

# Sales Operations Manual

## OneTickets

Vijaysagar Reddy

Version 1.0



## Version History

Date	Version	Description	Author
Feb 06, 2012	1.0	First Draft	Vijaysagar Reddy

## Contents

1 Introduction .....	5
2 Ticket Fields.....	5
2.1 Component/s or Category .....	10
2.2 Summary: .....	11
2.3 Regional Manager: .....	11
2.4 Assignee .....	11
2.5 Attachment .....	11
2.6 End Customer.....	11
2.7 Customer Email Address .....	11
2.8 Order Received On .....	11
2.9 PO Number.....	11
2.10 Partner .....	11
2.11 Project Name .....	11
2.12 Description.....	12
2.13 Priority.....	12
2.14 Labels .....	12
2.15 ID .....	12
2.16 Creation Date .....	12
2.17 Requester/Reporter .....	12
2.18 Link .....	12
2.19 Assign .....	13
2.20 Assign to me.....	14
2.21 Add comment: .....	14
2.22 Attached file.....	14
2.23 Attach screenshot .....	15
2.24 Watch Issue/Subscribe.....	15
2.25 Clone .....	15
2.26 Audit.....	15
3 Alter a ticket and workflow.....	15
3.1 Status changes for tickets related to SOO(Sales).....	16
3.2 Status changes for tickets related to SOT .....	17
3.3 Workflow for Sales-Operations-Ticketing (SOT): .....	18

3.4 Workflow for Sales-Operations-Order-Entries-(Admin) .....	19
3.5 Workflow for Sales-Operations-Order-Entries-(Sales).....	20
4 User Management .....	21
5 Reporting.....	21
6 General Features.....	21
6.1 Filtering .....	21
6.1.1 Search for Issues: .....	21
6.1.2 Create a filter: .....	24
6.1.3 Create a filter .....	25
6.1.3.1 Rename or Share for filter .....	25
6.1.3.2 Creating a new filter from existing filter .....	26
6.1.3.3 Subscriptions for filter.....	26
6.2 Manage Filters .....	27
6.2.1 Favorite Filters .....	27
6.2.2 My Filters .....	27
6.2.3 Popular filter .....	28
6.2.4 Search filter .....	28
6.2.5 Search for all tickets.....	28
6.3 Export the search results and configure the columns .....	28
6.3.1 Views.....	28
6.3.2 Tools.....	29
7. Dash Board.....	29
7.1 Dash Board .....	29
7.2 Projects .....	29
7.3 Issues.....	30
8. Browse Projects .....	31
8.1 Summary: .....	31
8.2 Issues.....	31
8.3 Components:.....	32
8.4 Labels: .....	32

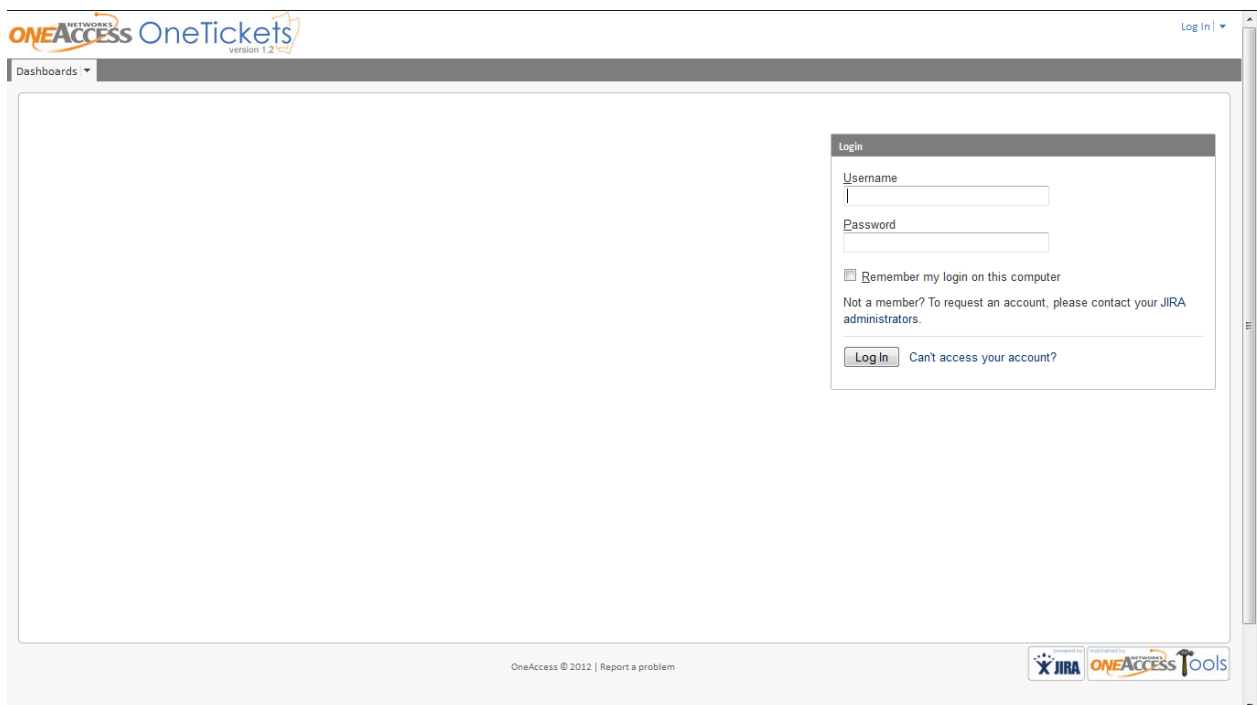
## 1 Introduction

This manual is intended for users of the OneAccess OneTickets Sales Operations ticketing Project. In the chapters below it explains the different elements of a ticket, the workflows scheme, the permission settings and user profiles. It graphically elicits the various options/features that a user has to interact with the system.

Administration of OneTickets is not covered by this document. Administration is currently taken care of by the OneAccess Tools Team.

## 2 Ticket Fields

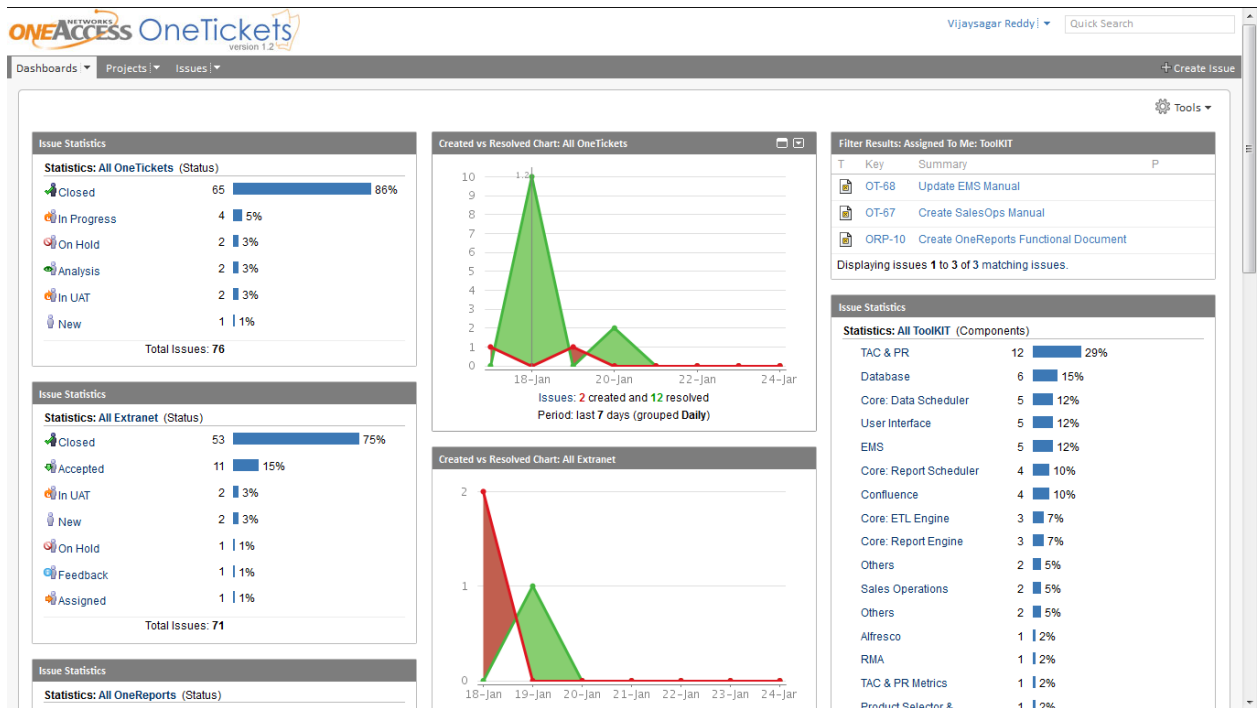
Login to the Jira by typing the 'http://oab1jira//' url in the address bar and the user will get the following page.



