NeuQS Standard Configuration Guide

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Document Control

Version	Date	Remarks
1.0		

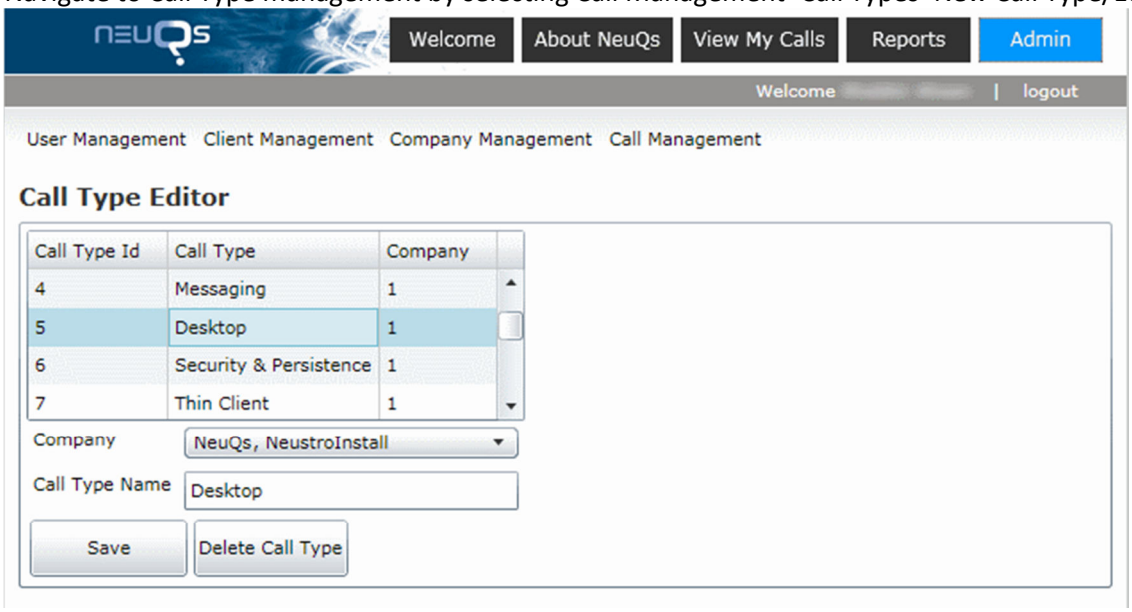
Requirements

- To configure NeuQS, you must be logged in as an administrator or super administrator.
- This document explains the administrator section of NeuQS, therefore it is assumed that the user has logged into the administration area.

Call Type Management

Call Type allows new calls to be organised into an overarching category. This helps the sorting and routing of calls. Several call types are preinstalled, but the can be removed/edited and new ones can be added to fit the requirements.

Navigate to Call Type management by selecting Call Management>Call Types>New Call Type/Edit Call Type



Edit Call Type

Most of the editing screens are similar within the administration section. A table will list the items which can be edited, and by selecting a row, the details will populate a form allowing them to be modified. Changes can be saved by clicking 'Save' or the entire record can be deleted by clicking on 'delete'.

