiple personnel data from an excel sheet by clicking on the import data from excel file within the register new personnel modal.

Browse for the file and import.

The excel data should have the following as headers:

- Firstname
- Lastname
- Email
- Phone No.

Ensure that this format is strictly adhered to prevent errors in registration. The phone number must either be in the format 0xxxxxxxxx

To edit personnel:

- Locate the person within the grid and click on the edit icon
- Make the changes and update.

To deactivate personnel:

- Find the person and click on the deactivate button
- Confirm deactivation.

To activate a deactivated personnel:

- Click on the Inactive personnel link within the left navigation pane
- Locate the person to activate and click on the activate button by the name.

#### 4.1.3 Ticket Management

One can create a ticket directly from the front page of [support.whitsunsystems.com](http://support.whitsunsystems.com) or when logged into your account. In the case where you are unable to create, the engineers or the call centre operators can create the ticket for you. Without having an account, one cannot create a ticket on one's own. However if you don't have an account, the call centre operators can still create a ticket for you. In that case, the first person created becomes the primary contact for that company so that an account can be created for the company.

To create a ticket from the support site:

- Click on New ticket on the menu bar
- Enter your account details and click login
- Enter the details of your ticket and if there needs to be a file to be attached, add
- Click on submit ticket.

To create a ticket from your portal:

- Click on My Active Tickets, having logged into your account.
- Click on the new icon,  to add
- Fill in the details and submit

To create a ticket for a client:

This can be done by an engineer or a call centre operator. To create as an engineer,

- Click on Tickets and then the new icon
- Fill in the details of the ticket and select who is requesting the ticket to be created.
- Submit ticket.

To view a ticket (as a primary contact/personnel):

- Click on my active tickets and click on the view details icon.

Within this view, you can edit or close a ticket by clicking on the edit or close button respectively.

To view a ticket as an engineer or admin,

- Click on the ticket name and the details will be shown.

To edit a ticket (as a primary contact/personnel)::

- Click on my active tickets and click on the edit icon by the ticket to be edited
- Make the necessary changes and update.

To close a ticket (as a primary contact/personnel)::

When satisfied with how the ticket has been handled or you decide to close a ticket,

- Click on the close icon,  under the actions column.
- Confirm closure and select a rating
- Send and this closes the ticket.

To reopen a ticket (as a primary contact/personnel):

- Click on All tickets and locate the ticket to be reopened. This can be seen by the open folder icon by closed tickets.
- Enter the comments for reopening the ticket.

