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

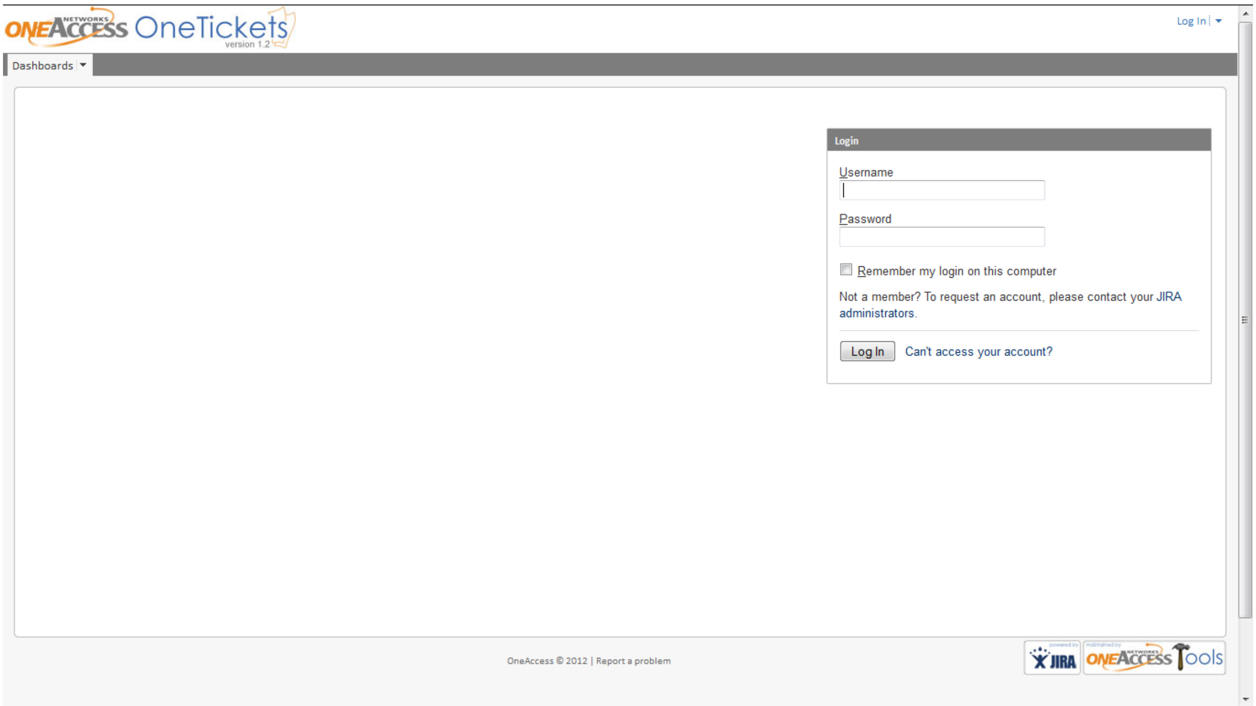
1 Introduction

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.

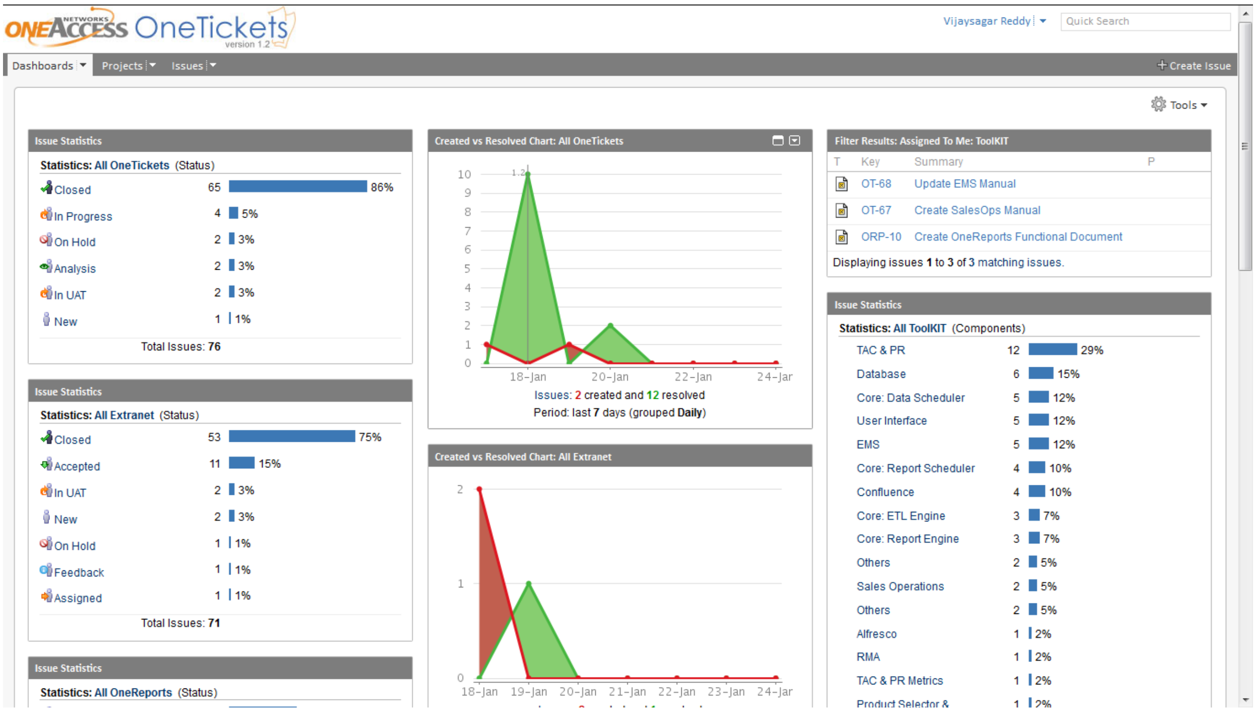
2 Ticket Fields

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



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.

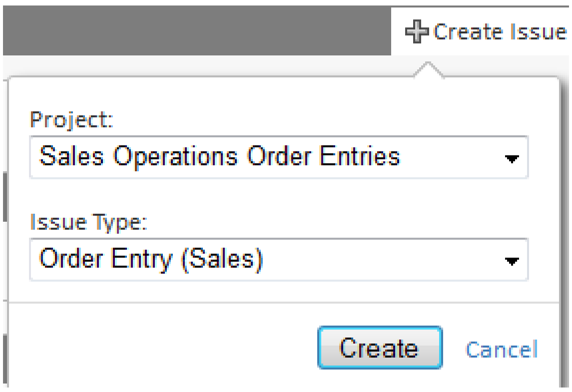


Clicking on the Create Issue link user will able to see small popup window, in that user will able to see two projects as follows:

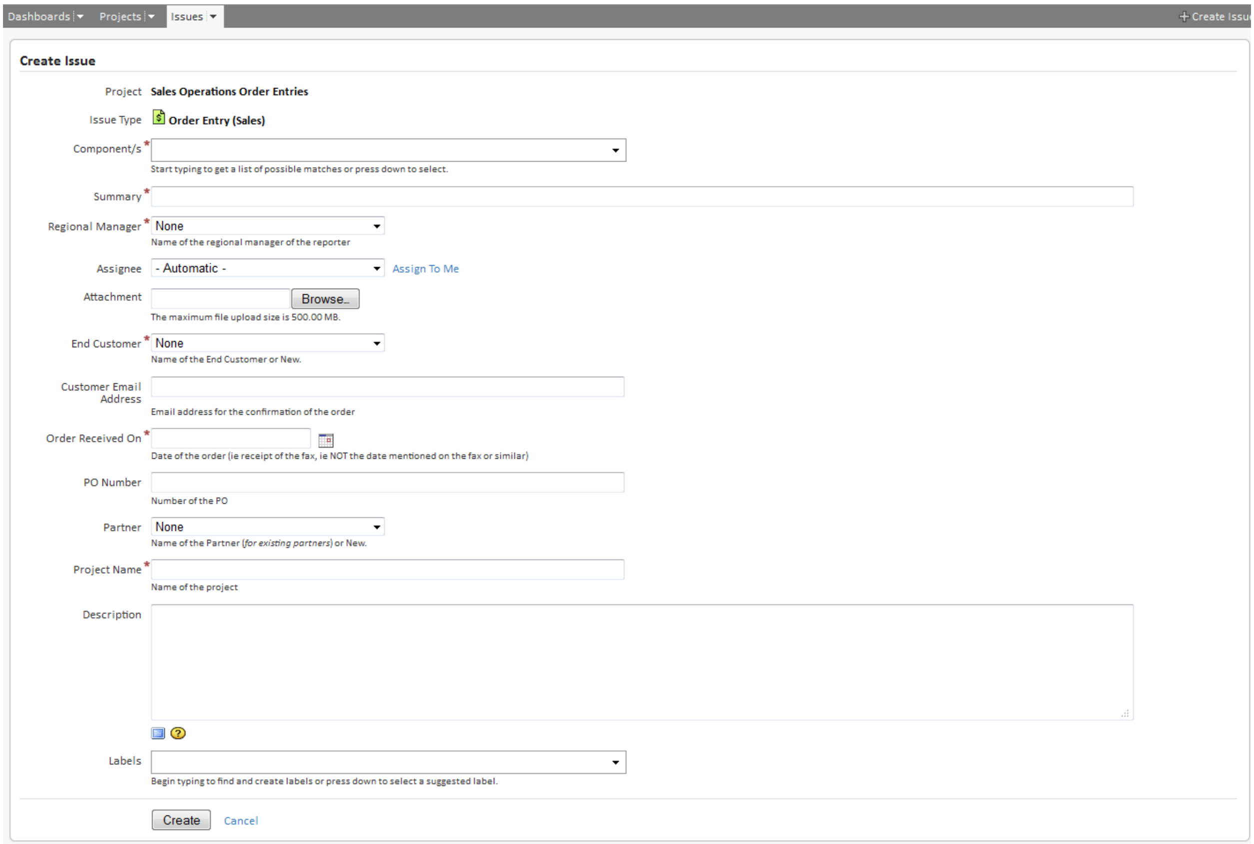
1. Sales Operations Order Entries(SOO)
2. Sales Operations Ticketing(SOT)