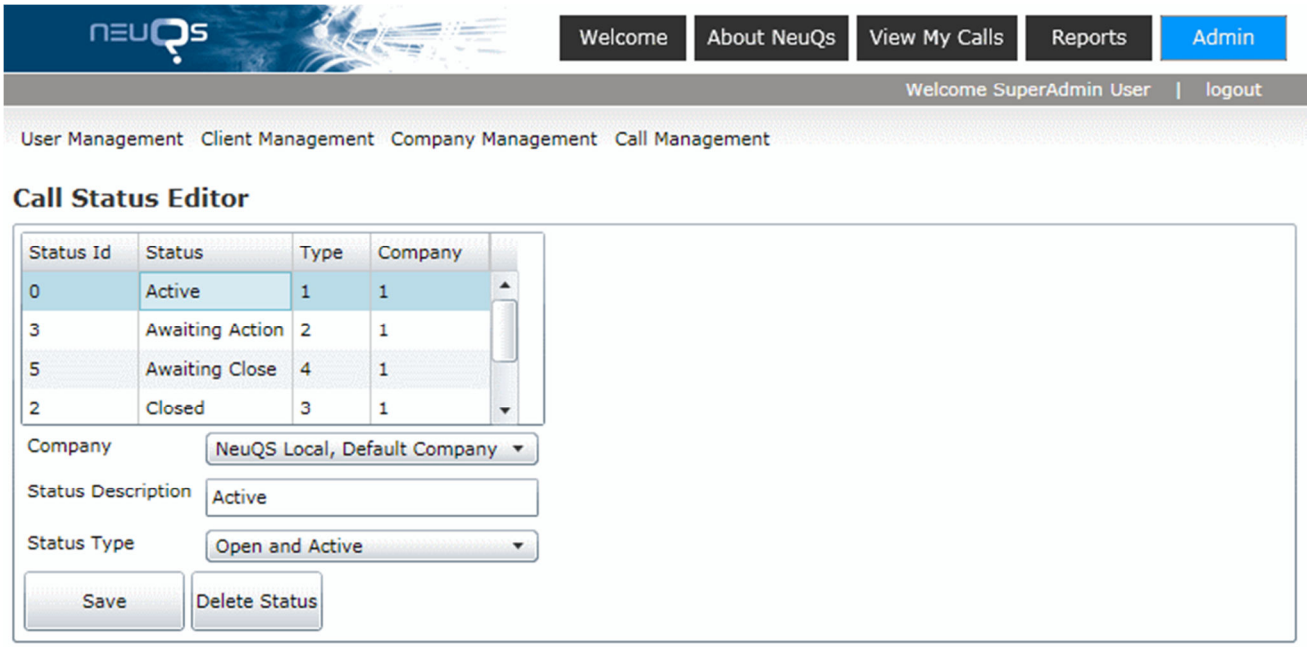
Call Status Management

A call is assigned one status at any time which indicates how a call is dealt with by NeuQS as well as how it will be managed by support operatives.

The call status is made up of:

1. Company -this links the status to the install making it available to all assigned to the install.
2. Status Description – this is what will be visible to the users when managing the call.
3. Status Type – this is used by NeuQS to manage how a call is listed and also managed. The options available are:
    a. Review required – this is the default call type set on a call which is created via email. Calls with this status will always appear at the top of the call list.
    b. Open and Active – these will appear in the call list under the calls due for a review. These will also be subject to highlighting based on the proximity to the due date.
    c. Awaiting Action – If a call is awaiting action (set via creating a new update), this will drop the call to the bottom of the list. Via the update, a time is set for the action to be completed. If a call on this status receives an email update from a user other than a support operative, the call status will automatically change to a status with the type 'review required'.

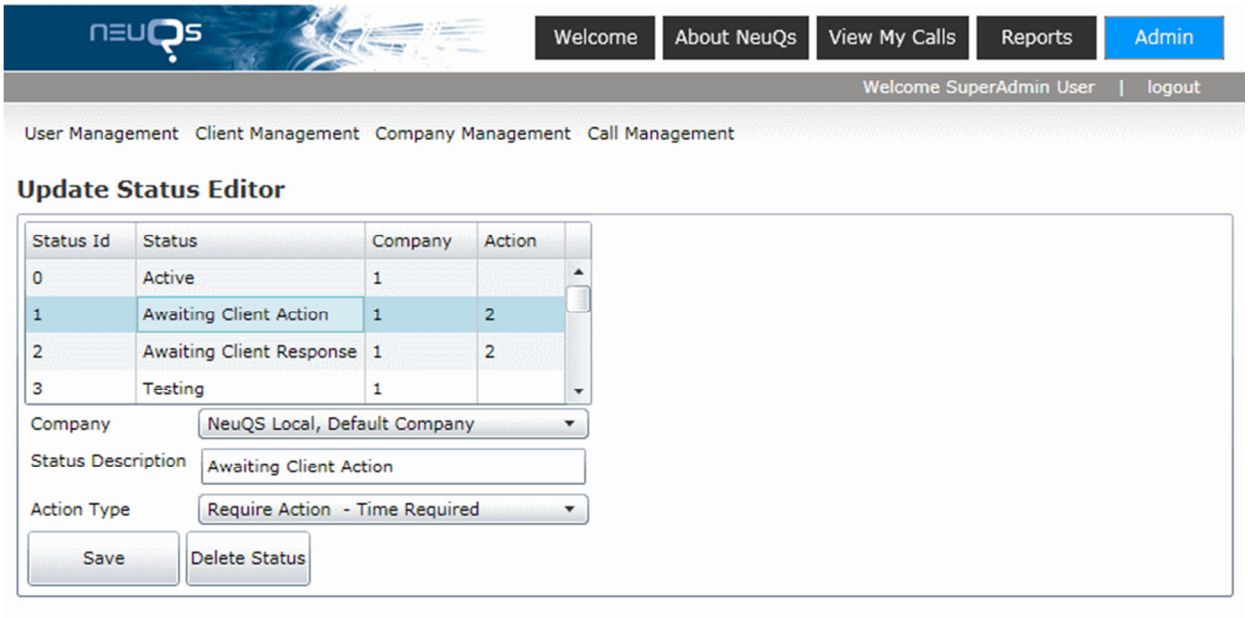
d. Closed – Calls with this status type will not appear on the list of calls, unless 'include closed calls' is set to true in the call listing filter.