## Engineer Ticket Management

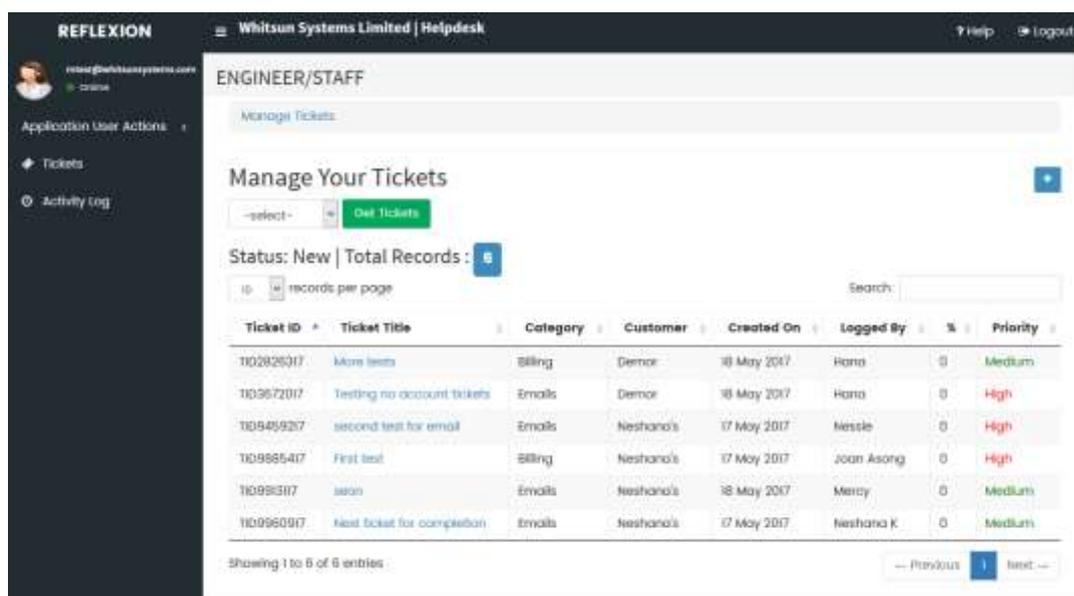


Fig. 16 Manage tickets-Engineer

The engineer sees a dropdown which allows to select tickets from the various states - New, Progress, Completed, Reopened, Closed and All-of all the tickets which have been sent to that particular engineer to work on. All new tickets assigned to the engineer or which are opened in the category that engineer is in are under the New state.

The priority of a ticket can be changed by the engineer by clicking on it and choosing the appropriate one from the dropdown list. Save after the choice is made.

When the engineer starts working on any of the tickets, they move from the New state into the Progress state. Over here, the engineer can edit the percentage of completion and work on the ticket.

Tickets can only be closed by the client that opened it. If a ticket with percentage of completion is 100% (i.e. of complete status) and there is no feedback from the client after 72 hours, the system will automatically close the ticket.

To resolve a ticket:

- Select New from the dropdown and click on Get Tickets.
- Click on the title of the ticket to be worked on
- Having gone through, if you can resolve it, click on the resolve button.
- This will open up a dialog box where the solution can be put and you click on proceed.

Note however that the message you put in the text field will be appended to a system generated email and sent to the client.

Email a client:

If the information provided requires extra detail, you can send an email to the client, by clicking on the email customer button. It is worth noting that if you have a signature set up, it will append it to the email you send to the client. Also note that the email will be sent as exactly as you write with the ticket title and ticket id prepending the message.

Escalate a ticket:

If the ticket details are beyond your scope, you may want to escalate to another engineer. This is done by clicking on the escalate ticket button. This opens up a modal to select the user that can work on the issue at hand.

The new engineer can then go through the processes stated to resolve the issue for the client.

Assigning a ticket to an Engineer:

When a client creates a ticket, emails are sent to all engineers within that category, so when one takes charge of the ticket to resolve, it moves out of the domain of the rest. However, there may be times that no engineer may have taken charge of the ticket and the admin can assign the ticket to an engineer to work on it.

To do this:

- Click on All tickets. There are three tabs with counters by them showing the number of tickets grouped under it.
- Click on the unassigned tab
- For the ticket to be assigned, click on the icon under the action column
- Select from the dropdown an engineer to handle the ticket
- Click on Assign.

You can also click on the title of the ticket to open the details of the ticket. From this view, you can click on the Assign to Staff button and select an engineer from the dropdown to assign to.

Adding a solution to the knowledge base/self-service:

Having solved the issue for the client, it is likely that somebody else might encounter the same problem and in order not to reinvent the wheel, these are put in a knowledge base and published in the self-service portal. The engineer can only add a solution to the knowledge base but with it getting onto the self-service portal, that power lies with the admin.

To add a solution:

- Within the tickets page, select the closed state and click on Get Tickets.
- Solutions that have not yet been added to the knowledge base will have the add solution button. Click on it
- Enter the solution for that particular ticket. You can insert images and videos in the solution or any other document file. To add a video URL from a video site into the video URL field instead of adding it straight within the solution text area, ensure you copy the URL within the embed tab in share (as is in YouTube). This will embed the video into the solution.
- Click on add solution.

To view a solution:

- Click on the view solution button, while within the closed tickets page.

Within this view, you can edit the solution by clicking on the edit button. After making the necessary changes, click on update solution.

#### 4.1.4 Self Service

As discussed in the previous section, self-service helps with finding a solution before creating a ticket. The solutions that have been created from previous tickets are put out within the self-service portal to be accessible to all. One can also add up a whole new topic within the self-service portal. These actions can only be performed by the administrator.

To add a solution of a closed ticket to self-service:

This is premised on the engineer adding the solution to the closed ticket.