The screenshot shows a web browser window displaying the OneAccess OneTickets login interface. The page has a header with the 'ONEACCESS OneTickets version 1.2' logo and a 'Log In' dropdown menu. Below the header is a 'Dashboards' dropdown. The main content area is a large white box. On the right side of this box is a 'Login' form. The form includes a 'Username' field, a 'Password' field, a checkbox for 'Remember my login on this computer', and a 'Log In' button. Below the checkbox, there is a link that says 'Not a member? To request an account, please contact your JIRA administrators.' and a link that says 'Can't access your account?'. At the bottom of the page, there is a footer with the text 'OneAccess © 2012 | Report a problem' and logos for 'JIRA' and 'ONEACCESS Tools'.

Enter the Windows Username, Password (as an interface with the One Access MS Active Directory is configured with Jira) and click on the Log In button.

After successful login user will get the following page.



Clicking on the Create Issue link user will be able to see a small popup window, in that user will be able to see two projects as follows:

1. Sales Operations Order Entries(SOO)
2. Sales Operations Ticketing(SOT)

### 1. Sales Operations Order Entries (SOO)

User with SO Sales and SO Sales Operations access: In popup select the Project as 'Sales Operations Order Entries' and Issue type as 'Order Entry (Sales)' (the screen will appear as follows)

The 'Create Issue' popup window contains the following fields and buttons:

- Project:** A dropdown menu with 'Sales Operations Order Entries' selected.
- Issue Type:** A dropdown menu with 'Order Entry (Sales)' selected.
- Create** button (highlighted in blue).
- Cancel** button.

Clicking on the Create button user will get the following screen.

Dashboards ▾ Projects ▾ Issues ▾ + Create Issue

### Create Issue

Project: **Sales Operations Order Entries**

Issue Type: **Order Entry (Sales)**

Component/s:  Start typing to get a list of possible matches or press down to select.

Summary:

Regional Manager: **None** Name of the regional manager of the reporter

Assignee: **- Automatic -** [Assign To Me](#)

Attachment:  The maximum file upload size is 500.00 MB.

End Customer: **None** Name of the End Customer or New.

Customer Email Address:

Order Received On:  Date of the order (ie receipt of the fax, ie NOT the date mentioned on the fax or similar)

PO Number:  Number of the PO

Partner: **None** Name of the Partner (for existing partners) or New.

Project Name:  Name of the project

Description:

Labels:  Begin typing to find and create labels or press down to select a suggested label.

[Cancel](#)

After entering all mandatory fields user will get the following screen.

Details

Type: **Order Entry (Sales)**  
Priority: **Major**  
Component/s: **Standard order entry**  
Labels: **None**  
Regional Manager: **Others/New**  
End Customer: **Others/New**  
Project Name: **Project Name testing**

Status: **New (View Workflow)**  
Resolution: **Unresolved**

People

Assignee: **so-sales-operations**  
Reporter: **so-sales**  
Participants: **so-sales, so-sales-operations**  
[Watch \(0\)](#)

Dates

Created: **Today 07:56 AM**  
Updated: **Today 07:56 AM**

**Sales Operations Order Entries / SOO-21**  
**Testing the application**

Edit Assign Assign To Me Comment More Actions ▾

**EXT-11.jpg**  
65 kB 17/Jan/12 07:56 AM

**EXT-11-1.jpg**  
67 kB 17/Jan/12 07:56 AM

**EXT-11-2.jpg**  
67 kB 17/Jan/12 07:56 AM

**EXT-11-3.jpg**  
67 kB 17/Jan/12 07:56 AM

Activity

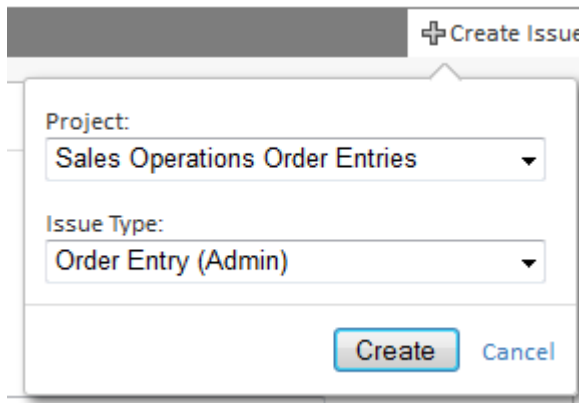
All Comments History Activity

There are no comments yet on this issue.

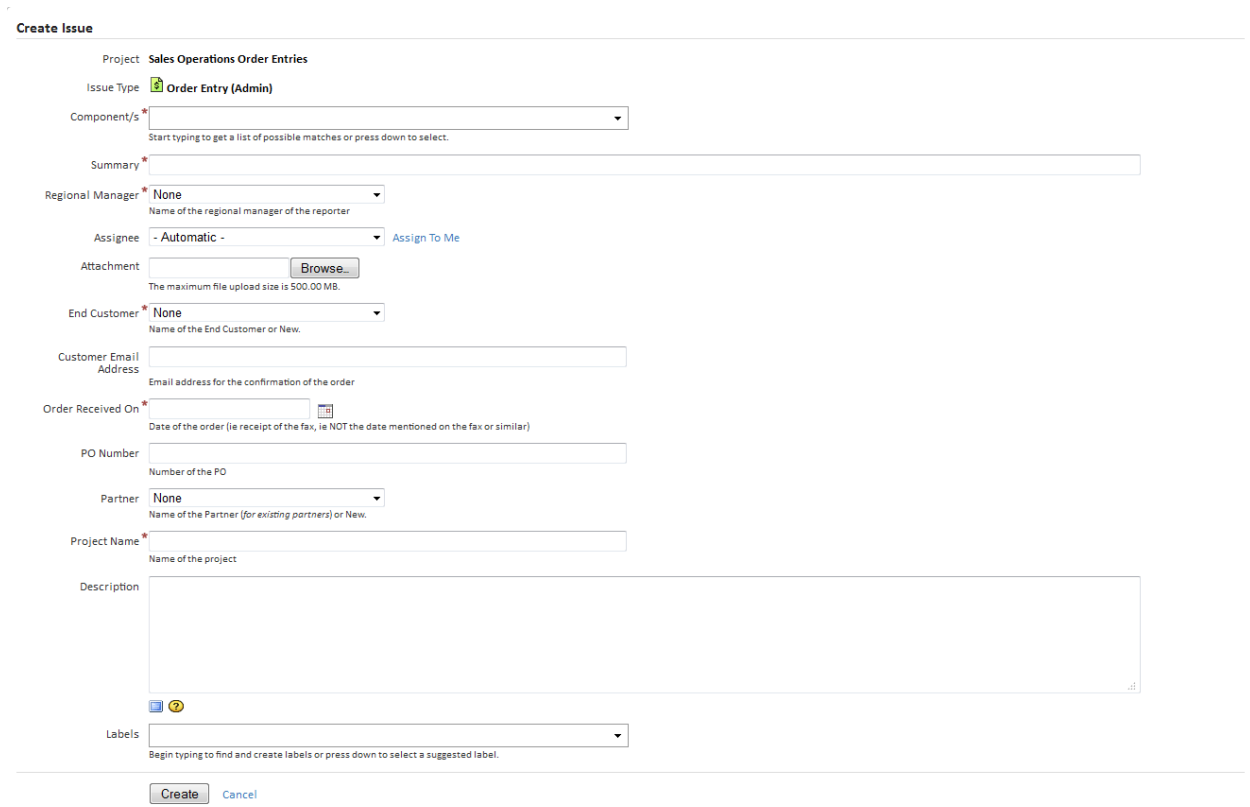
If user selects the Project as 'Sales Operations Order Entries' and Issue type as 'Order Entry (Admin)' user will get the following error message.

**“so-sales,** This issue type is for sales admins only. Please create an order entry by selecting the issue type 'Order Entry (Sales)'.”

User with SO Sales admin access: In popup select the Project as 'Sales Operations Order Entries' and Issue type as 'Order Entry (Sales)' (the screen will appear as follows)



Clicking on the Create button user will get the following screen.



After entering all mandatory fields user will get the following screen.



Search by text or tags by typing a name (name, tag, or email) into the search bar

Dashboards ▾ Projects ▾ Issues ▾ + Create Issue

Sales Operations Order Entries / SOO-22

## Summary test

[Edit](#) [Assign](#) [Assign To Me](#) [Comment](#) [More Actions ▾](#) [Update Admin Checks](#) [Workflow ▾](#) [Views ▾](#)

**Details**

Type:	Order Entry (Admin)	Status:	New (View Workflow)
Priority:	Major	Resolution:	Unresolved
Component/s:	Standard order entry		
Labels:	None <a href="#">✎</a>		
Regional Manager:	Others/New		
End Customer:	Others/New		
Project Name:	Summary Project		

**People**

Assignee: [so-sales-operations](#)  
 Reporter: [so-order-admin](#)  
 Participants: [so-order-admin](#), [so-sales-operations](#)  
[Watch \(0\)](#)

**Dates**

Created: Today 08:35 AM  
 Updated: Today 08:35 AM  
 Order Received On: 15/Jan/12 8:26 AM

**Activity**

[All](#) [Comments](#) [History](#) [Activity](#)

There are no comments yet on this issue.