Update Status Management

Each new update to a call is assigned an update status. The update status indicates the purpose of the update, but can impact on the call status.

Navigate to Call Management>Update Status>Add New Update Status/Edit Update Status



The update status make up is very similar to the call status:

1. Company – this links the update status to the install making it available to all assigned to the install.
2. Status Description – This is what the users will see when managing calls and also what will be shown to customers in emails.

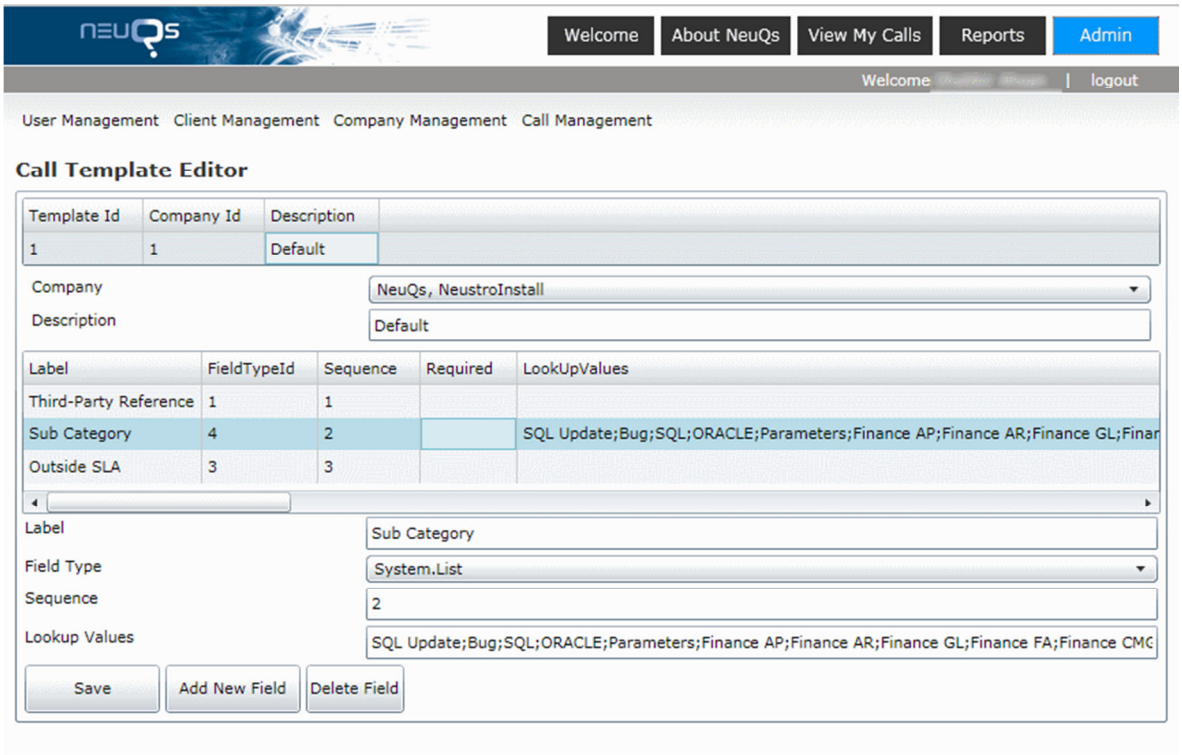
3. Action Type – The action type can be set to 'N/A' which means NeuQS will not treat it in a special way, but will be visible to the user. Other types include:
    a. Internal – an internal update is usually reserved for the change logs which are automatically generated, but also allow for support operatives to add updates to the call for internal consumption only – i.e. the client will not see them.
    b. Call Description – This update type will be highlighted in the call view as well as set to bold when call history is sent in an email.
    c. Pending Close of Call (Time required) – This update type requires the user to set a date and time for this update. This will set the call status to a status with a type of 'Awaiting Close'. When the pre-set time is reached, the call will automatically close.
    d. Require Action (Time required) – This update type also required the user to set a date and time. Once this time is reached and the action has not been cleared, the update with this status type will be automatically resent to all call assignees. Setting an update to this status will cause the call status to change to a status with type 'awaiting action'.
    e. Action Complete – this update type is used to clear an action. The clearing of an action can be done by selecting the update in the call view and clicking on the 'action update' button, or selecting the 'action all updates' button and selecting which action is to be updated. This will generate a new update with a status type of Action complete.

