

Hydra OMS demo: Support Request process: User manual (draft)

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1. Introduction

Current manual describes Support Request process in demo version of Hydra OMS (<http://demo.hydra-oms.com/>), "as is".

For internal use only.

2. Process description

It is possible to create three kinds of processes in the demo version of the system: "Vacation Request", "Support Request" and "Pizza Order". Current manual deals with the "Support Request".

The whole process of support request handling is shown in the process diagram below.

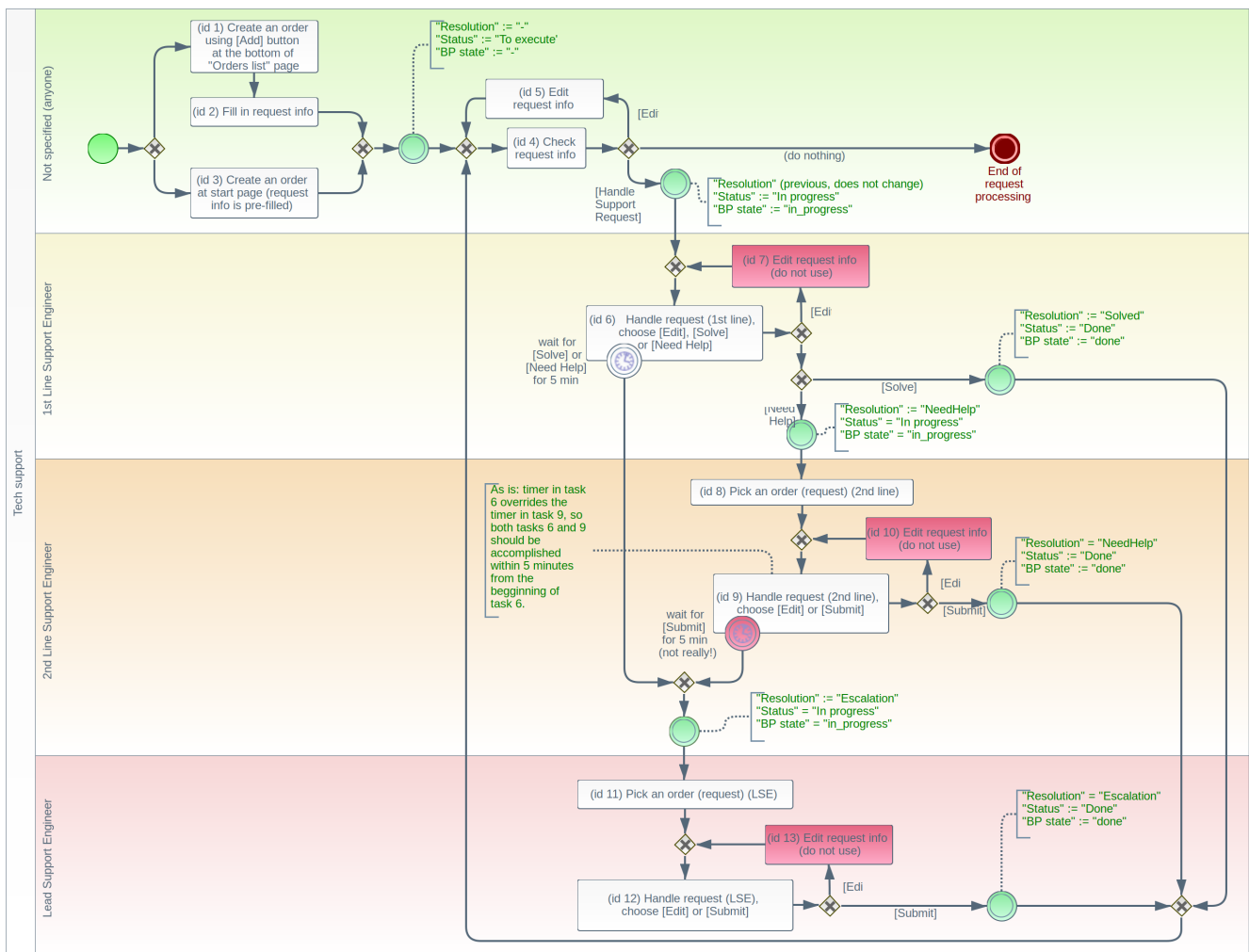
Tasks are depicted with rectangles with an id number.