[Comment](#)

If user selects the Project as 'Sales Operations Order Entries' and Issue type as 'Order Entry (Sales)' user will get the following error message on the screen.

**"So-order-admin, This issue type is for sales peoples only. Please contact your administrator."**

## 2. Sales Operations Ticketing (SOT)

Any user login with so-sales group can ask everything else to the sales team by using the Issue type as Ticket. User with so-sales group access: In popup select the Project as 'Sales Operations Ticketing' and Issue type as 'Ticket' (the screen will appear as follows)

+ Create Issue

Project:  
Sales Operations Ticketing ▾

Issue Type:  
Ticket ▾

[Create](#) [Cancel](#)

Clicking on the Create button user will get the following screen.

**Create Issue**

Project: Sales Operations Ticketing

Issue Type: Ticket

End Customer: **None**  
Name of the End Customer or New.

Reporter: **admin**  
Start typing to get a list of possible matches.

Component/s:   
Start typing to get a list of possible matches or press down to select.

Summary:   
Description:

Assignee: **- Automatic -** [Assign To Me](#)

Priority: **Major**

Labels:   
Begin typing to find and create labels or press down to select a suggested label.

Linked Issues: **blocks**   
Begin typing to search for issues to link. If you leave it blank, no link will be made.

Attachment: [Browse...](#)  
The maximum file upload size is 500.00 MB.

[Create](#) [Cancel](#)

After entering all mandatory fields user will get the following screen:

Sales Operations Ticketing / SOT-3

**Just testing**

[Edit](#) [Assign](#) [Assign To Me](#) [Comment](#) [More Actions](#)

**Details**

Type: Ticket  
Priority: Major  
Component/s: [Loan Request](#)  
Labels: **None**

Status: [New \(View Workflow\)](#)  
Resolution: **Unresolved**  
Security Level: **Sales Ops Default Security Level**

End Customer: **ATOSOF-France**

**People**

Assignee: [Emma Richardson](#)  
Reporter: [OneTicketing Administrator](#)  
Participants: [Emma Richardson ... \(1\)](#)  
[Watch \(0\)](#)

**Dates**

Created: **Today 07:40 AM**  
Updated: **Today 07:40 AM**

**Description**

Description

**Activity**

[All](#) [Comments](#) [History](#) [Activity](#)

There are no comments yet on this issue.

[Comment](#)

Details of the fields are as follows.

## 2.1 Component/s or Category

Users need to select the value from the dropdown based on the category.

For Sales Operations Order Entries (SOO) project:

Component	Description
Standard order entry	An order entry is requested by an OneAccess employee.

For Sales Operations Ticketing (SOT) project:

Component	Description
Export License	An export license is requested.
NS Price Offer	Default non-strategic price offer request.
Loan Request	Request for a loan
New Customer	A new customer needs to be created in the OA systems.
Other	Any other request towards Sales Operations

## 2.2 Summary:

It's a text field and user needs to enter the ticket summary.

## 2.3 Regional Manager:

User needs to select the 'Name of the regional manager of the reporter' from the dropdown.

## 2.4 Assignee

User needs to select assignee from the dropdown. If user is not selecting any assignee while creating a ticket warning message will display as follows: The default assignee does NOT have ASSIGNABLE permission OR Unassigned issues are turned off. Hence user needs to select a assignee from the dropdown.

## 2.5 Attachment

User can attach Files of any file type up to 500MB. To attach any file click on the Browse button, select the file which user want to upload and Click on Open button. User is able to see the attached file name above the text field.

## 2.6 End Customer

User need to select Name of End Customer or New from the dropdown.

## 2.7 Customer Email Address

User can enter the customer Email address for the communication of the order.

## 2.8 Order Received On

User needs to select the date from the calendar (i.e. Date of the order (i.e. receipt of the fax, i.e. NOT the date mentioned on the fax or similar)).

## 2.9 PO Number

User can enter the PO number in the PO number text field.

## 2.10 Partner

User can select a Name of the Partner (for existing partners) or New from dropdown. Only required for order entries from partners.

## 2.11 Project Name

User can enter the Name of the project into the field name called 'Project Name'

## 2.12 Description

Description filed is a text field where the reporter describes in some sentences what the nature of the problem the faced.

## 2.13 Priority

Based on the type of the problem EMS/OA user need to select the value from dropdown. Default will be Major.

Name	Description	Guidelines
Blocker	Requires action asap	Given the impact, this is critical and requires action asap.
Critical	Severe Impact	This in has a severe impact, fast resolution is required
Major	Major Impact	Normal problem
Minor	Minor Impact	Minor impact or other problem where easy workaround is present
Trivial	Trivial	Not used

## 2.14 Labels

Users have an option to select a label from dropdown or user can create a new label and created one will be tagged to the ticket.

## 2.15 ID

Once user filled all mandatory fields and clicking on the create button user will get the unique number which identifies the order entry.

## 2.16 Creation Date

After creating a ticket user will able to see the Creation Date in the ticket. Date will appear in GMT+1

## 2.17 Requester/Reporter

Requestor/Reporter of the ticket and will be displayed in ticket once user created a ticket.

## 2.18 Link

User can link a ticket with another ticket. This workflow is action to avoid one need to duplicate the content of another ticket entirely in case the other ticket has been closed (or is only similar).

User can select the type of link from the 1st dropdown and issues can be selected from 2nd dropdown (or) user can enter the ticket numbers in the 2nd column.

Once the ticket is created successfully the page will appear as follows:

The screenshot shows the 'Summary' page for issue OAB-1 in the OneAccess OneTicketing system. The page is divided into several sections:

- Navigation:** Dashboards, Projects, Issues, and a '+ Create Issue' button.
- Breadcrumbs:** OneAccess Belgium (EMS) >> OneAccess / OAB-1.
- Summary Section:** Includes tabs for Comment, Attach Files, Attach Screenshot, and More Actions. It also shows a 'Views' dropdown.
- Details:**
  - Type: Ticket
  - Priority: Major
  - Component/s: DR Definition
  - DR: 11,111
  - SAP Ref Component: mother board
  - Product Code/Name: 40021 / V28DTE
  - Criticality: Unknown
- People:**
  - Assignee: Vijaysagar Reddy
  - Reporter: Test OAB
  - Participants: Test OAB, Vijaysagar Reddy
  - Vote (0)
  - Watch (0)
- Dates:**
  - Created: Today 10:20 AM
  - Updated: Today 10:20 AM
- Description:** A section for the issue description.
- Activity:** Includes tabs for All, Comments, History, and Activity. It states 'There are no comments yet on this issue.' and has a 'Comment' button.

At the bottom, there is a footer with 'OneAccess Merlin © 2011 | Report a problem' and logos for JIRA, ONEACCESS, and Tools.

## 2.19 Assign

1. Click on the Assign button.
2. In the popup select the assignee from the dropdown select the assignee from the dropdown or click on the link 'Assign To Me'
3. Enter the comments in comment field if required and click on Assign button

The screenshot shows the 'Assign' dialog box. It contains the following elements:

- Assignee:** A dropdown menu with 'Test Cofidur' selected. To its right is a link labeled 'Assign To Me'.
- Comment:** A large text area for entering comments.
- Viewable by:** A dropdown menu currently set to 'All Users'.
- Buttons:** 'Assign' and 'Cancel' buttons at the bottom right.
- Shortcut tip:** A message at the bottom left stating 'Shortcut tip: Pressing a also opens this dialog box'.

## 2.20 Assign to me

Click on the Assign to me tab users should be able to assign the tickets for themselves.

## 2.21 Add comment:

Clicking on the 'Comment' button, a user can add a comment. A comment can be added to a ticket. A comment consists of at maximum 512 ASCII characters. HTML and other formatting is not required. Comments are visible to all users who have access to the system. All will have access to add comments to a ticket.

Note: The user who ever commented on the ticket will get the mail notification whenever any comment is added to the ticket.

## 2.22 Attached file

More Actions: Attached file (More Actions => Attached file): Click on the Attach Files link, in the popup. Browse the attachment, enter the comments if required and click on attach. Files of any file type up to 500MB can be uploaded.

**Attach Files**

Attachment ☒ OA sales ops.png  
ONE ACCESS  
SALES OPS

☒ OneTicket.jpg  
ONE ACCESS  
TOOLKIT

The maximum file upload size is 500.00 MB.