Call Extended Fields

NeuQS features the ability to add a number of fields to a call enabling focussed data capture.

Navigate to the extended field editor via Call Management>Call Extended Fields

The editor will automatically select the default install and list the extended fields which are installed. Selecting an existing field from the list will allow the details to be amended in the form underneath it or for it to be deleted. Selecting Add New Field will show just the form allowing the details to be entered. Clicking save on this form will return you to the edit form.



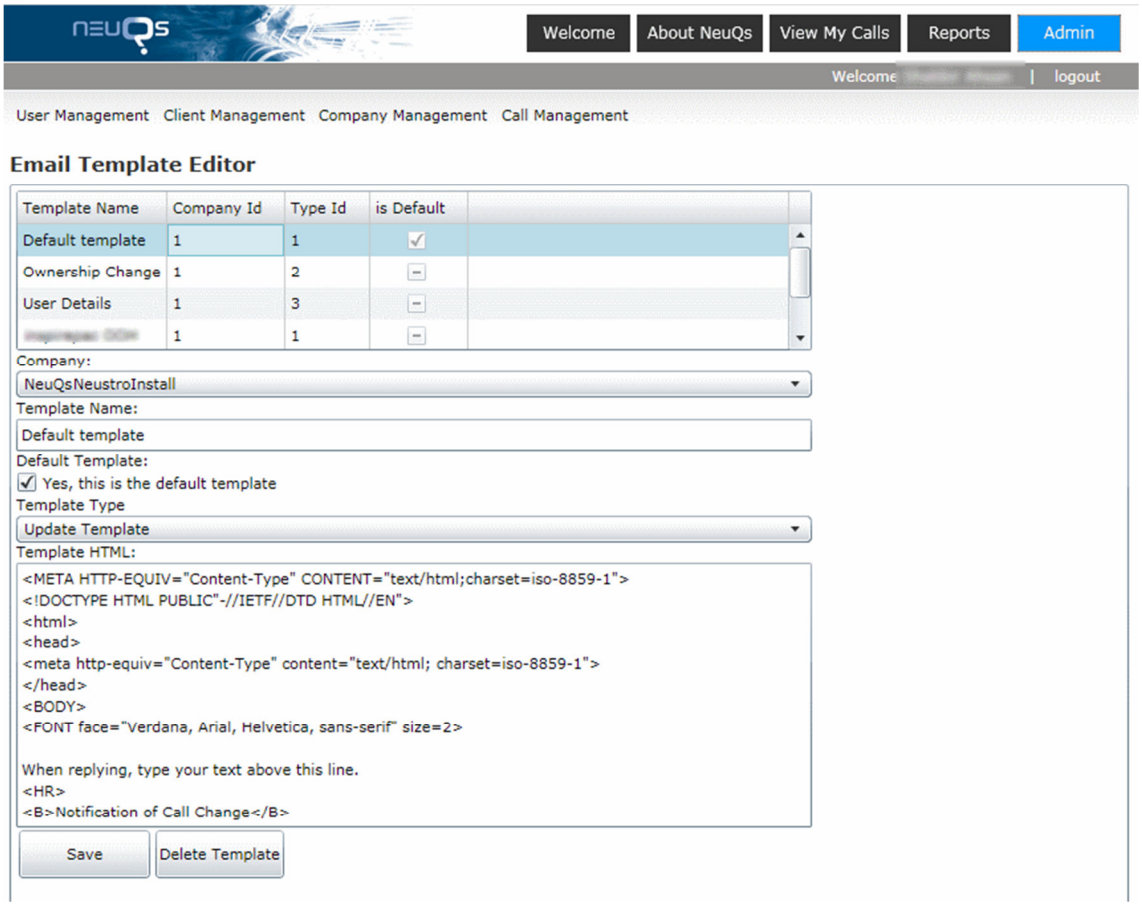
The Extended field is made up of the following:

1. Label – this is the label which will be assigned to the field and which will be visible to the support operative via the call management tool and to any assignees via email.
2. Field Type. There are currently four field types which generate different user controls:
    a. System.String – This indicates that the field is a simple textbox.
    b. System.DateTime – this indicates that a date and/or time is being captured. Selecting this type will generate a date select box
    c. System.Boolen – the field will accept either a true or false value and will be displayed as a checkbox.
    d. System.List – the field will display as a list displaying the items entered in the lookup values. This removes the possibility of incorrect entries.
3. Sequence – these fields will be displayed in order of the sequence. Any numerical value can be entered here.
4. Lookup Values – If the filed type is a list, then the data entered here will appear for the user to select. Please use a semi-colon (;) separated list.

Email Template Management

NeuQS will send out emails when any updates are created or new calls are created. These emails are customisable and new templates can be created for use when adding new updates and for specific purposes such as sending user details.

Navigate to Email template management from Call Management>Email Templates>New Email Template/ Edit Email Template



The Email template is made up of the following details:

1. Company - this links the email template to the install making it available to the current install.
2. Template Name – this is what will show to the user when selecting an update. Use a meaningful name.
3. Default Template – With this checked, the template will be set as the default ensuring it will be selected when a new update is created and also picked when a new call is generated.
4. Template Type – The template type indicates where this template can be used by NeuQS. They consist of:
    a. Update Template- this type of template is used when a call is generated or updates are added.
    b. Ownership Change – this type is used when an ownership change for a call is requested.
    c. User Details – this template type is used when sending out user details.
5. Template HTML – this is where the template is entered. The template is essentially HTML and has several keywords reserved. The keywords are entered as comments in the HTML, i.e. within the following tags: <!-- [keyword here] /-->. The available keywords are below:

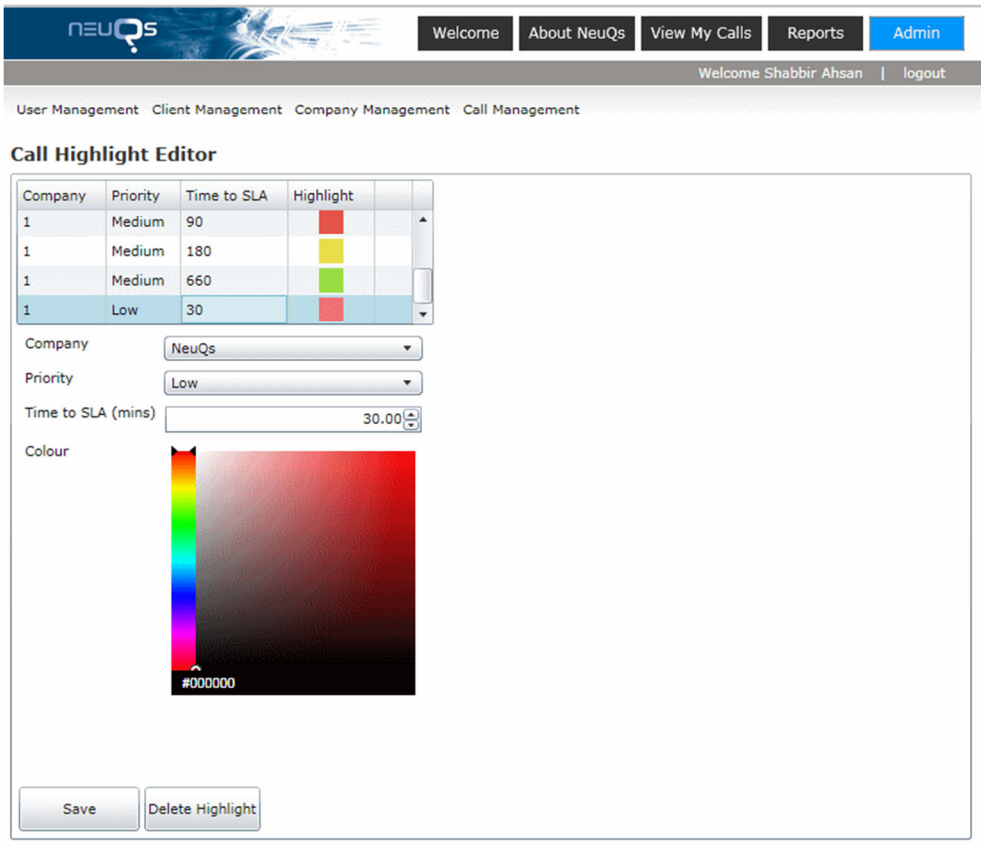
Keyword	Description	Where it is used
<!--Title/-->	The call title will be entered here	Update template, Ownership change
<!--UpdateTxt/-->	The text of an update will be placed here	Update template
<!--CallRef/-->	The call reference is entered here – this is a combination of the call id and company id	Update template, Ownership change