1. Sales Operations Order Entries (SOO)

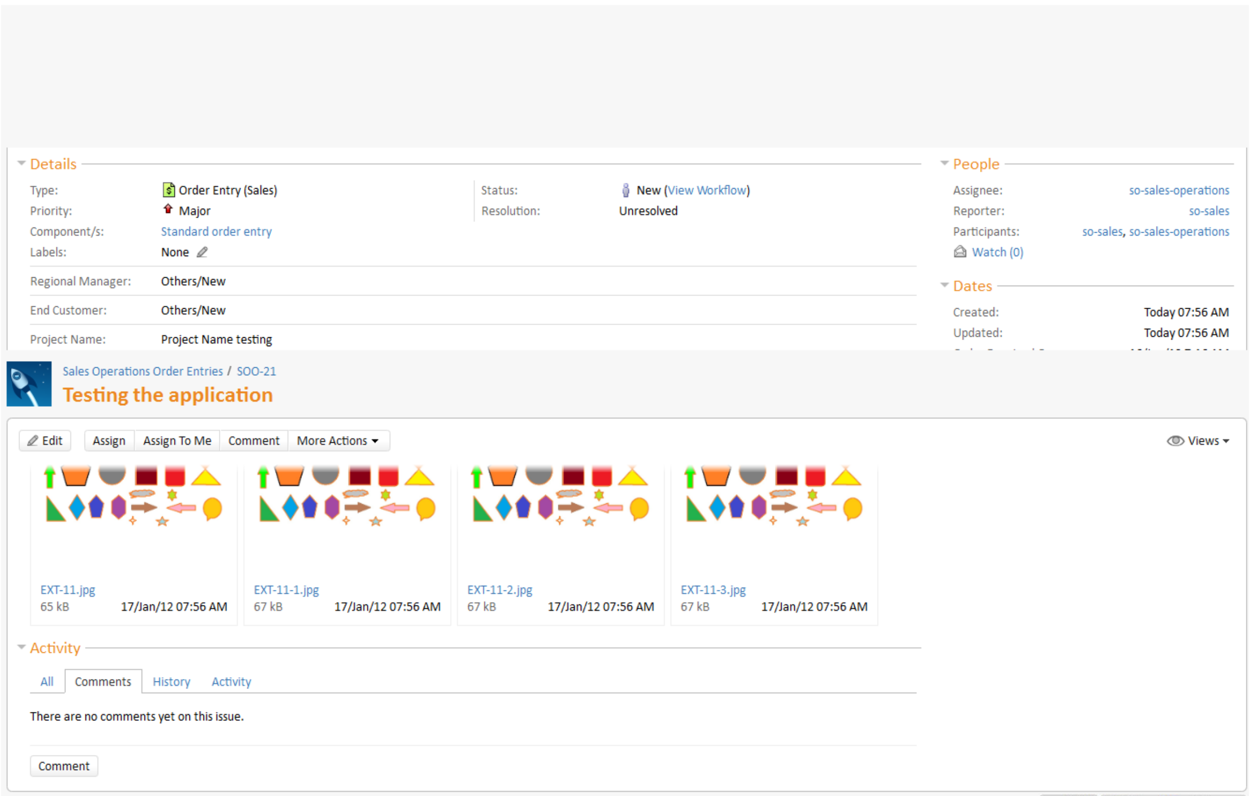
User with SO Sales and SO Sales Operations access: In popup select the Project as 'Sales Operations Order Entries' and Issue type as 'Order Entry (Sales)' (the screen will appear as follows)



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



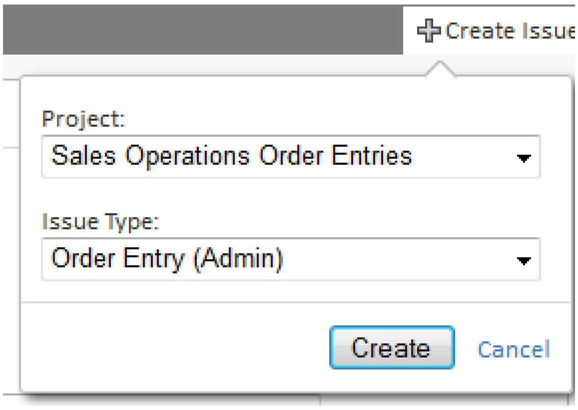
After entering all mandatory fileds user will get the following screen.



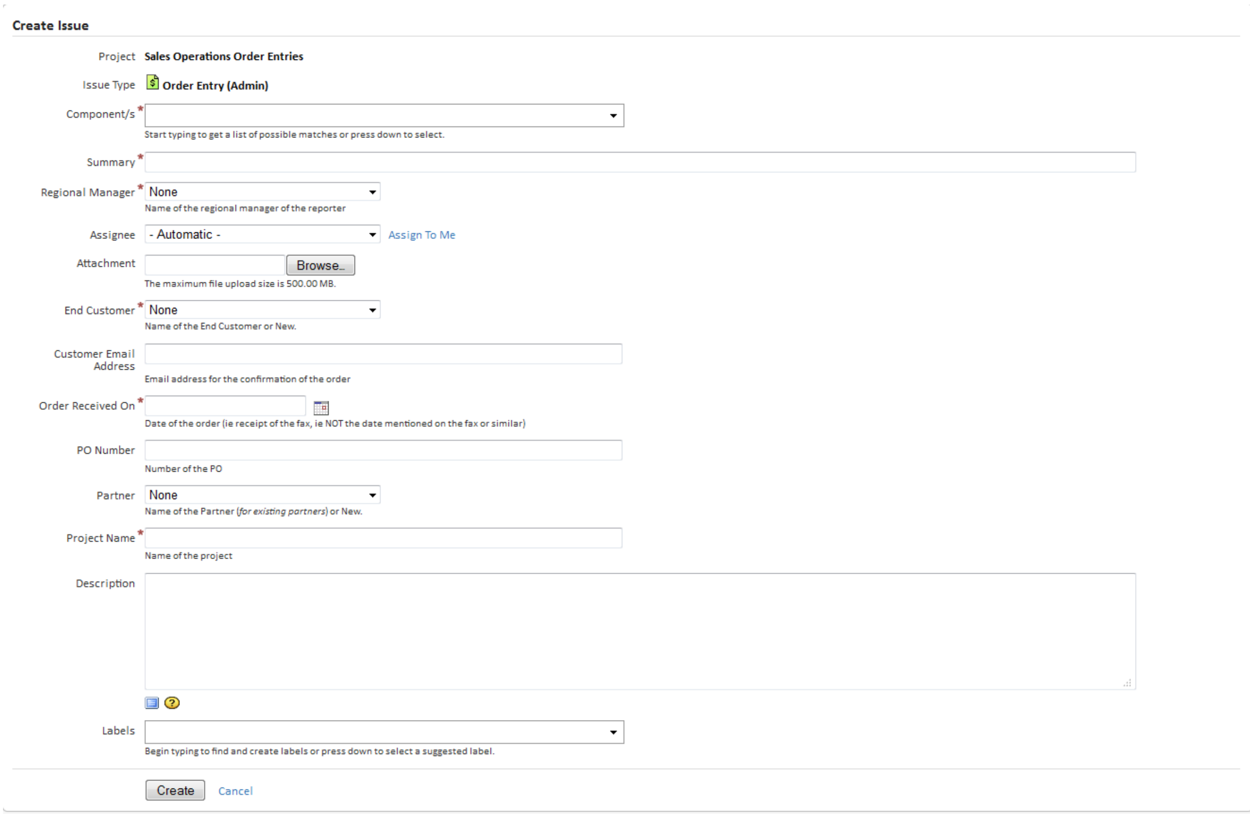
If user selects the Project as 'Sales Operations Order Entries' and Issue type as 'Order Entry (Admin) user will get the following error message.

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

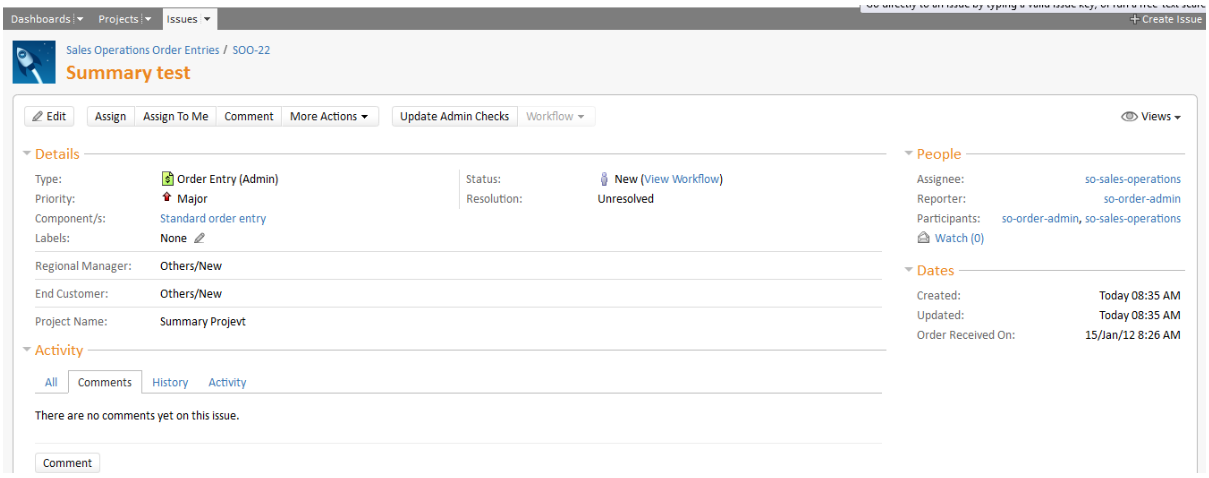
User with SO Sales admin access: In popup select the Project as 'Sales Operations Order Entries' and Issue type as 'Order Entry (Sales)' (the screen will appear as follows)



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



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

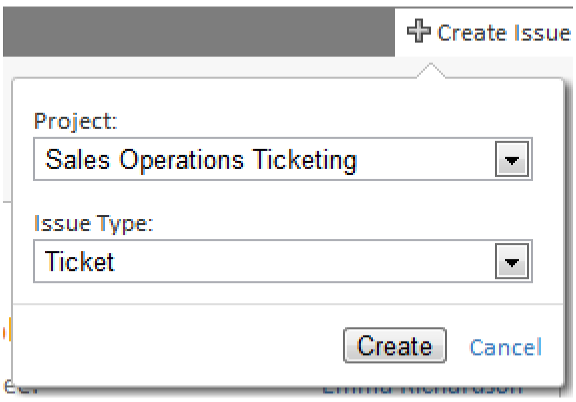


If user selects the Project as ‘Sales Operations Order Entries’ and Issue type as ‘Order Entry (Sales) user will get the following error message on the screen.