Comment

Viewable by All Users

Delete attachment: User with delete permission access can delete the attachment.

An attachment can be deleted. This file can no longer be downloaded. Go to the Attachments link the ticket => Select the dropdown next to the '+' mark => Click on 'Manage Attachments' link=> In the result page click on the Delete icon => in the confirmation page click on the 'Delete' button.

In the Result page click on the Back to Issue tab => Observe the result page=> Result: Deleted attachment won't appear in the ticket.

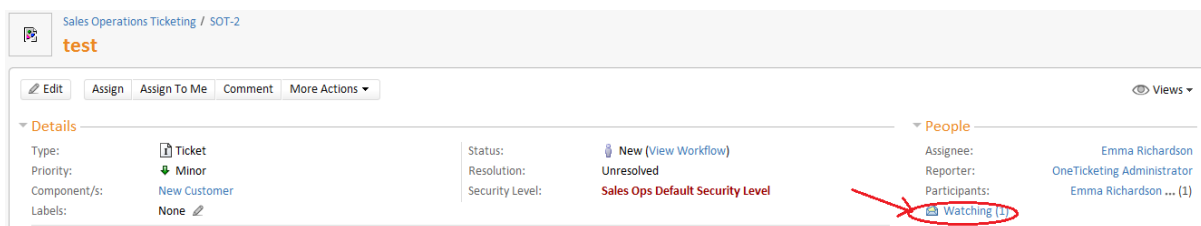
## 2.23 Attach screenshot

More Actions: Attach screenshot (More Actions => Attach Screenshot): Paste the screenshot in the result page.

## 2.24 Watch Issue/Subscribe

More Actions: Watch Issue / Subscribe: (More Actions => Watch Issue) Click on the Watch Issue & observe the watching icon as follows as (i.e. user who was opted for this option will get the mail notification for all changes)

To stop watching click on More Actions=> Stop Watching/ Unsubscribe:



Note: The user who ever click on the watch link on the ticket will get the mail notification.

## 2.25 Clone

More Actions: Clone :( More Actions => Clone) Clone is used to create a new ticket with the existing ticket. Users: Reporter of the existing ticket can create a new ticket by using the Clone.

Click on Clone link, in the popup change the summary if required (if required check the option to clone attachment also) and click on clone button. New ticket will be created successfully with the existing ticket fields.

## 2.26 Audit

Open the ticket=>Observe the 4 tabs: All, Comments, History and Activity => Click on the tab to view the history of the ticket

All: All workflow actions are audit logged i.e. any user that has access to the ticket can see all workflow actions combined with the timestamp of the transition as well as the user who performed the workflow transition.

Comments: Only comments will display in the comments tab.

History: All the actions will be tracked in the History tab (i.e. attachments added/deleted, Issue status changes, linking, cloning and all actions will be tracked in this tab)

Activity: Which user perform which task, tasks performed by specific user will display next to them.

## 3 Alter a ticket and workflow

The workflow is depending on the initial reporter of the ticket and the type of project.

### 3.1 Status changes for tickets related to SOO(Sales)

From step	Transition	To Step	By	Description
-	Create an order entry	Assigned	SO Sales Or SO Sales Operations	A OA employee creates an order entry. (= requester)
Assigned	Re-Assign	Assigned	SO Sales Operations	The ticket gets assigned to a responsible within OA Sales Operations.
Assigned	Request Info	More Info Required	Assignee within SO Sales Operations	OA is missing some information in order to process the order entry.
Assigned	Review	Complete	Assignee within SO Sales Operations	The order entry is complete (contains all necessary information)
Complete	Confirm	Confirmed	SO Order Admin	The order entry has been processed by Order Admin and an estimated delivery time is made.
Confirmed	Communicate	Communicated	Assignee within SO Sales Operations	Communicate Delivery Time estimate (to customer or to account manager).
More Info Required	Provide Info	Assigned	Requester within SO Sales Or SO Sales Operations	Provide more information
Communicated	Request Update Delivery Time	Update Delivery Time	SO Sales Or SO Sales Operations	Request an update about the delivery time.
Update Delivery Time	Provide update	Communicated	Assignee within SO Sales Operations	Provide an update about the delivery time.
Update Delivery Time	Request Manuf. update	Manuf Status Update	Assignee within SO Sales Operations	Request an update about the delivery time.
Manuf Status Update	Provide Manuf.update	Update Delivery Time	SO Manuf	Provide an update about the delivery time.

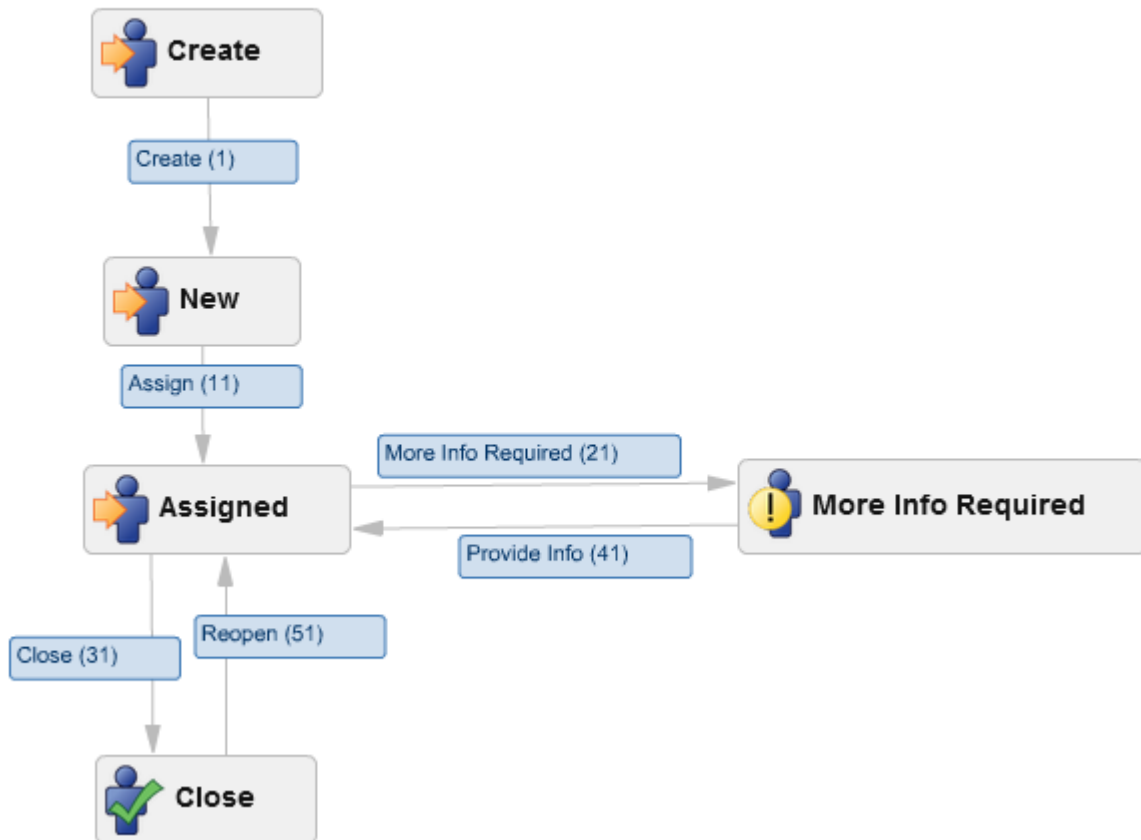


### 3.2 Status changes for tickets related to SOT

From step	Transition	To Step	By	Description
-	Create a request	Assigned	SO users	A new request is created.
Assigned	Assign	Assigned	SO Sales Operations	The ticket gets assigned to a responsible within OA sales operations.
Assigned	Further Info Required	More Info Req.	<i>Assignee within</i> SO Sales Operations	OA is missing some information in order to process the request.
Assigned	Close	Closed	<i>Assignee within</i> SO Sales Operations	The request has been handled entirely and can be closed.
Closed	Reopen	Assigned	<i>Requester within</i> SO-users	The request has not been handled satisfactory.
More Info Req.	Provide Info	Assigned	<i>Requester within</i> SO-users	Provide requested info