Events are depicted as circles. There is a start event, end event and intermediate events (where "Resolution", "Status" and "Business process state", or "BP state", automatically change).

Branchings are depicted as diamonds with "X" sign.

Timers start at the beginning of the task they are attached to and redirect the process when the specified time ends.

See section 3 for screenshots.



Support Request process diagram

In the demo version of the system, in order to start the request handling process one should either create an empty order (request) (task 1), and fill in the data manually (task 2), or create an order (request) with automatically generated data (task 3).

Once the order (request) is created, one can check its data (task 4) and edit the data if necessary (task 5).

One should check that fields "Requester Name", "Requester Phone", "Subject" and "Description" are filled in correctly. It will be impossible to correct them properly at next stages.

Press "Handle Support Request" (see screenshot for task 4) to direct the order to the 1st line.

The 1st Line Support Engineer (task 6) might want to reload the page to see actual information in the lower part of the page.

There is a button [Edit] at the bottom of the page which leads to task 7, but any changes will be saved only temporarily (see notes).

He/she should fill in the field "Resolution" (text will be saved as "Resolution Text") and then decide whether the task is completed ([Solve] button), or should be redirected to the 2nd line ([Need Help] button).

If he/she spends more than 5 minutes solving the problem, the request (order) will be redirected to the Lead Support Engineer.

If [Solve] button was chosen in task 6, the page with request info (as in task 4) will be automatically loaded. Reload the page to see actual data. One can stop now or repeat the request handling.

If you press [Need Help] in task 6, the request (order) will be redirected to 2nd line.

The 2nd Line Support Engineer can pick up an order from the list under the right-most sign in the upper menu (task 8), or, in the demo version of the system, just automatically get the request (order).

He/she should reload the page with request info (see screenshot for task 9), to see the actual information.

There is a button [Edit] at the bottom of the page which leads to task 10, but any changes will be saved only temporarily (see notes).

He/she should solve the problem and press [Submit] button within the remainder of those 5 minutes that started at the beginning of task 6.

In this case the page with request info (as in task 4) is automatically loaded. Reload the page to see actual data. One can stop now or repeat the request handling.

If he/she doesn't meet the deadline, the request (order) will be redirected to the Lead Support Engineer.

The Lead Support Engineer, in his turn, can pick up an order from the list under the right-most sign in the upper menu (task 11), or, in the demo version of the system, just automatically get the request (order).

He/she should reload the page with request info (see screenshot for task 12), to see the actual information.

There is a button [Edit] at the bottom of the page which leads to task 13, but any changes will be saved only temporarily (see notes).

He/she should solve the problem and press [Submit] button.

The page with request info (as in task 4) is automatically loaded. Reload the page to see actual data. One can stop now or repeat the request handling.

Notes:

- some data fields should not be filled in or edited manually since they get overwritten automatically (namely, "Resolution" and "Resolution Text" fields);
- request data on pages corresponding to tasks 4, 6 (below), 9 (below), 12 (below) (see screenshots in section 3) do not show updated as the page loads. To see actual data one should reload the page;
- at the moment it is not possible to edit request info after the request was directed to handling (tasks 7, 10, 13). Data are saved temporarily, but at the end of the process all changes get cancelled;
- by design (as is written in orange banners), there are 5 minutes for the 1st line (task 6) and 5 minutes for the 2nd line (task 9) to handle the request. The timer in task 6 does not get cancelled as the process passes to task 9 though, so presently task 9 has to be completed within 5 minutes from the start of task 6. Editing (tasks 7 and 10) is included in this time, but is strictly not recommended, see the above note;
- in demo version, the roles of participants are not strictly separated, so it looks like the first tasks

can be done by any participant. At the end of processing the system redirects all the participants to task 4 ("Check request info"). No formal end of process is organized, so the participant is supposed either to do nothing, or to become the 1st Level Support Engineer and handle the process again;

- tasks 8 and 11 (picking a redirected order) in the demo version of the system are not mandatory, redirection is done automatically.