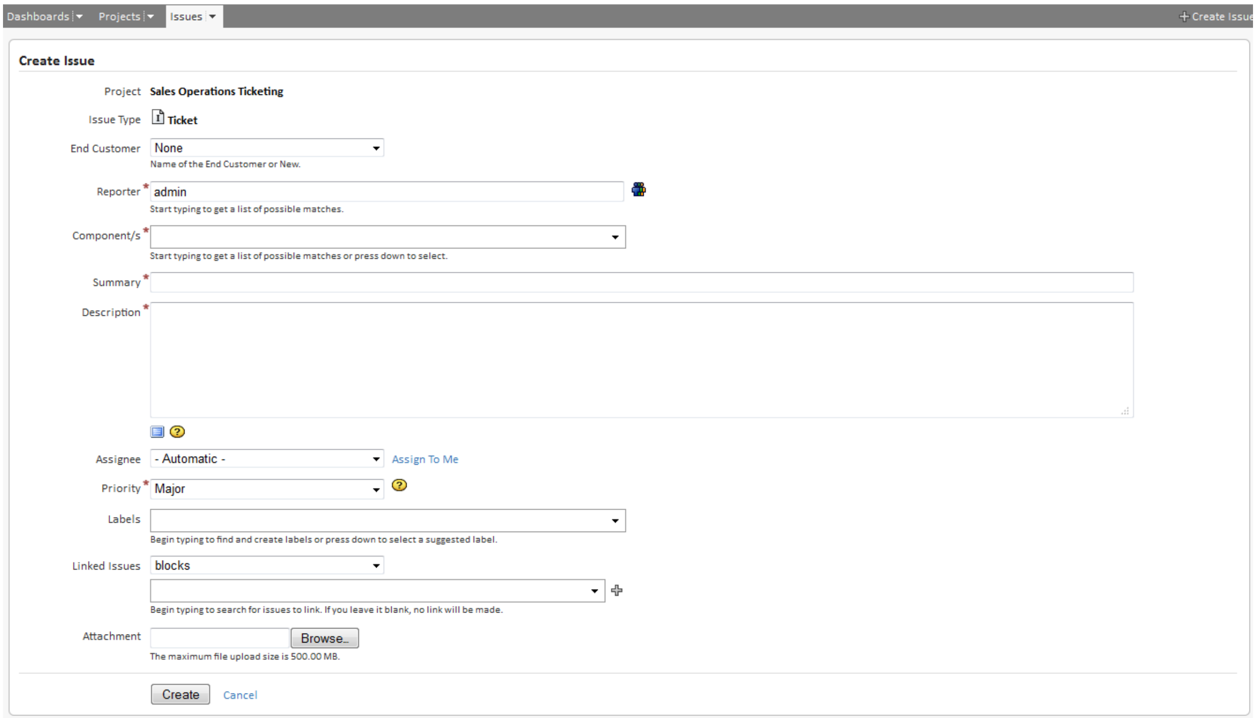
“**So-order-admin**, This issue type is for sales peoples only. Please contact your administrator.”

2. Sales Operations Ticketing (SOT)

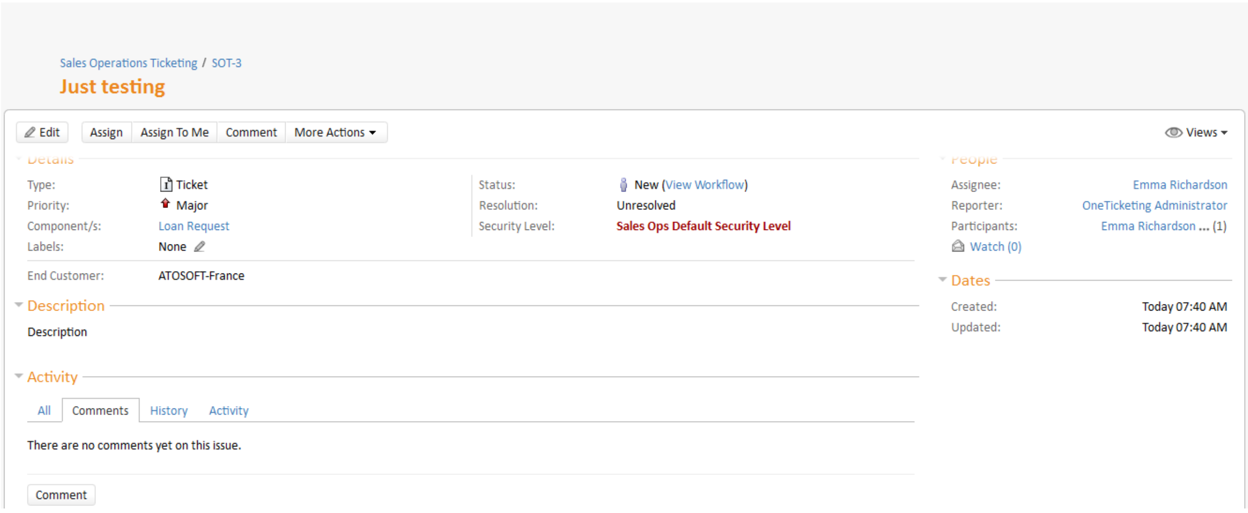
Any user login with so-sales group can ask everything else to the sales team by using the Issue type as Ticket. User with so-sales group access: In popup select the Project as ‘Sales Operations Ticketing’ and Issue type as ‘Ticket’ (the screen will appear as follows)



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



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



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

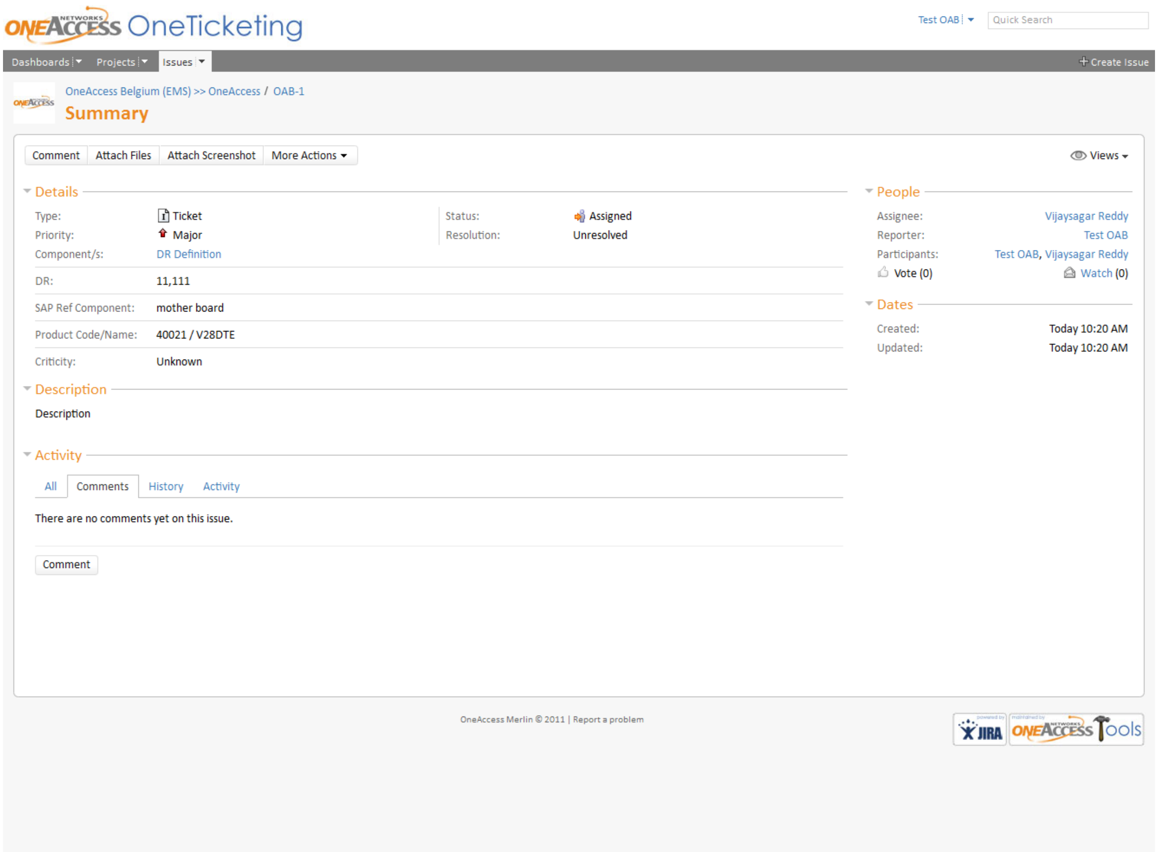
Requestor/Reporter of the ticket and will be displayed in ticket once user created a ticket.

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:

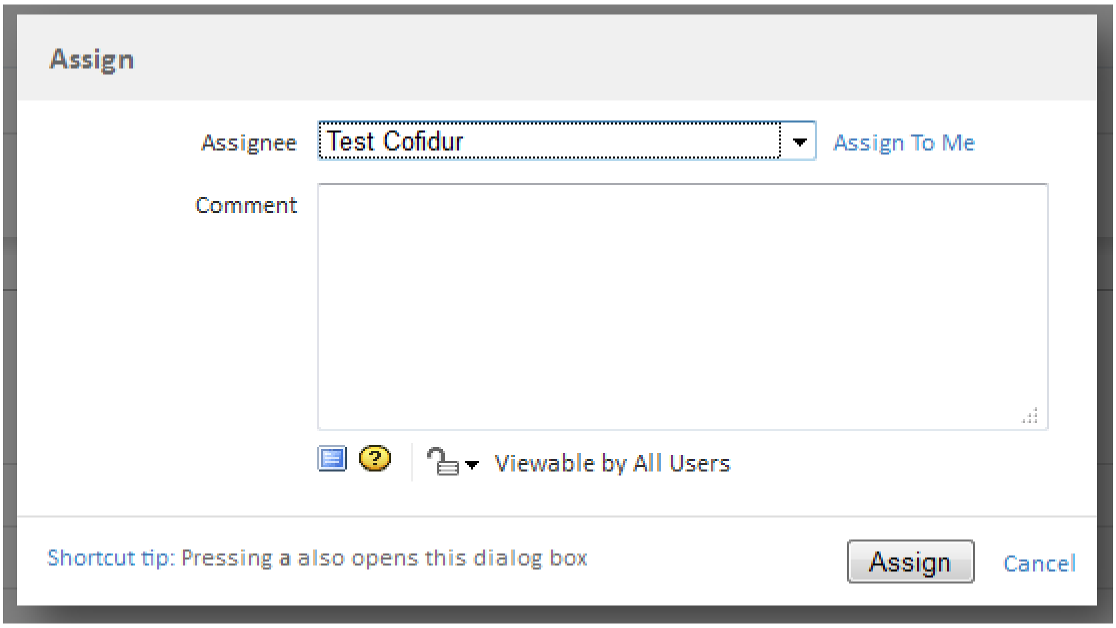


2.19 Assign

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



2.20 Assign to me

Click on the Assign to me tab users should able assign the tickets for them self’s