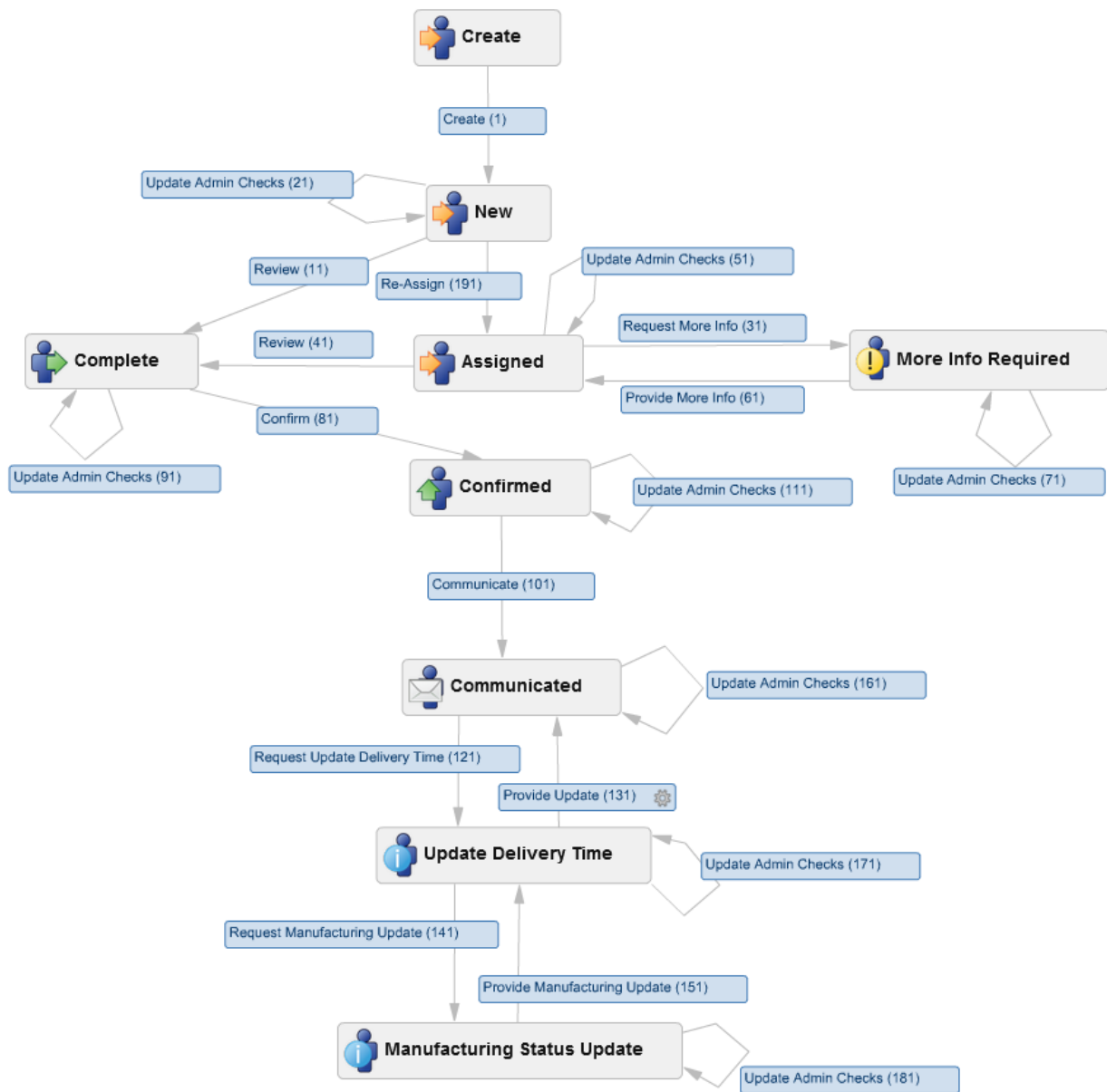
### 3.3 Workflow for Sales-Operations-Ticketing (SOT):

#### Sales Operations Ticketing(SOT) Entries Workflow



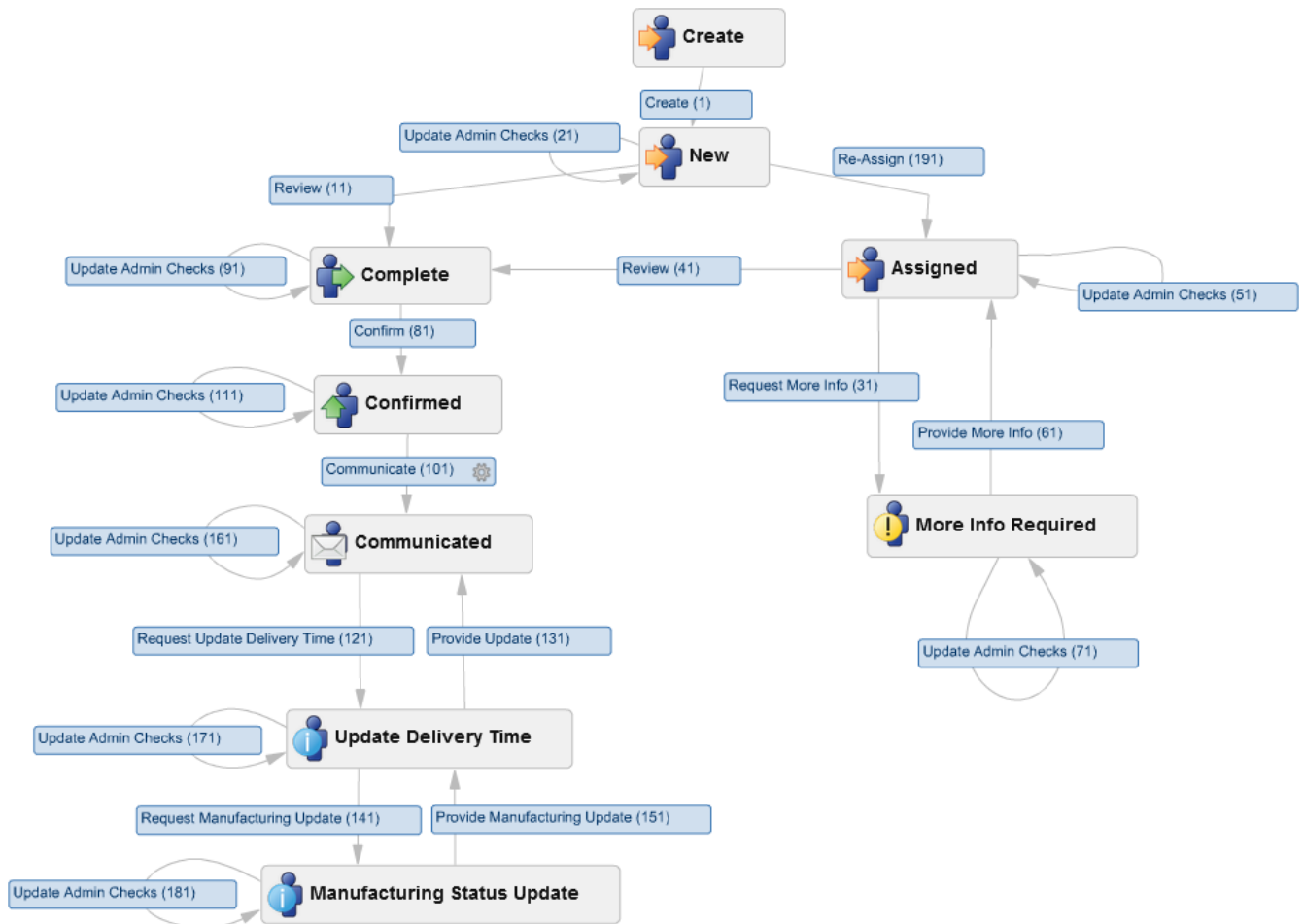
### 3.4 Workflow for Sales-Operations-Order-Entries-(Admin)

#### Sales Operations Order Entries (Admin) Workflow



### 3.5 Workflow for Sales-Operations-Order-Entries-(Sales)

#### Sales Operations Order Entries (Sales) Workflow



Note: The “Order Admin” users will be able to see the additional action tab called “Update Admin checks” by clicking on that user will get the following list of check boxes and can only change by the “Order Admin” users.

Label	Usage
Sold to address is correct in SAP	The "Sold to address" is correct and present in SAP.
Ship to address is correct in SAP	The "Ship to address" is correct and present in SAP.
Bill to address is correct in SAP	The "Bill to address" is correct and present in SAP.
Customer Name ok	The Customer Name is present or, for new customers, has been approved and created.
Product codes ok	The product codes are ok.
Pricing ok	The pricing is ok and in line with price lists, discounts and approvals.
Default payment terms	Default payment terms are applicable or non-default payment terms have been approved.
Software codes ok	The software codes are ok.

Sales assignment ok	This is in line with the target account list.
Finance Check ok	This account is not on hold or CFO approved this order explicitly.
Confirmation by fax done	Check this box in case a customer email address is missing and the confirmation has been done by fax.
Export License ok	An export license is not needed or has been arranged.

## 4 User Management

Sales persons can only see the tickets related (=created) to them. Sales operations and Order Admin users have access to view all tickets.

All user management related tasks can be requested by the OneAccess Helpdesk system (SysAid). Initially this setup will be present.