3. Screenshots

3.1. Task 1: Create a new order using [Add] button at *Orders list* page

Orders

David

Orders list

Filter orders

Search for an order

Order type

Order type

User name

* David Jones *

* Empty *

Creation date

From 01/08/2023 12:00 AM

To 01/09/2023 11:59 PM

Search

Order status


Order status

Archived

No

Code	Order type	Status	Created at	User	Ext. code	Archived
ORD-14	Support Request	<input type="checkbox"/> To execute	01/09/2023 18:55 PM			
ORD-13	Pizza Order	<input type="checkbox"/> To execute	01/09/2023 18:49 PM			
ORD-12	Support Request	<input checked="" type="checkbox"/> In progress	01/09/2023 18:43 PM	David Jones		
ORD-11	Support Request	<input type="checkbox"/> To execute	01/09/2023 18:26 PM			
ORD-10	Support Request	<input type="checkbox"/> To execute	01/09/2023 18:08 PM			
ORD-9	Pizza Order	<input type="checkbox"/> To execute	01/09/2023 17:50 PM			
ORD-8	Vacation Request	<input type="checkbox"/> To execute	01/09/2023 17:03 PM	David Jones		
ORD-7	Vacation Request	<input checked="" type="checkbox"/> Done	01/09/2023 16:57 PM	David Jones		
ORD-6	Vacation Request	<input type="checkbox"/> To execute	01/09/2023 16:57 PM			
ORD-5	Pizza Order	<input type="checkbox"/> To execute	01/09/2023 13:41 PM			
ORD-4	Pizza Order	<input type="checkbox"/> To execute	01/09/2023 06:02 AM			

Add

 **Press [Add] to create a new order**

Task 1: Create a new order using [Add] button at Orders list page

3.2. Task 2: Input request info manually

Orders

David

Adding order

Order type

Support Request

Requester Name

Mr. Smith

Requester Phone

1234567890

Subject

any subject

Description

something about the problem

Resolution

Resolution Text

Add

Choose "Support Request"

Fill in

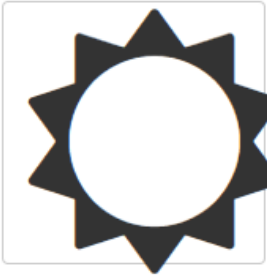
Do not fill in (leave as is)

press when finished

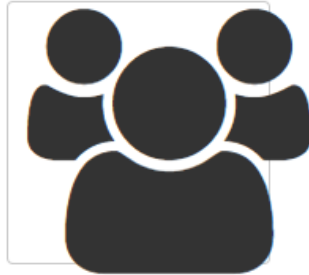
Task 2: Input request info manually

3.3. Task 3: Create a new order at start page

Select Order Type to Create



Vacation Request



Support Request

Choose "Support Request"



Pizza Order

Task 3: Create a new order at start page

3.4. Task 4: Check request info

Orders

David

ORD-14 Support Request

Handle Support Request

Requester Name: Peter Park

Requester Phone: 12345678900

Subject: Printer does not work

Description:
I don't know what happened but printer in kitchen does not work.
Help, please...

Resolution: —

Resolution Text: —

External code: —

User: —

Status: ☐ To execute

Archived: —

Created at: 01/09/2023 18:55 PM

Business process state: —

Business process id: —

Completed at: —

Edit

(update page to see actual data)

Press [Handle Support Request] to forward the order to 1st Line Support Engineer

Press [Edit] to change these data

Task 4: Check request info

3.5. Task 5: Edit request info

Orders

David

ORD-14

Requester Name

Peter Park

Requester Phone

12345678900

Subject

Printer does not work

Description

I don't know what happened but printer

Resolution

Resolution Text

Update Order

Correct these data

Do not change these lines
(leave as is)

press when finished

Task 5: Edit request info

3.6. Task 6: Handle request at 1st line

Orders

David 2

ORD-15 Support Request

mind the time

Support Request

Handle Request

If you don't complete this task in 5 minutes it will be automatically escalated to Lead Support Engineer

Request Data

Requester Name

Mr. Smith

Requester Phone

+1 (234) 567-89-0

Subject

any subject

Description

something about the problem

Request Resolution

Resolution

Tried to fix

**Fill in the "Resolution" field
(this will be saved as "Resolution Text")**

Solve

Need Help

Press [Solve] if you've solved the client's problem or press [Need Help] to redirect the request to 2nd line.