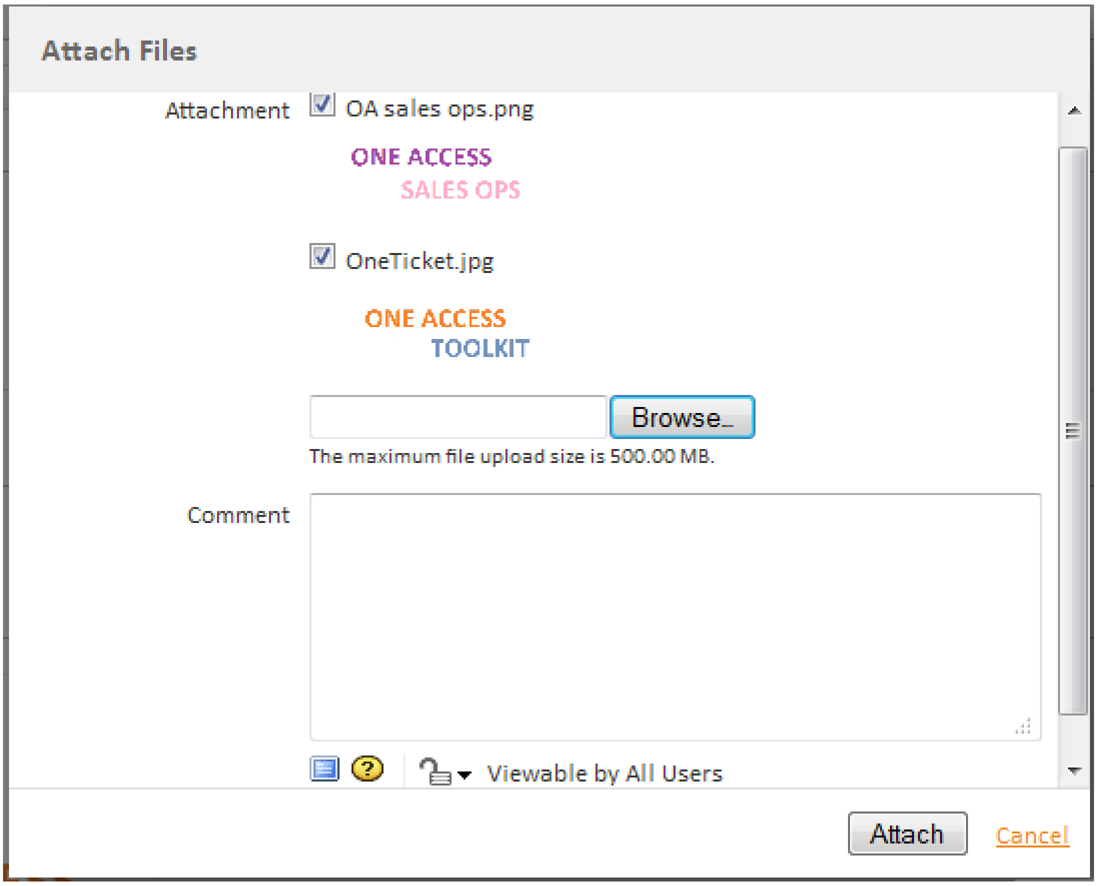
2.21 Add comment:

Clicking on the ‘Comment’ button user can add a comment. A comment can be added to a ticket. A comment consists of at maximum 512 ASCI 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



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.

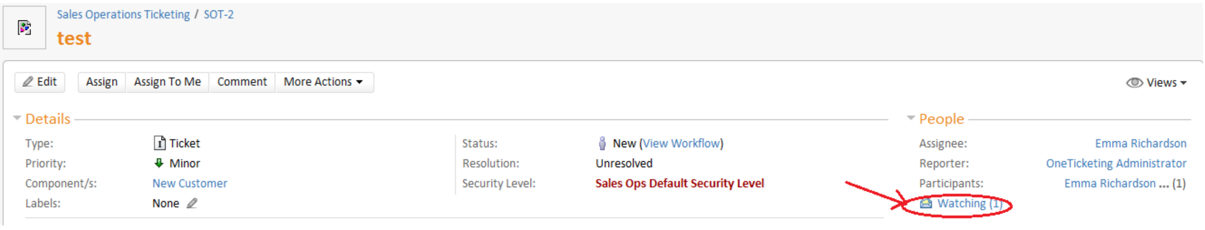
2.23 Attach screenshot

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.

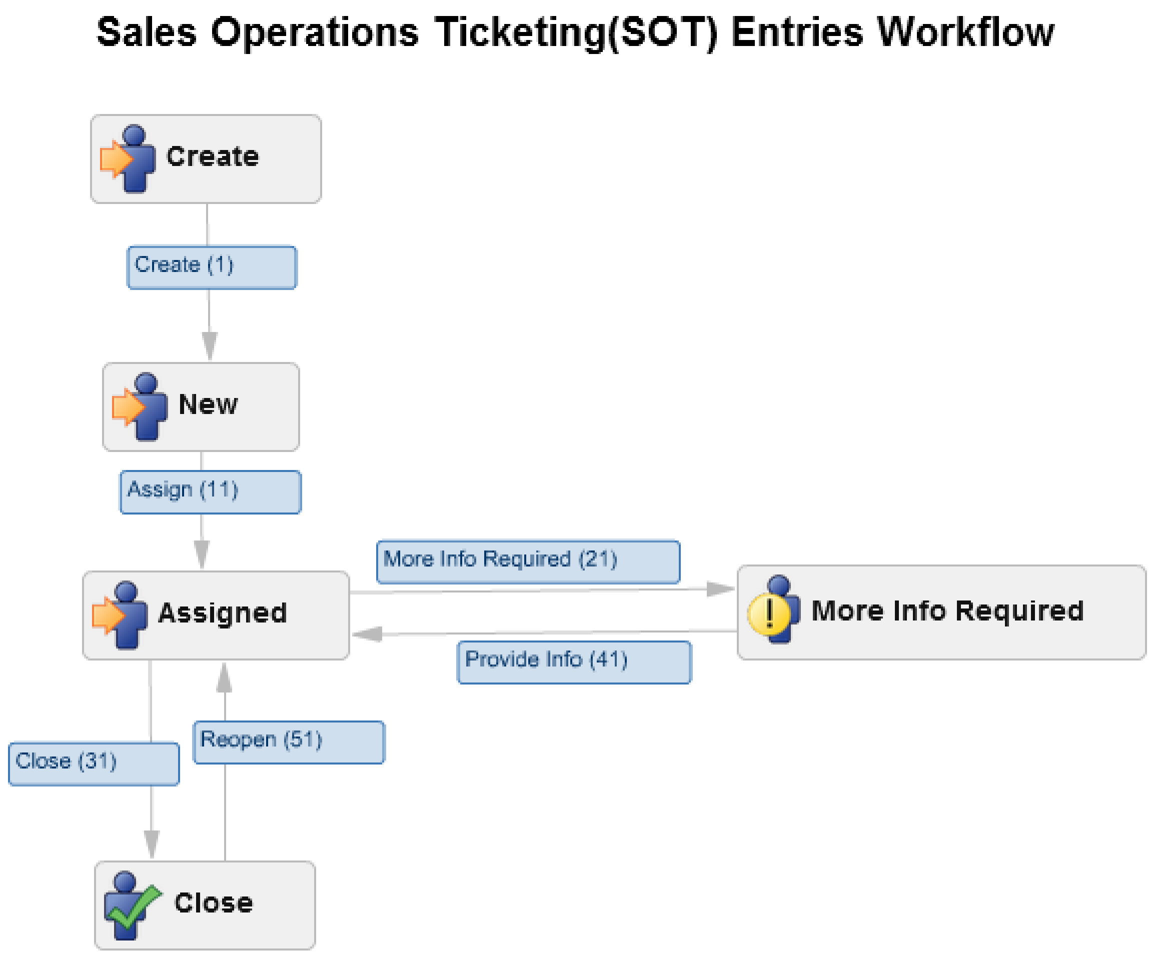
3.1 Status changes for tickets related to SOO(Sales)

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

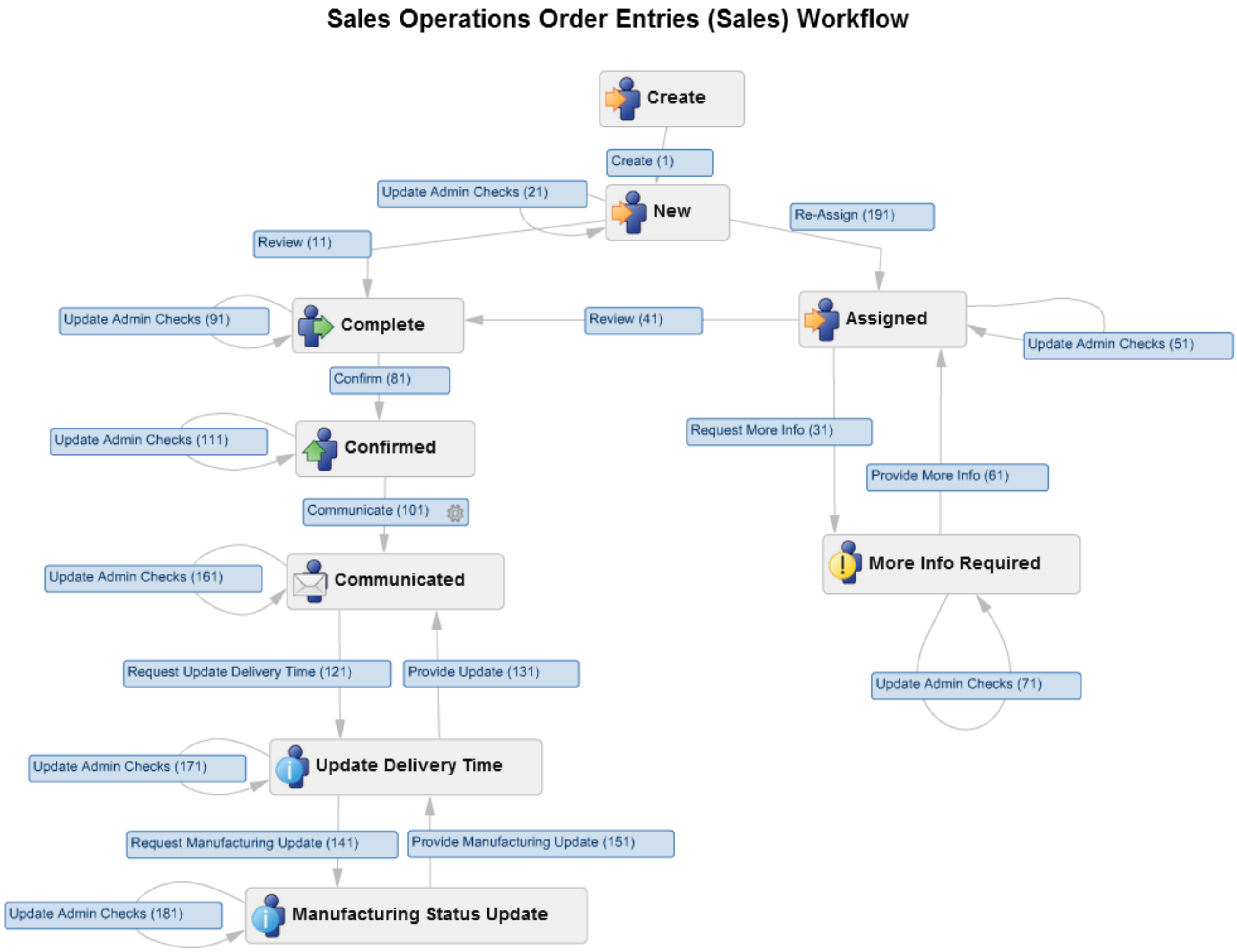
From step	Transition	To Step	By	Description
-	Create a request	Assigned	SO users	A new request is created.
Assigned	Assign	Assigned	SO Sales Operations	The ticket gets assigned to a responsible within OA sales operations.
Assigned	Further Info Required	More Info Req.	*Assignee within* SO Sales Operations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

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



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

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



Note: The “Order Admin” users will 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.