Project Role Name	Description
SO Sales	Sales persons
SO Sales Operations	People active within sales operations
SO Sales Operations Supervisor	People assigning tickets
SO Order Admin	Does the order administration. This is NOT a JIRA administrative role.
SO-users	All employees that have access to Sales Operations ticketing projects
SO Manufacturing	People within Manufacturing department

Note: The open names (TBC) will be specified during the project roll out.

## 5 Reporting

Reports are currently out of scope for Phase 1. However, a user can generate KPI reports by filtering the required data, exporting it to Excel and then calculating on or aggregating the exported data.

## 6 General Features

### 6.1 Filtering

#### 6.1.1 Search for Issues:

Go to Issues => Search for Issues: User will redirect to Issue Navigator page.

In the result page 3 tabs will appear (Summary, New and Manage) in the left pane.

**Search:** Search tab will present with 'Create new' link. Clicking on the Create new link it will direct to the New tab and the tab page details as follows:

**New:** New tab will present with Switch to 'advanced' searching. Clicking on the advanced link the text link present in the New tab the text changes as follows: Switch to simple searching. (if u have already selected for simple search user will get a link saying that History dropdown with the searched query, clicking on the searched query user will direct to Edit tab which will be created newly)

**Simple Search:**

Users can search the tickets based on the any of the fields which are present in the Issue Navigator=>left-pane. (Login to Jira=> Horizontal Navigation =>Search for Issues => User will direct to default Issue Navigator page.)

## Issue Navigator

Summary New Manage

Switch to [advanced](#) searching

You do not currently have a search or filter selected.

Search

Query



☒ Summary

☒ Description

☐ Comments

Project

- OneAccess Belgium (EMIS) >> C
- OneIntranet
- OneTickets
- Sales Operations Order Entries**
- Sales Operations Ticketing
- Videonon >> OneAccess

Issue Type

- Any
- Standard Issue Types
- Order Entry (Admin)
- Order Entry (Sales)



**i** Project or Issue Type changed.  
[Refresh search](#) to update form fields.

► Issue Attributes

► Dates and Times

► Work Ratio

► Custom Fields

Search

Edit (Part of New): Edit tab will appear as follows:

Issue Navigator

Summary Edit New Manage

Switch to [simple searching](#)

You are currently using a new, unsaved search. [Save it as a filter](#)

Operations

Save it as a filter

History

- project = SOO
- project = SOT
- created >= 2012-02-06 AND created <= 2012-02-01 AND created <= 2012-01-16 AND created <= 2012-01-13 AND created <= 2012-01-12 AND created <= 2012-01-11 AND created <= 2012-01-10 AND created <= resolutiondate >= 2012-01-04 AND reso

project = SOO

Search

Displaying issues 1 to 1 of 1 matching issues.

T	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated	Due
	SOO-1	Summary test soo	Emma Richardson	OneTicketing Administrator		New		24/jan/12	24/jan/12	

Displaying issues 1 to 1 of 1 matching issues.

OneAccess © 2011 | [Report a problem](#)

Note: Manage filters are described as part of the 6.2.2

### 6.1.2 Create a filter:

Clicking on Save link in the left pane the screen will appear as follows:

ONEACCESS OneTicketing

Test OAB | Quick Search

Issue Navigator

Summary Edit New Manage

You are currently using a new, unsaved search.

Summary

Status: Assigned

Sorted by: Key descending

Operations

Save it as a filter

Save Current Filter

Name

Description

Favourite

Save Cancel

OneAccess Merlin © 2011 | [Report a problem](#)

Enter the filter name and click on save button. The result page will appear as follows:



**Issue Navigator — New and Unsaved search 1**

Filter: **New and Unsaved search 1**

Status: **Assigned**  
Sorted by: **Key descending**

Operations:  
Rename or Share the current filter  
Save as new filter  
Subscriptions for current filter

Displaying issues 1 to 4 of 4 matching issues.

T	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated
▶	OAB-5	Summary 5	Test OAB	Test OAB	↑	Assigned	Unresolved	28/Sep/11	28/Sep/11
▶	OAB-4	Summary 4	Test OAB	Test OAB	↑	Assigned	Unresolved	28/Sep/11	28/Sep/11
▶	OAB-3	CLONE - Summary 2	Test OAB	Test OAB	↑	Assigned	Unresolved	28/Sep/11	28/Sep/11
▶	OAB-2	Summary 2	Vijaysagar Reddy	Test OAB	↑	Assigned	Unresolved	27/Sep/11	27/Sep/11

Displaying issues 1 to 4 of 4 matching issues.

OneAccess Merlin © 2011 | Report a problem

## 6.1.3 Create a filter

### 6.1.3.1 Rename or Share for filter

Click on the Rename and Share link (Operations=> Rename or Share link): Enter new Name in the Name text field and click on Save button.

**Issue Navigator — New and Unsaved search 1 OA networks**

Filter: **New and Unsaved search 1 OA networks**

Status: **Assigned**  
Sorted by: **Key descending**

Operations:  
Rename or Share the current filter  
Save as new filter  
Subscriptions for current filter

Displaying issues 1 to 4 of 4 matching issues.

T	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated
▶	OAB-5	Summary 5	Test OAB	Test OAB	↑	Assigned	Unresolved	28/Sep/11	28/Sep/11
▶	OAB-4	Summary 4	Test OAB	Test OAB	↑	Assigned	Unresolved	28/Sep/11	28/Sep/11
▶	OAB-3	CLONE - Summary 2	Test OAB	Test OAB	↑	Assigned	Unresolved	28/Sep/11	28/Sep/11
▶	OAB-2	Summary 2	Vijaysagar Reddy	Test OAB	↑	Assigned	Unresolved	27/Sep/11	27/Sep/11

Displaying issues 1 to 4 of 4 matching issues.

OneAccess Merlin © 2011 | Report a problem

### 6.1.3.2 Creating a new filter from existing filter

Clicking on the Save as new filter link (Operations=> Save as link) the page will appear as follows:

The screenshot shows the 'Save Current Filter' dialog box in the OneAccess OneTicketing interface. The dialog has a 'Name' field, a 'Description' field, and a 'Favourite' checkbox. Below these fields are 'Save' and 'Cancel' buttons. On the left, a sidebar shows the filter name 'New and Unsaved search 1 OA networks 1' and the status 'Assigned'. The 'Operations' section includes links for 'Rename or Share the current filter', 'Save as new filter', and 'Subscriptions for current filter'.

Enter the Name and Click on save button. The filter was created successfully and the result page will appear as follows:

The screenshot shows the 'Save as' result page in the OneAccess OneTicketing interface. The page displays a table of 4 matching issues. The table has columns for 'T', 'Key', 'Summary', 'Assignee', 'Reporter', 'P', 'Status', 'Resolution', 'Created', and 'Updated'. The issues are listed as follows:

T	Key	Summary	Assignee	Reporter	P	Status	Resolution	Created	Updated
▶	OAB-5	Summary 5	Test OAB	Test OAB	🔴	Assigned	Unresolved	28/Sep/11	28/Sep/11
▶	OAB-4	Summary 4	Test OAB	Test OAB	🔴	Assigned	Unresolved	28/Sep/11	28/Sep/11
▶	OAB-3	CLONE - Summary 2	Test OAB	Test OAB	🔴	Assigned	Unresolved	28/Sep/11	28/Sep/11
▶	OAB-2	Summary 2	Vijaysagar Reddy	Test OAB	🔴	Assigned	Unresolved	27/Sep/11	27/Sep/11

Below the table, it says 'Displaying issues 1 to 4 of 4 matching issues.' The sidebar on the left shows the filter name 'New and Unsaved search 1 OA networks 1 Save as' and the status 'Assigned'.

### 6.1.3.3 Subscriptions for filter

Clicking on the Subscriptions link, the result page will display with 'Add Subscription' and view all filters link. Clicking on the Add Subscription link the page will appear as follows

## 6.2 Manage Filters

Manage filters will display with the 4 vertical tabs in the left navigation:

1. Favorite 2. My 3. Popular 4. Search

### 6.2.1 Favorite Filters

Favorite filter will display the list of favorite filter saved for the present user. If favorite filters are not present it will display the message 'You have no favorite filters'. While creating filters by default favorite filter is enabled with yellow color star and the 'favorite filters' list will display as follows:

Name	Issues	Author	Shared With	Subscriptions	Operations
★ New and Unsaved search	4	Test OAB (test-ems-oab)	Private filter	None - <a href="#">Subscribe</a>	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Columns</a>
★ New and Unsaved search 1 OA networks	4	Test OAB (test-ems-oab)	Private filter	None - <a href="#">Subscribe</a>	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Columns</a>
★ New and Unsaved search 1 OA networks 1	4	Test OAB (test-ems-oab)	Private filter	None - <a href="#">Subscribe</a>	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Columns</a>
★ New and Unsaved search 1 OA networks 1 Save as	4	Test OAB (test-ems-oab)	Private filter	None - <a href="#">Subscribe</a>	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Columns</a>

Clicking on the Edit link users will direct to edit filter page and they can edit the selected the filter name.