- Hence within the admin portal, click on All Tickets and click on the closed tab
- All closed tickets that have a folder icon under the actions tab have solutions that can be added to self-service
- Click on the icon and it will open up the solution.
- Click on Add to self-service
- Add tags to the article separated by commas. You can add as many tags as you want.
- Click on Add

To add a new article in self-service:

- Click on self-service, while logged in as admin
- Click on the new article icon, 
- Enter the details in the fields. Add a solution file if there is or a video URL if there is, i.e. if you do not want to embed the video within the text but want it at the end of the article. Enter the tags separated by commas
- Add

To view an article:

- Click on the detail icon by the particular article to view

Within this view you can click on the edit button to make changes.

To edit an article:

- Click on the edit icon by the article
- Make the necessary changes and
- Update

To deactivate an article/remove from the self-service portal:

- Click on the deactivate icon by the article
- Confirm deactivation

To activate a deactivated article:

- Click on the deactivate icon, 
- Locate the article to activate and click the activate icon under actions.

#### 4.1.5 Call Centre Operators

This role mainly is about ticket management and interfaces with clients. The call centre operator creates tickets and tracks the progress of all tickets for clients who call/enquire about how their ticket issue is faring.

To create a ticket for a client:

- Ensure that you are logged in as a call centre operator
- Click on the new ticket icon
- Fill in the details. In the case where the company doesn't exist already, you can enter the company name in the new company name text box.
- Submit ticket.

To view ticket tracking details

Click on the folder icon by the ticket which you want to view the details. It shows a list with the latest item on top for all transactions that have been done on that ticket.

You can download the details by clicking on the download button.

#### 4.1.6 Bulk SMS

In the event where it becomes necessary to send SMS to all clients, this feature comes handy. It allows to send SMS to different categories- all personnel and managers (primary contacts), managers only, personnel, specific company members and selected individuals. This feature is only available for admin.

To send SMS,

- Click on Bulk Messaging and select SMS
- Select the category from the dropdown and select those to receive
- Enter the text message. Note that the message must not exceed 160 characters.
- Send SMS

To view SMS history:

- Click on Bulk SMS
- Click on SMS History

#### 4.1.7 Bulk Emailing

There may be situations where you may want to send emails to all your clients within Reflexion and you would want it to appear as the mails were sent on an individual basis (as in mailing lists). Reflexion provides that feature which reduces the stress of having to send out emails individually. This feature provides the option to send to all personnel and managers (primary contacts), managers only, personnel, specific company members and selected individuals. This feature is only available for admin.

To send bulk Email,

- Click on Bulk Messaging and select Email
- Select the category from the dropdown and select those to receive
- Enter the message. If there is a file to be attached, you can browse for it by clicking on the choose file button. The file cannot exceed 2MB.
- Select the header (or the address which should be the sending address)
- Send message.

#### 4.1.8 Activity Logs and Reports

Activity and system logs are kept by Reflexion to serve as an audit trail. These keep a record of every activity and who did what. The activity log is present in each role as this records what one does. This also serves as a security measure in the situation whereby the user may not recall an action recorded as being executed. This shows the account may have been tampered with. In that case the person can change password or take actions against further breaches. It also serves as a means of audit.

To view activity log:

- Click on My Activity Log

This loads the latest 20 actions of the user. You can however search or filter with dates.

The system log keeps a record of all important activities of all users on the system. This provides control and allows the administrator to have a view of everything happening on the system.

To view system log:

- Click on system log.

This also functions like the activity. It adds to the activity description and the date, the user who performed that activity.

To view a report:

- Click on Report within the left navigation pane in the admin portal
- Per the report you want to view, select from the combo boxes available-ticket status, category, engineer, client and priority
- In the event where the report is needed for a specific time frame, select start and end dates
- Click on Get report.

You can export the report to either PDF or Excel format and download onto your machine.

## 4.2. Messages

The main mode of communication is through emails. From registration, password changes, change in role, ticket creation through the process of management to closure, emails are sent between the various users of the system.

SMS is another mode of communication but this is not automated as the emails. This is user-initiated.

## 4.3. Change Request

In the situation where the primary contact for a client want changes to an application which is already deployed/running, he/she can fill out a change request form and send to Whitsun to process. This change request form is available only within the primary contact portal.

To access it

- Click on the change request link on the left menu
- Click on the download button
- This opens it in a new tab.

Save or print out to make the edit and to send to us.

## 5. Appendix

### 5.1 Key to Images

Icon	Meaning
	Edit
	View details
	Deactivate
	Delete
	Add new
	Deactivated clients/articles
	Close a ticket

## 6. Index

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