Requester Name: Mr. Smith

Requester Phone: 1234567890

Subject: any subject

Description: something about the problem

Resolution: —

Resolution Text: —

External code: —

User: David Jones

Status: In progress

Archived: —

Created at: 01/09/2023 19:06 PM

Business process state: in_progress

Business process id: 100206

Completed at: —

Edit

**Only for reference.
Update page to see actual data.
Do not edit using [Edit] button
on this page**

Task 6: Handle request at 1st line

3.7. Task 8: Pick an order / request (2nd line)

Orders

David

Orders list

Filter orders

Search for an order

Order type

Order type

User name

* David Jones

* Empty

Creation date

From

01/09/2023 12:00 AM

To

01/10/2023 11:59 PM

Order status

Order status

Archived

No

Code	Order type	Status	Created at	User
ORD-20	Support Request	In progress	01/10/2023 12:44 PM	David Jones
ORD-19	Pizza Order	<input type="checkbox"/> To execute	01/10/2023 12:44 PM	David Jones
ORD-18	Support Request	In progress	01/10/2023 11:57 AM	David Jones
ORD-17	Support Request	<input type="checkbox"/> To execute	01/10/2023 11:54 AM	David Jones
ORD-16	Support Request	In progress	01/10/2023 11:44 AM	David Jones
ORD-15	Support Request	In progress	01/10/2023 11:42 AM	David Jones
ORD-14	Support Request	<input type="checkbox"/> To execute	01/10/2023 11:41 AM	David Jones
ORD-13	Support Request	In progress	01/10/2023 11:40 AM	David Jones
ORD-12	Support Request	<input type="checkbox"/> To execute	01/10/2023 11:39 AM	David Jones
ORD-11	Support Request	In progress	01/10/2023 11:29 AM	David Jones
ORD-10	Support Request	In progress	01/10/2023 11:11 AM	David Jones
ORD-9	Support Request	In progress	01/10/2023 10:57 AM	David Jones
ORD-8	Support Request	<input type="checkbox"/> To execute	01/10/2023 10:44 AM	David Jones
ORD-7	Support Request	In progress	01/10/2023 09:42 AM	David Jones
ORD-6	Pizza Order	<input checked="" type="checkbox"/> Done	01/10/2023 09:13 AM	David Jones
ORD-5	Vacation Request	<input type="checkbox"/> To execute	01/10/2023 09:13 AM	David Jones
ORD-4	Support Request	<input type="checkbox"/> To execute	01/10/2023 08:39 AM	David Jones

Add

Tasks

- ORD-7 – Hand Over Request by Escalation
- ORD-10 – Hand Over Request by Escalation
- ORD-11 – Hand Over Request by Escalation
- ORD-9 – Hand Over Request by Escalation
- ORD-13 – Hand Over Request by Escalation
- ORD-15 – Hand Over Request by Escalation
- ORD-16 – Hand Over Request by Escalation
- ORD-18 – Hand Over Request by Escalation
- ORD-20 – Handle Request by 2 Level Support

Pick an order
(see lines ending with
"Handle Request by
2 Level Support")

Task 8: Pick an order / request (2nd line)

3.8. Task 9: Handle request at 2nd line

Orders

David

ORD-14 Support Request

Support Request

Handle Request by 2 Level Support

You are performing this task as the 2nd Line Support Engineer
In production mode this task is invisible for 1st Line Support Engineer and should be done by 2nd Line Support Engineer

If you don't complete this task in 5 minutes it will be automatically escalated to Lead Support Engineer

Request Data

Requester Name

Peter Park

Requester Phone

+1 (234) 567-89-00

Subject

Printer does not work

Description

I don't know what happened but printer in kitchen does not work. Help, please...