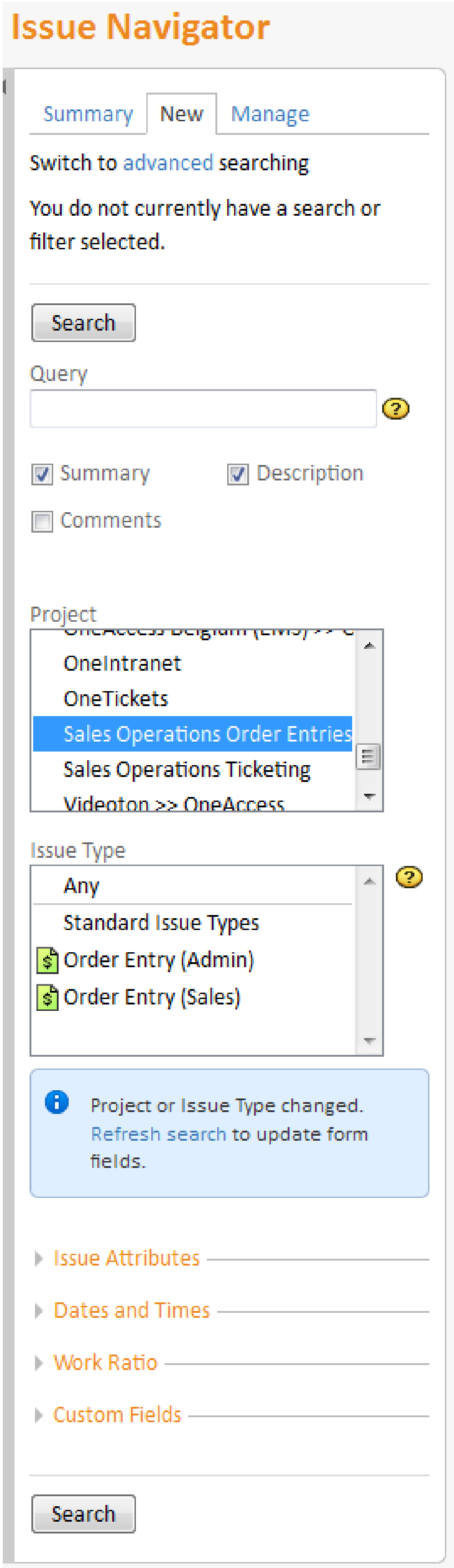
In the result page 3 tabs will appear (Summary, New and Manage) in the left pane.

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:

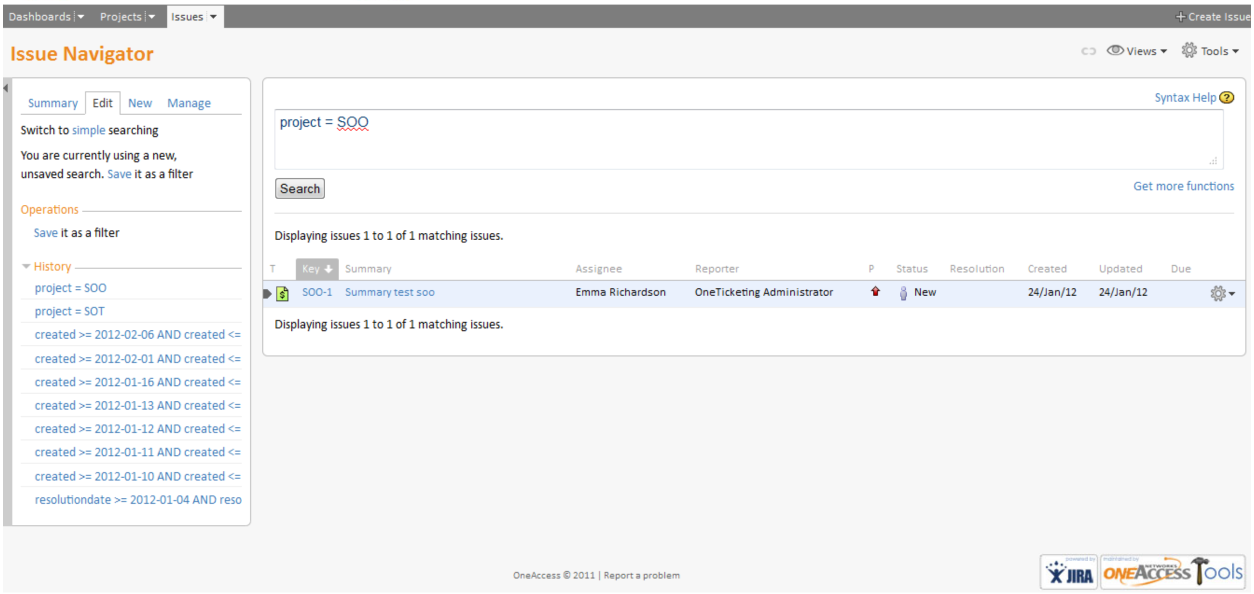
New: New tab will present with Switch to ‘advanced’ searching. Clicking on the advanced link the text link present in the New tab the text changes as follows: Switch to simple searching. (if u have already selected for simple search user will get a link saying that History dropdown with the searched 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.)



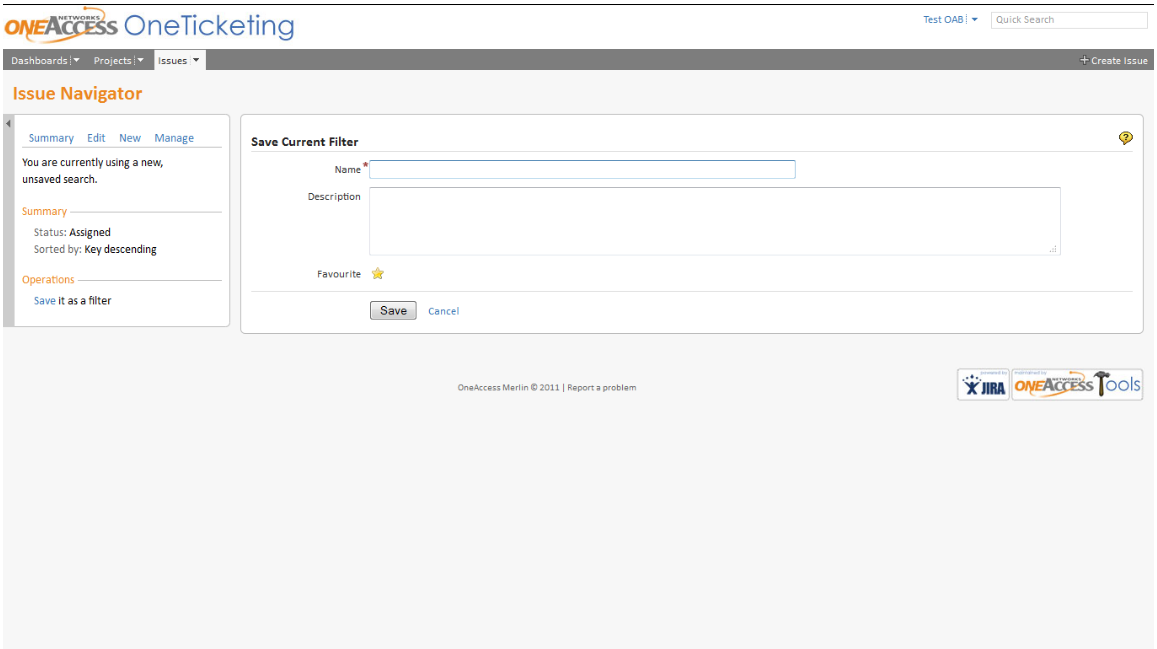
Edit (Part of New): Edit tab will appear as follows:



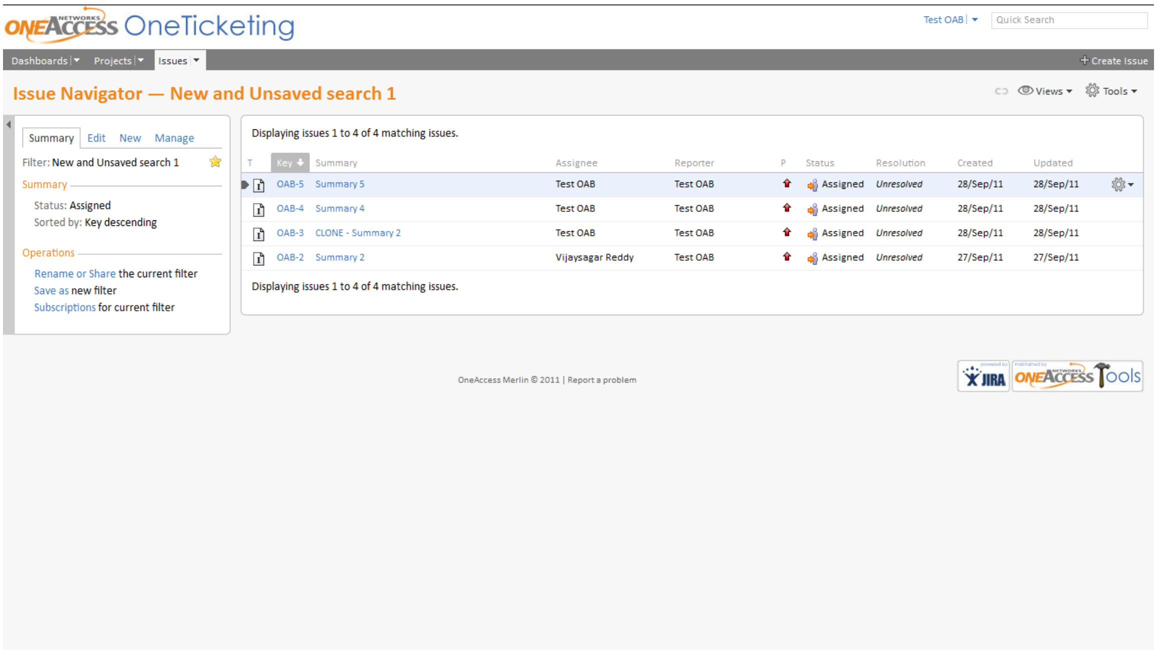
Note: Manage filters are described as part of the 6.2.2