<!--CallId/-->	The call id is entered here	Update template, Ownership change
<!--Priority/-->	The call priority will be placed here	Update template
<!--CallStatus/-->	The call status will be placed here	Update template
<!--UpdateDate/-->	The date of the update is placed here	Update template
<!--UpdateTime/-->	The time of the update is placed here	Update template
<!--CreateDate/-->	The date the call was created is placed here	Update template
<!--CreateTime/-->	The time the call was opened	Update template
<!--CreatedBy/-->	The name of the person raising the call	Update template
<!--SiteUrl/-->	The url of the helpdesk (as entered in the company editor)	Update template, Ownership change
<!--History/-->	All the updates will be listed with this placed on the template – this depends if the user has selected to include call history	Update template
<!--Assignees/-->	A list of the assignees will be placed here	Update template
<!--Category/-->	The category of the call	Update template
<!-- UpdateStatus /-->	The status of the update	Update template
<!--OpenedFor/-->	The person for whom the call was opened for	Update template
<!--ExtendedFields/-->	If extended fields are being used, they will be placed as a list here	Update template
<!--CompanyName/-->	The name of the company/installation	Ownership change
<!--HelpdeskUrl/-->	The url for the helpdesk	User details
<!--FirstName/-->	The first name of the user will be placed here	User details
<!--LastName/-->	The first name of the user will be placed here	User details
<!--Username/-->	The last name of the user will be placed here	User details
<!--Password/-->	The password of the user will be placed here	User details

Call Highlight Management

Any active call which is listed can be highlighted based on the priority and the proximity to the SLA due date. This can be customised here.

Navigate to Call Management> Call Highlighting>New Call Highlight/Edit Call Highlight.



The data for call highlighting is stored in the following format:

- Company – this links the highlight to the install
- Priority – the priority for which this highlighting is to be applied on
- Time to SLA (mins) – time in minutes which should be remaining for the highlight to trigger
- Colour – pick a colour using the colour selector to use it.

Editing can be done by selecting a record from the table and then editing any of the values. Please note that when clicking on a record, the colour selector may show black instead of the colour – when clicking save, the colour will not be set to black unless the colour is explicitly selected (it is not advised setting the colour to black as text is rendered in black and therefore the call details will not be visible).

Troubleshooting

I click save and it takes me to the list of records but I cannot see my newly create one

Sometimes the data is entered but a cached copy of the data is shown. To ensure you are viewing the latest data, refresh the browser.

I have set up the Company, but emails are not being sent or picked up.

- Ensure the email settings you have entered are correct within NeuQS by editing the company.
- Ensure that both the CallTrackerMontior and CallTrackerService services are running.
- If there is a failure in starting, ensure the database is running.
- Please take a look at the event log to see if the service has logged any errors – full error information will be logged to ensure quick resolution.

Still having problems?

Please enter your details and any problems you are having on http://www.neuqs.com/support.aspx