Clicking on the Delete link user can delete the filter even if they the filter is subscribed for the filter.

Clicking on the Column links user is able to add/delete and alter the columns.

### 6.2.2 My Filters

Clicking on the tab in the left pane it will display the list of filters for the user.

**Manage Filters**

**My Filters**  
Filters are issue searches that have been saved for re-use. This page shows all filters that you have created.

Name	Issues	Shared With	Subscriptions	Operations
New and Unsaved search	4	Private filter	None - Subscribe	Edit   Delete   Columns
New and Unsaved search 1 OA networks	4	Private filter	None - Subscribe	Edit   Delete   Columns
New and Unsaved search 1 OA networks 1	4	Private filter	None - Subscribe	Edit   Delete   Columns
New and Unsaved search 1 OA networks 1 Save as	4	Private filter	None - Subscribe	Edit   Delete   Columns

### 6.2.3 Popular filter

Filters are issue searches that have been saved for re-use. This page shows you the most popular filters.

**Manage Filters**

**Popular Filters**  
Filters are issue searches that have been saved for re-use. This page shows you the most popular filters.

Name	Issues	Author	Shared With	Subscriptions	Popularity
All Tickets	5	OneTicketing Administrator (admin)	Group: ems-users	None - Subscribe	1
New and Unsaved search	4	Test OAB (test-ems-oab)	Private filter	None - Subscribe	0
New and Unsaved search 1 OA networks	4	Test OAB (test-ems-oab)	Private filter	None - Subscribe	0
New and Unsaved search 1 OA networks 1	4	Test OAB (test-ems-oab)	Private filter	None - Subscribe	0
New and Unsaved search 1 OA networks 1 Save as	4	Test OAB (test-ems-oab)	Private filter	None - Subscribe	0

### 6.2.4 Search filter

Login with user credentials=> Issues link/dropdown in the horizontal navigation => Manage tab/ Manage filters => Select left pane popular tab => Click on All Issues filter => User will get the all the issues

### 6.2.5 Search for all tickets

Login with user credentials=> Issues link/dropdown in the horizontal navigation => Manage tab/ Manage filters => Select left pane popular tab => Click on All Issues filter => User will get the all the issues related to that project.

## 6.3 Export the search results and configure the columns

Jira had provided the few options for the search results. 1. Views and 2.Tools.

### 6.3.1 Views

Views dropdown is having many options for the user, based on the requirement user need to select option.

The screenshot shows the OneAccess OneTicketing interface. The top navigation bar includes 'Dashboards', 'Projects', and 'Issues'. The 'Issues' section is active, displaying a table of issues. A 'Views' dropdown menu is open, showing options like 'Printable', 'Full Content', 'XML', 'RSS (Issues)', 'RSS (Comments)', 'Word', 'Excel (All fields)', 'Excel (Current fields)', 'Charts', and 'On Dashboard'.

T	Key	Summary	Assignee	Reporter	P	Status	Resolved
OAB-5	Summary 5	Test OAB	Test OAB	Assigned	Unres		
OAB-4	Summary 4	Test OAB	Test OAB	Assigned	Unres		
OAB-3	CLONE - Summary 2	Test OAB	Test OAB	Assigned	Unres		
OAB-2	Summary 2	Vijaysagar Reddy	Test OAB	Assigned	Unres		
OAB-1	Summary	Test OAB	Test OAB	Resolved	Fixed		

### 6.3.2 Tools

Configure option => Clicking on the Configure Columns the page will direct to Issue Navigator column as follows and user can manage add/delete and alter columns.

The table will show issue fields in order of appearance in your Issue Navigator. Note: Not all the fields below are shown in Issue Navigator for each issue (e.g. custom fields which are only per-project and/or per-issue type).

## 7. Dash Board

### 7.1 Dash Board

The Dashboard will show the Horizontal navigation bar with 3 tabs with the Create Issue link (Dashboards, Projects, Issues and Create Issue).

### 7.2 Projects

Clicking on the project dropdown in the horizontal navigation will display the Current Project, Recent Projects and View All Projects will display the list of project related to the user.

The screenshot shows the 'Projects' dropdown menu. It lists the 'Current Project' as 'Sales Operations Ticketing (SOT)'. Under 'Recent Projects', it lists 'Sales Operations Order Entries (SOO)', 'OneTickets (OT)', 'Extranet (EXT)', 'OneIntranet (INT)', and 'Central Customer Support (CCS)'. At the bottom, there is a link to 'View All Projects'.

Clicking on the project will go the Summary page which contains the Description, Issues: 30 Day Summary and Activity Screen fields.

**Sales Operations Order Entries**

Create: [Order Entry \(Sales\)](#) [Order Entry \(Admin\)](#)

**Summary**

**Description**

Order entries and questions with respect to the delivery of an outstanding order.

Lead: [Emma Richardson](#)  
Key: [SOO](#)

**Issues: 30 Day Summary**

1

0

21-Jan 28-Jan 4-Feb 11-Feb

Issues: 1 created and 0 resolved

**Issues: Updated recently**

[SOO-1](#) Summary test soo 24/Jan/12

**Activity Stream**

24 January

[OneTickets Administrator](#) created [SOO-1 - Summary test soo](#)  
Description Sales Operations Order Entries

24 January at 15:49 [Comment](#) [Watch](#)

OneAccess © 2011 | [Report a problem](#)

[JIRA](#) [ONEACCESS](#) [Tools](#)

### 7.3 Issues

Horizontal Navigation => Issues dropdown: Users will get the dropdown with the following links

Search for Issues, Create Issue, Recent Issues list, Favorite filters list and Manage filters

Clicking on any link in the dropdown will direct to respective page. Issues dropdown link will appear as follows:

**Issues**

[Search for Issues](#)

[Create Issue](#)

**Recent Issues**

- [SOO-1 Summary test soo](#)
- [SOT-3 Just testing](#)
- [WDMS-2 Office connector plugin](#)
- [IDS-67 Testing 17](#)
- [IDS-63 Test Mail](#)
- [more...](#)

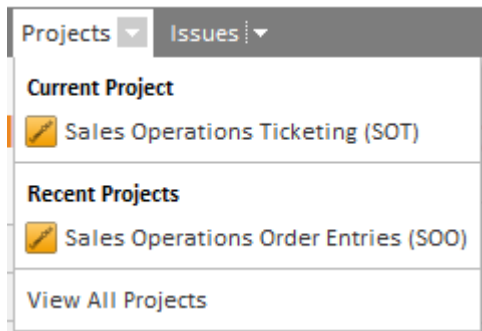
**Favourite Filters**

- [All OAB tickets, non-closed & ...](#)
- [All Tickets](#)

[Manage Filters](#)

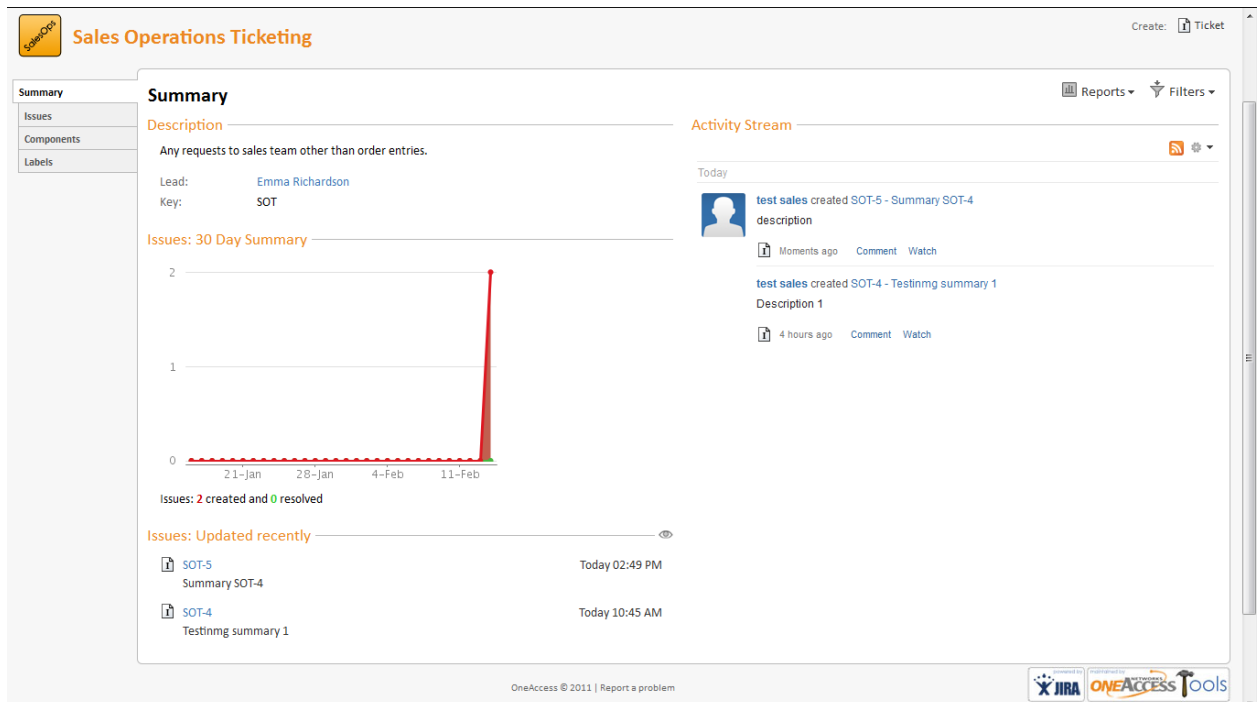
## 8. Browse Projects

Projects: Projects dropdown it will display the Current project, list of recent projects and clicking on the View All Projects will display the list of projects for the user.