6.1.2 Create a filter:

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



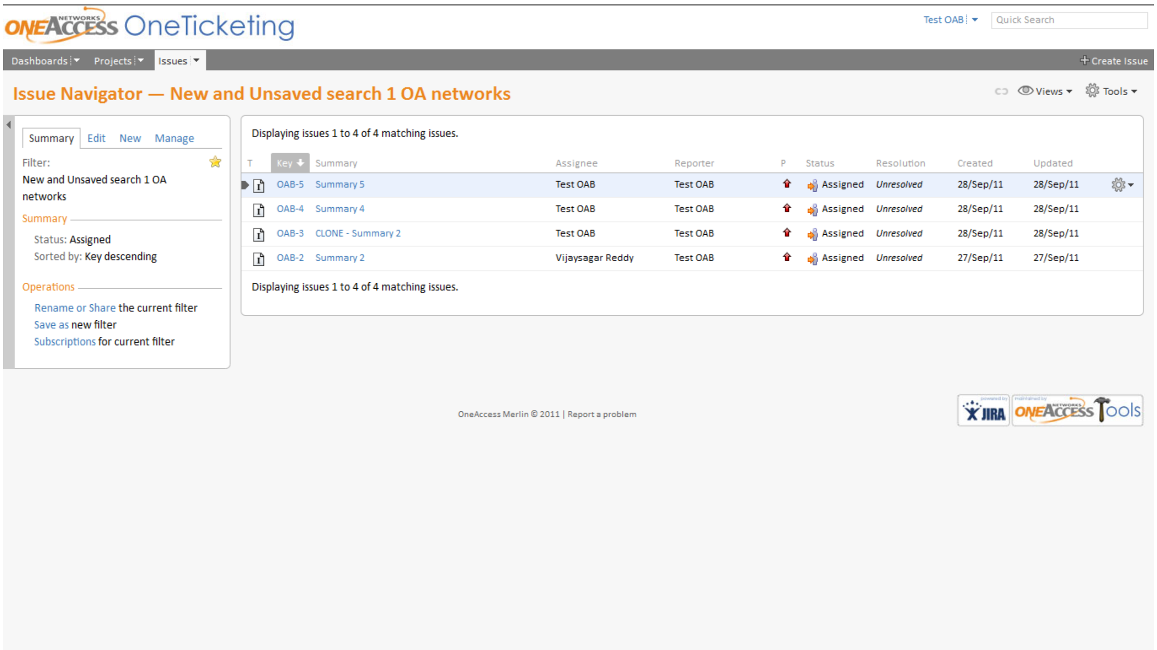
Enter the filter name and click on save button. The result page will appear as follows:



6.1.3 Create a filter

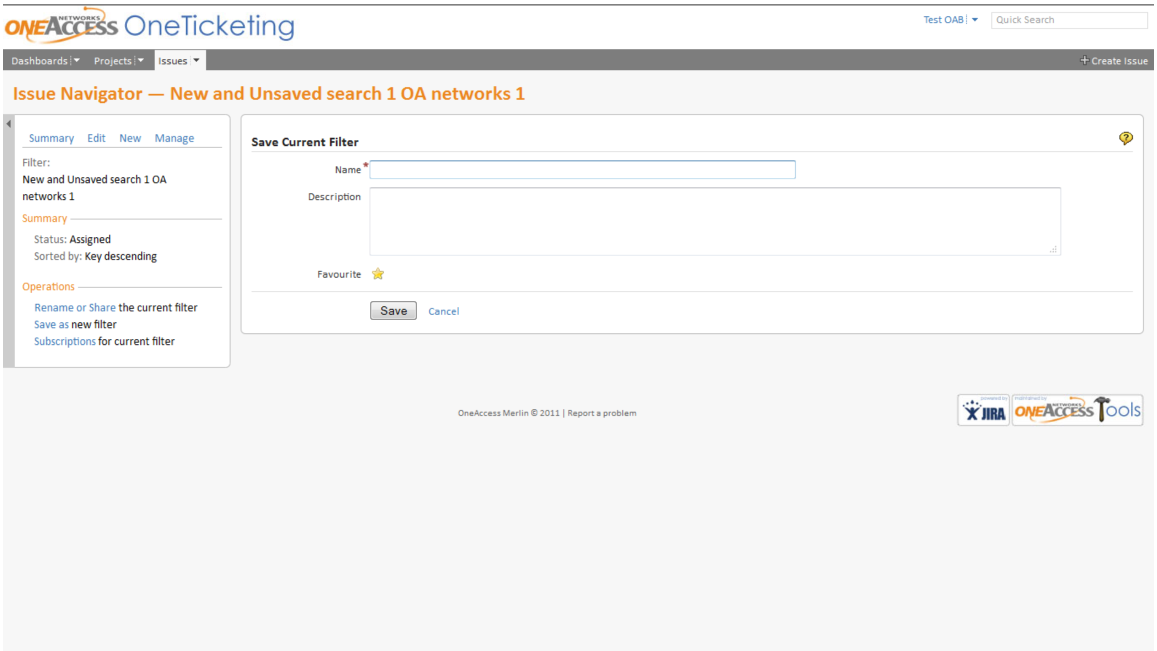
6.1.3.1 Rename or Share for filter

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.

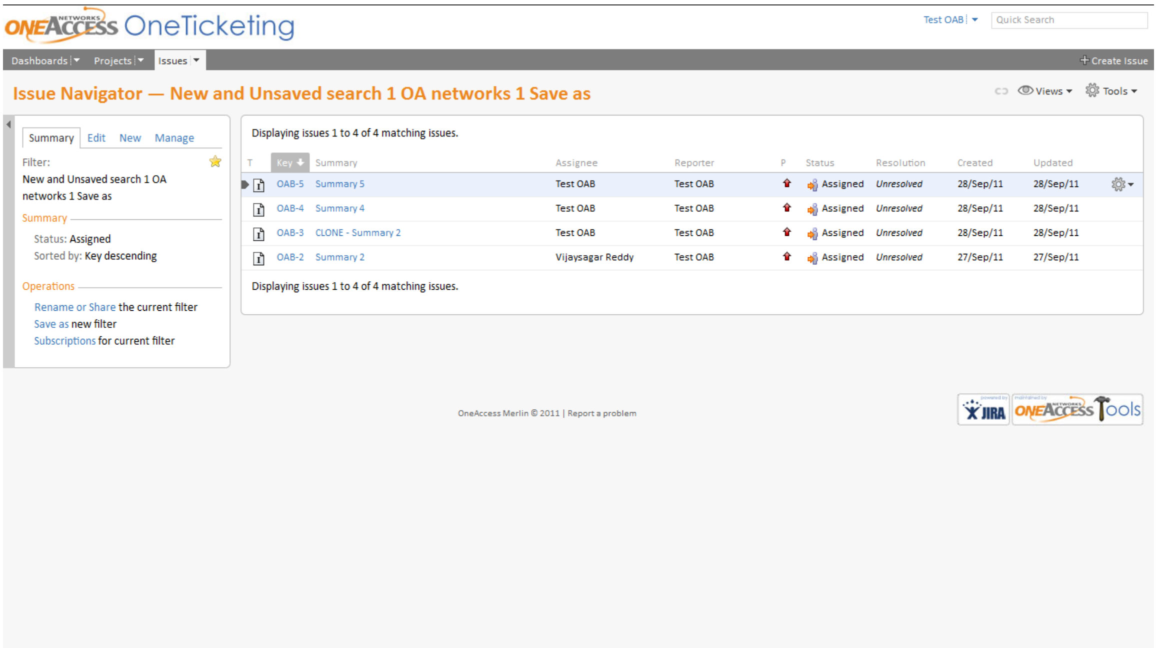


6.1.3.2 Creating a new filter from existing filter

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

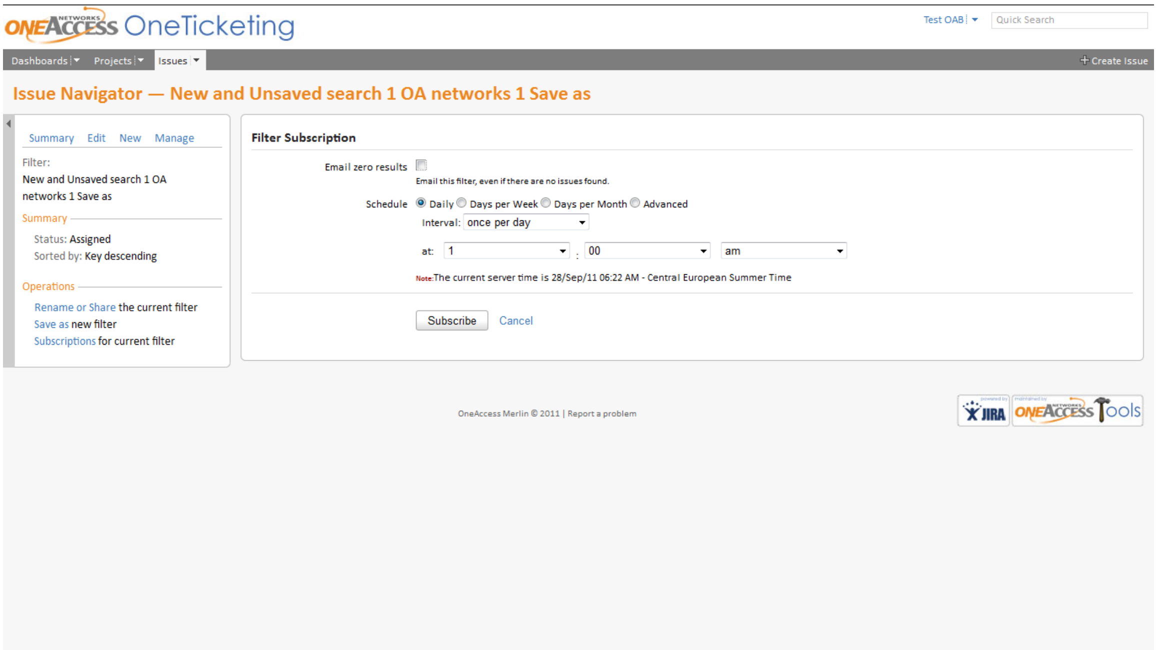


Enter the Name and Click on save button. The filter was created successfully and the result page will appear as follows:



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



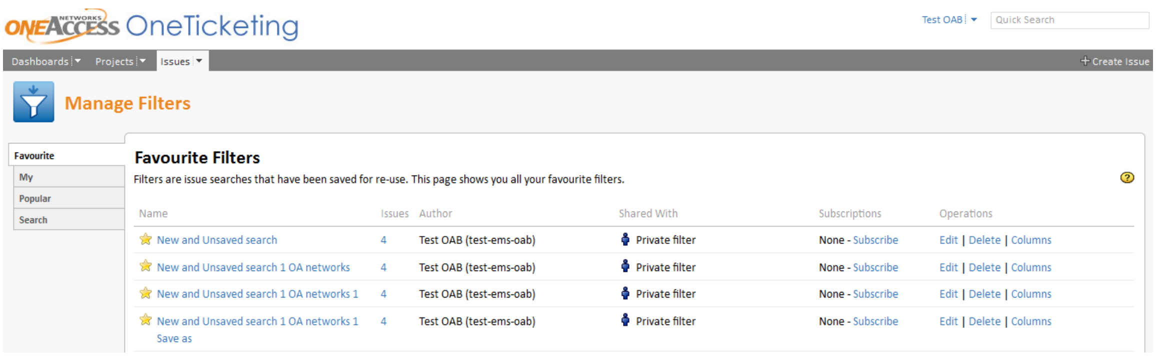
6.2 Manage Filters

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:



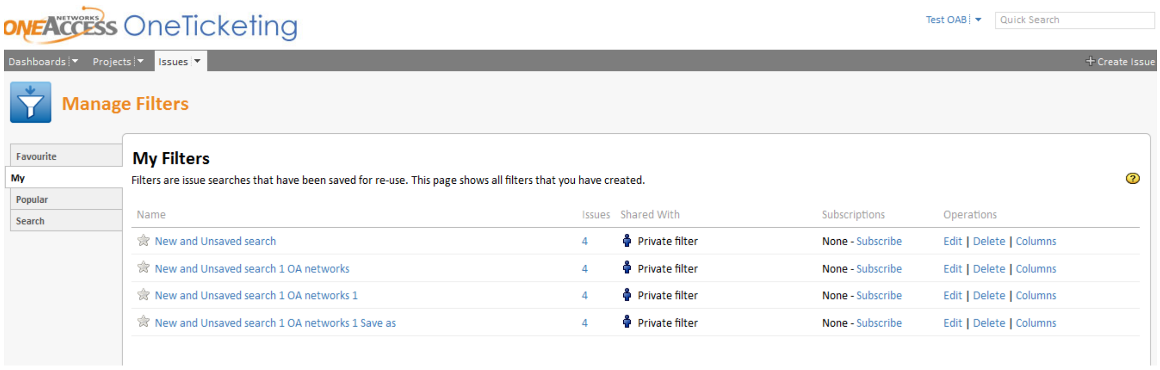
Clicking on the Edit link users will direct to edit filter page and they can edit the selected the filter name.