Request Resolution

Resolution

Fixed this and that

Submit

Press [Submit] when you get the problem solved.

Requester Name: Peter Park

Requester Phone: 12345678900

Subject: Printer does not work

Description:
I don't know what happened but printer in kitchen does not work.
Help, please...

Resolution: NeedHelp

Resolution Text: —

External code: —

User: David Jones

Status: In progress

Archived: —

Created at: 01/09/2023 18:55 PM

Business process state: in_progress

Business process id: 100330

Completed at: —

Edit

Only for reference.
Update page to see actual data.
Do not edit using [Edit] button
on this page

Task 9: Handle request at 2nd line

3.9. Task 11: Pick an order / request (Lead Support Engineer)

Orders

David

Orders list

Filter orders

Search for an order

Order type

Order type

User name

* David Jones *

* Empty *

Creation date

From

01/08/2023 12:00 AM

To

01/09/2023 11:59 PM

Order status

Order status

Archived

No

Code	Order type	Status	Created at	User
ORD-17	Support Request	In progress	01/09/2023 19:15 PM	David Jones
ORD-16	Pizza Order	<input type="checkbox"/> To execute	01/09/2023 19:09 PM	
ORD-15	Support Request	<input checked="" type="checkbox"/> Done	01/09/2023 19:06 PM	David Jones
ORD-14	Support Request	In progress	01/09/2023 18:55 PM	David Jones
ORD-13	Pizza Order	<input type="checkbox"/> To execute	01/09/2023 18:49 PM	
ORD-12	Support Request	In progress	01/09/2023 18:43 PM	David Jones
ORD-11	Support Request	<input type="checkbox"/> To execute	01/09/2023 18:26 PM	
ORD-10	Support Request	<input type="checkbox"/> To execute	01/09/2023 18:08 PM	
ORD-9	Pizza Order	<input type="checkbox"/> To execute	01/09/2023 17:50 PM	
ORD-8	Vacation Request	<input type="checkbox"/> To execute	01/09/2023 17:03 PM	David Jones
ORD-7	Vacation Request	<input checked="" type="checkbox"/> Done	01/09/2023 16:57 PM	David Jones
ORD-6	Vacation Request	<input type="checkbox"/> To execute	01/09/2023 16:57 PM	
ORD-5	Pizza Order	<input type="checkbox"/> To execute	01/09/2023 13:41 PM	
ORD-4	Pizza Order	<input type="checkbox"/> To execute	01/09/2023 06:02 AM	

Add

Tasks

- ORD-12 – Hand Over Request by Escalation
- ORD-17 – Hand Over Request by Escalation
- ORD-14 – Handle Request by 2 Level Support

Pick an order (see lines ending with "Hand Over Request by Escalation")

Task 11: Pick an order / request (Lead Support Engineer)

3.10. Task 12: Handle request (Lead Support Engineer)

Orders

David

ORD-15 Support Request

Support Request

Hand Over Request by Escalation

You are performing this task as the **Lead Support Engineer** by escalation

In production mode this task is invisible for 1st and 2nd Line Support Engineers and should be done by Lead Support Engineer

Request Data

Requester Name

Mr. Smith

Requester Phone

+1 (234) 567-89-0

Subject

any subject

Description

something about the problem

Request Resolution

Resolution

fixed everything

**Fill in the "Resolution" field
(this will be saved as "Resolution Text")**

Submit

Press [Submit] when you get the problem solved.

Requester Name: Mr. Smith

Requester Phone: 1234567890

Subject: any subject

Description: something about the problem

Resolution: Escalation

Resolution Text: Tried to fix

External code: —

User: David Jones

Status: 0% In progress

Archived: —

Created at: 01/09/2023 19:06 PM

Business process state: in_progress

Business process id: 100206

Completed at: —

Edit

**Only for reference.
Update page to see actual data.
Do not edit using [Edit] button
on this page**

Task 12: Handle request (Lead Support Engineer)