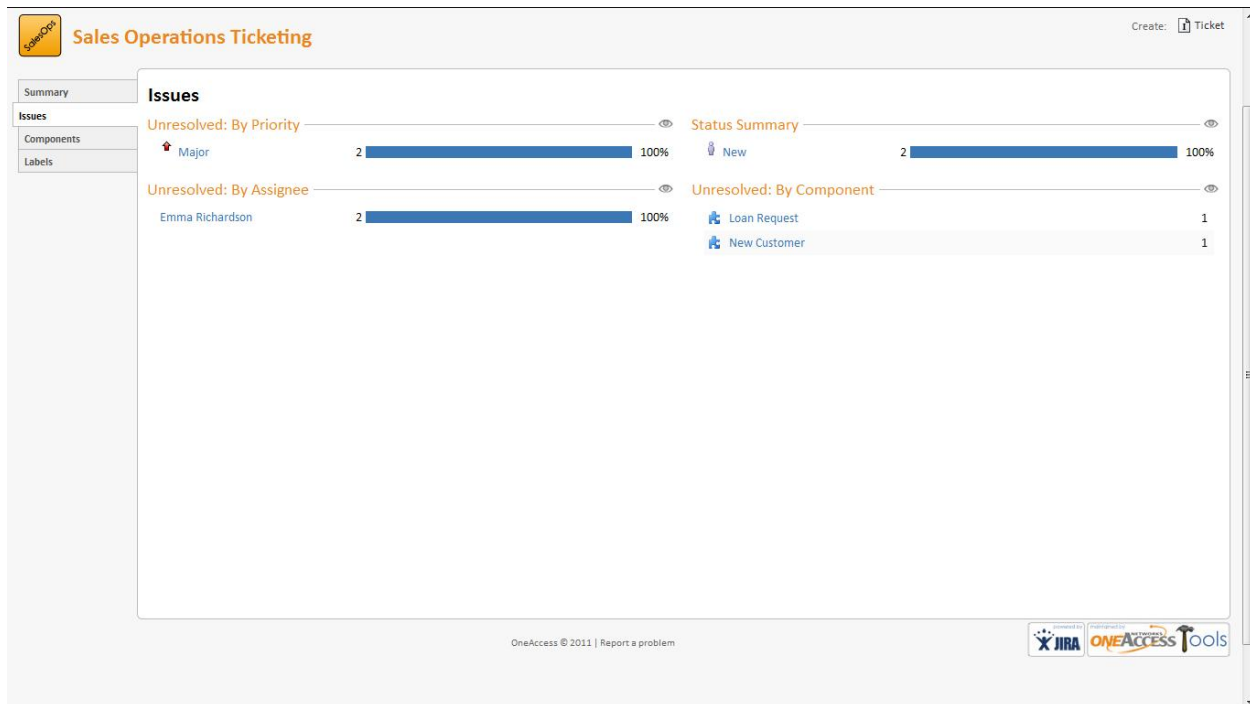
### 8.1 Summary:

Clicking on the project will direct to Summary page which contains the Description, Issues: Due, Issues: 30 Day Summary, Versions: Due and Activity Stream fields. The page appearance as follows:



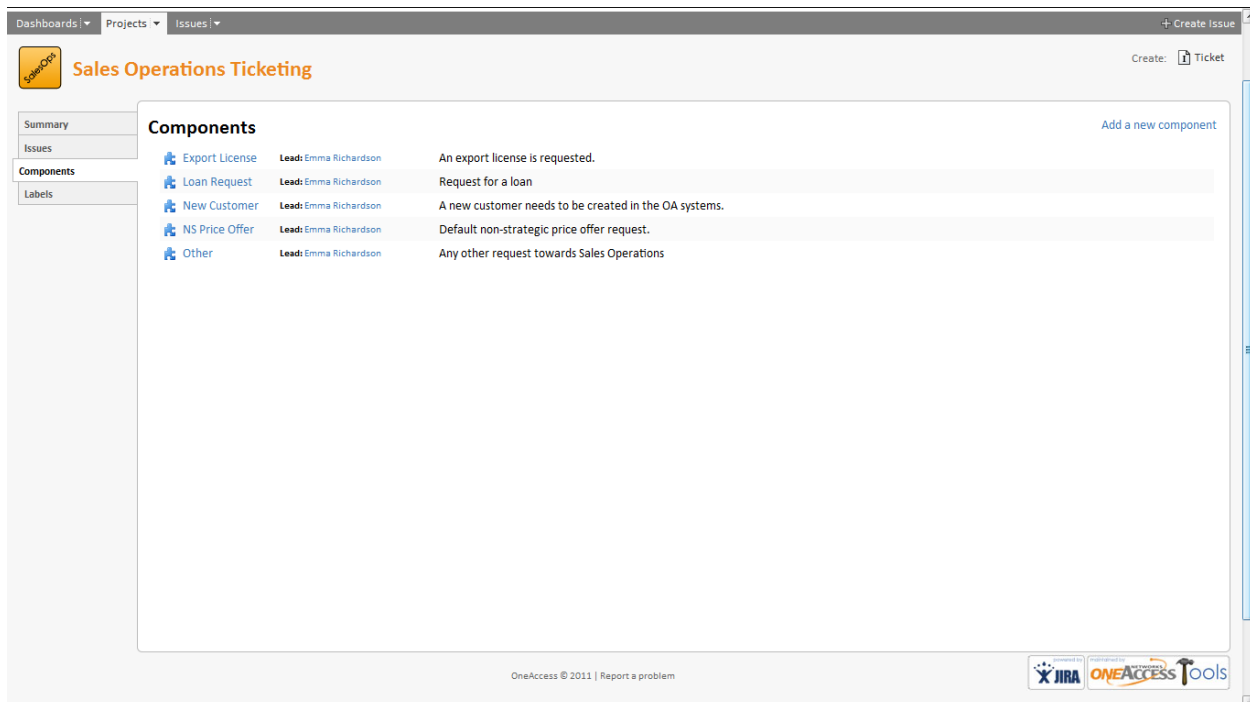
### 8.2 Issues

Clicking on the Issues link in the left navigation, the page will display as follows:



### 8.3 Components:

Clicking on the Components the page will display the list of components related to the Project.



### 8.4 Labels:

Clicking on the Labels the page will display the issues related to the labels.



The screenshot displays the 'Sales Operations Ticketing' dashboard. At the top, there are navigation tabs for 'Dashboards', 'Projects', and 'Issues', along with a '+ Create Issue' button. The main header area includes the 'SalesOps' logo and the title 'Sales Operations Ticketing'. On the left, a sidebar menu lists 'Summary', 'Issues', 'Components', and 'Labels'. The 'Labels' section is active, showing a 'Heatmap' view. Below the title, there are links for 'View: Popular Labels' and 'All Labels', and a sorting option 'Order: alphabetically' with a 'popularity' link. A descriptive text states: 'Below are the 1 most popular labels. The bigger the text, the more popular the label. Click on a label to see its associated content.' The most prominent label is 'SalesOps'. At the bottom of the interface, there is a footer with 'OneAccess © 2011 | Report a problem' and logos for 'JIRA' and 'ONEACCESS Tools'.

Dashboards ▾ Projects ▾ Issues ▾ + Create Issue

**SalesOps** Sales Operations Ticketing Create: Ticket

Summary  
Issues  
Components  
Labels

### Labels

#### Heatmap

View: [Popular Labels](#) | [All Labels](#)

Order: [alphabetically](#) | [popularity](#)

Below are the 1 most popular labels. The bigger the text, the more popular the label. Click on a label to see its associated content.

**SalesOps**

OneAccess © 2011 | Report a problem