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.

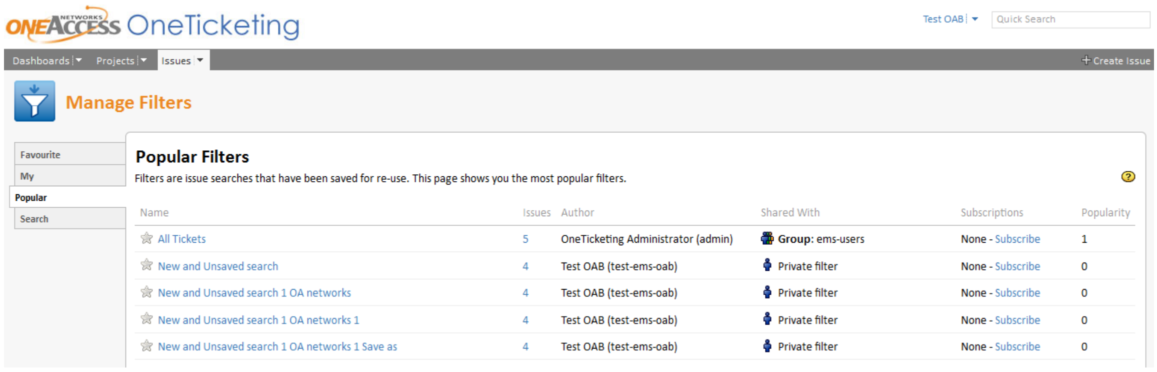
6.2.2 My Filters

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



6.2.3 Popular filter

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



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

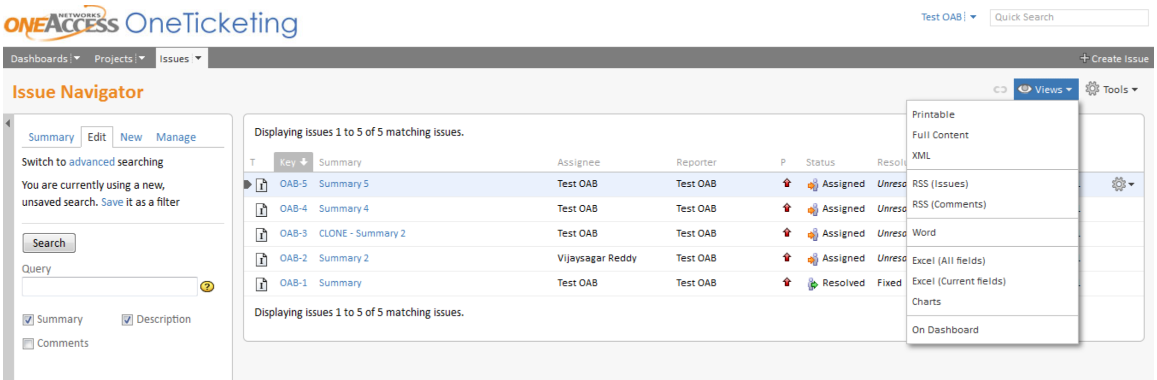
Login with user credentials=> Issues link/dropdown in the horizontal navigation => Manage tab/ Manage filters => Select left pane popular tab => Click on All Issues filter => User will get the all the issues related to that project.

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.



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).

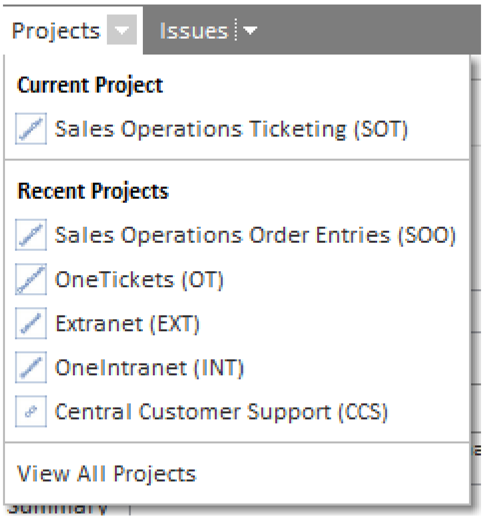
7. Dash Board

7.1 Dash Board

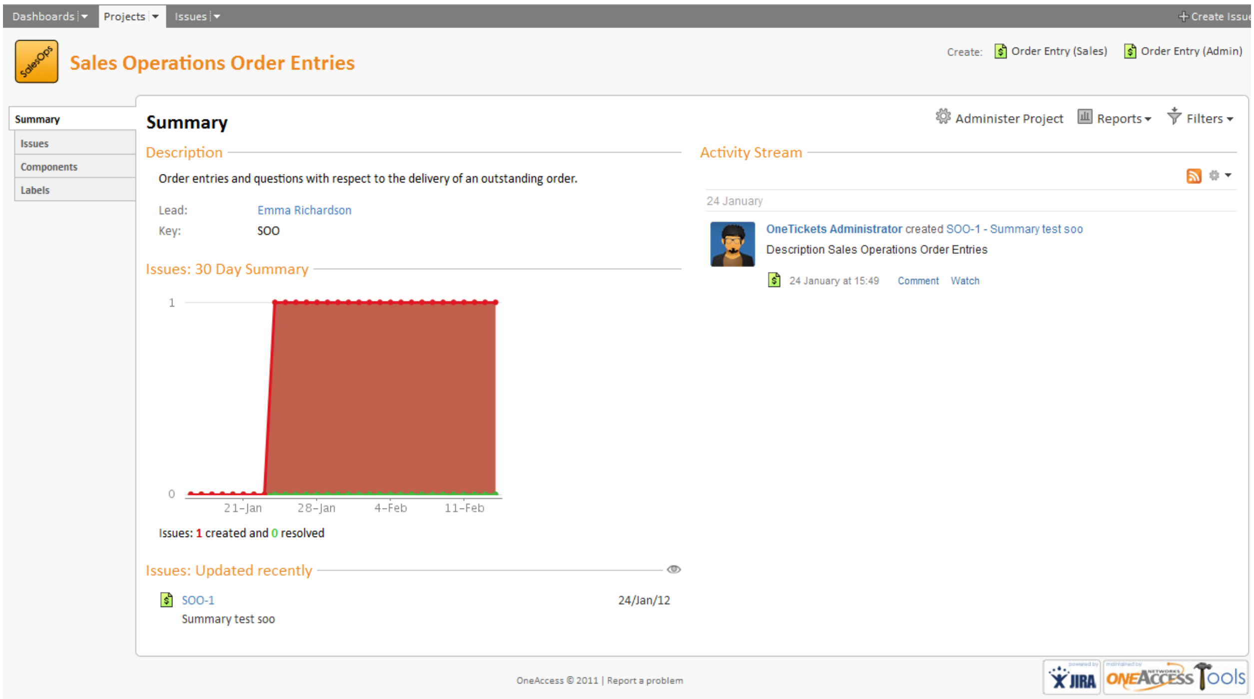
The Dashboard will show the Horizontal navigation bar with 3 tabs with the Create Issue link (Dashboards, Projects, Issues and Create Issue.

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.



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

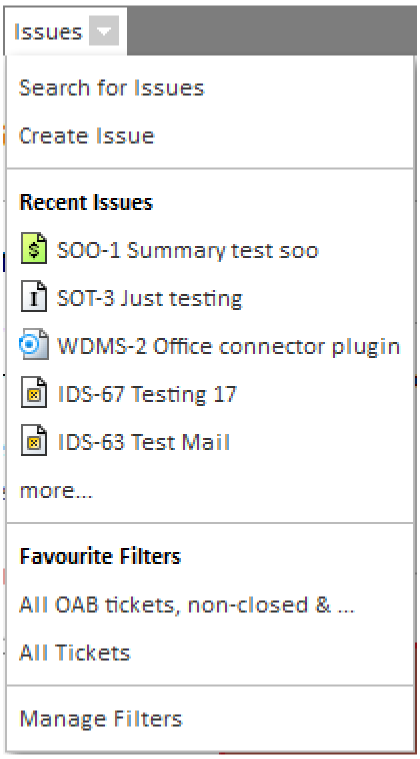


7.3 Issues

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

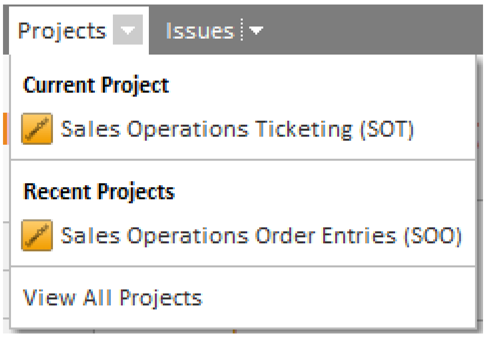
Search for Issues, Create Issue, Recent Issues list, Favorite filters list and Manage filters

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



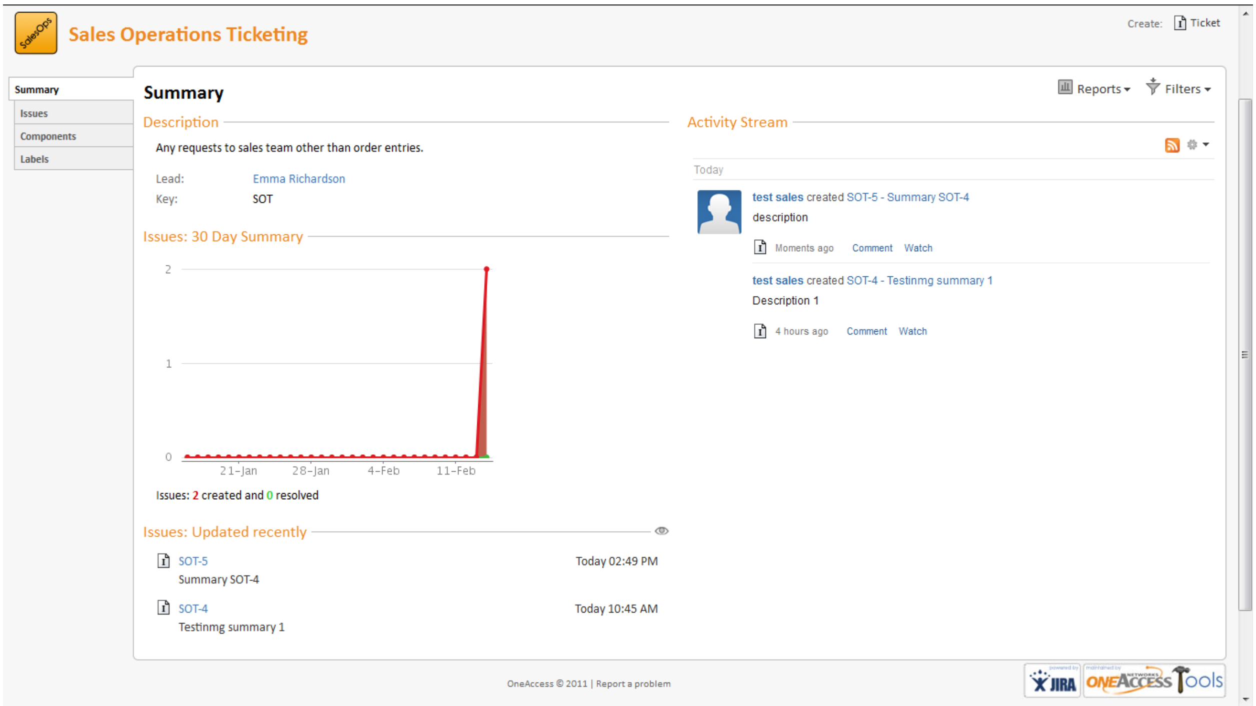
8. Browse Projects

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.



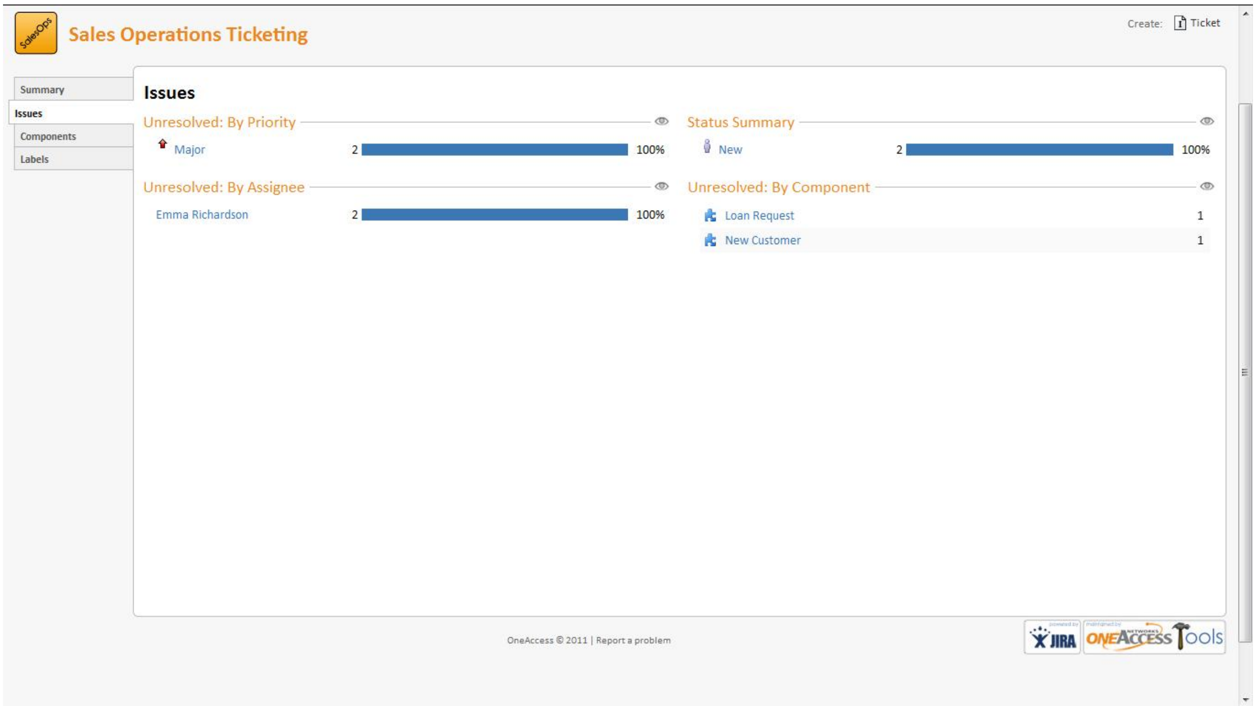
8.1 Summary:

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



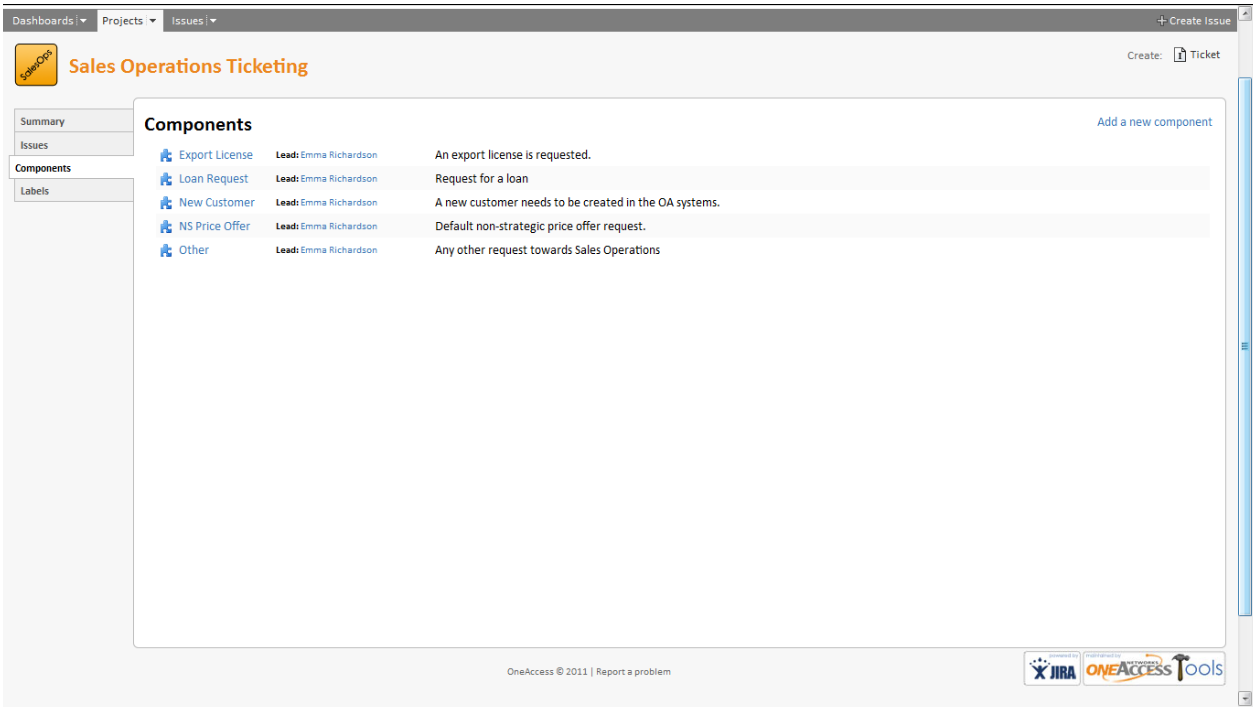
8.2 Issues

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



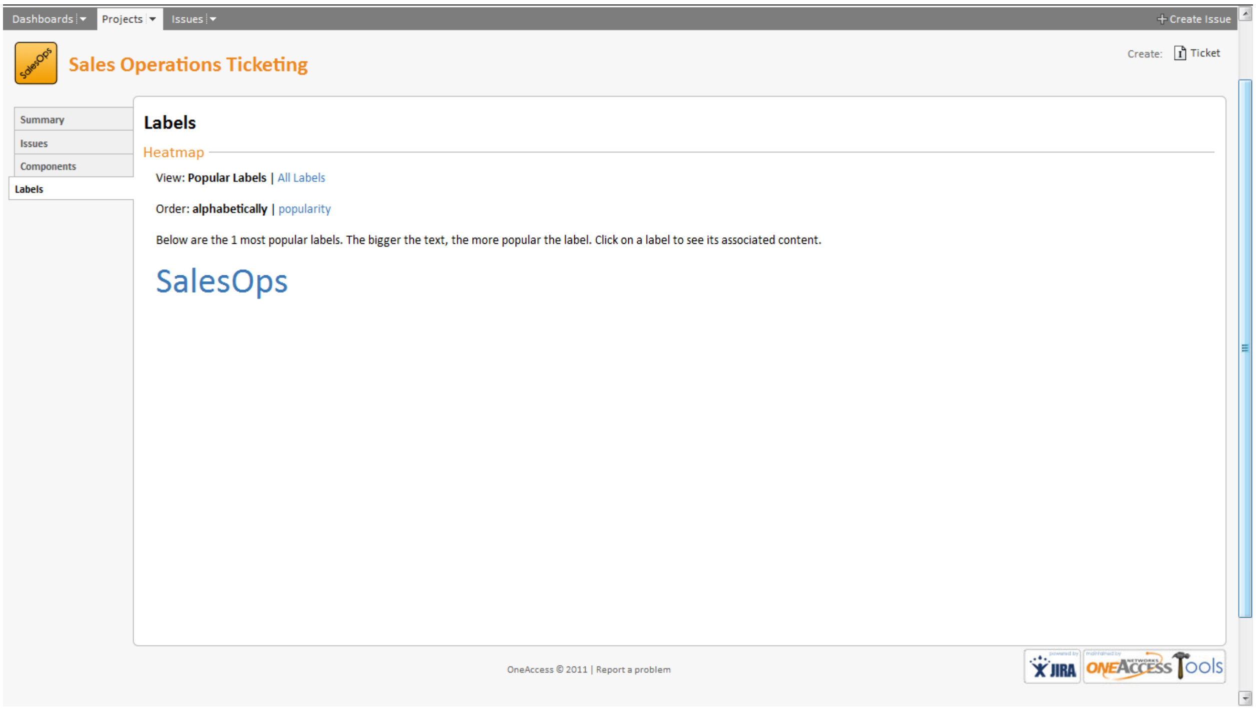
8.3 Components:

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.


Dashboards
Projects
Issues
Create Issue
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