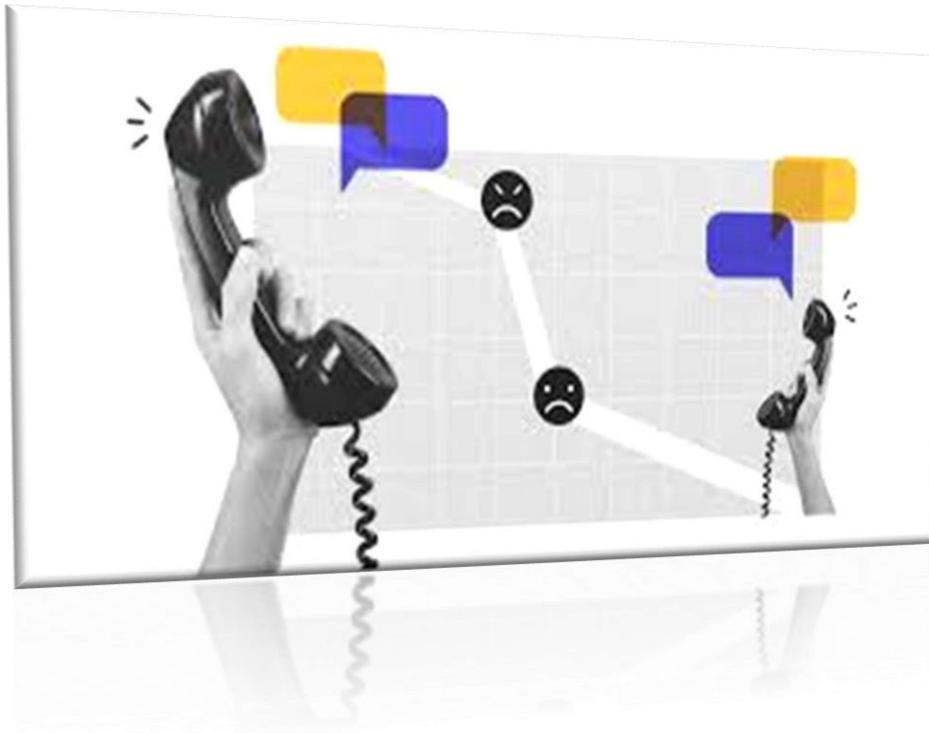


User Guide for **Client Escalation Management (CEM)**



Zenclient escalations

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1. Introduction

1.1. Purpose of the Tool

The Client Escalation Tool is designed to streamline the process of managing and resolving Client escalations effectively. Its primary purpose is to provide a structured and efficient way to address Client escalations. By using this application, the organization can ensure that Client escalations are handled promptly, leading to improved Client satisfaction and retention.

1.2. Scope

The Client Escalation Management application is an essential component of Client support and service management. It is used to handle situations where Clients are dissatisfied, have concerns, or face unresolved issues. The purpose of such an application is to efficiently address and resolve Client escalations, thereby improving Client satisfaction and maintaining a positive business reputation. Anyone who has received the Client Escalation within the Organization can register the escalation in the system.

1.2.1. Issue Resolution Management

At its core, the CEM application is designed to manage and streamline the resolution of Client issues that have escalated beyond the initial support level. This includes handling complex problems, dissatisfaction, or unresolved concerns.

1.2.2. Customer Satisfaction Enhancement

One of the primary goals of the application is to enhance Client satisfaction. By promptly and effectively addressing escalated issues, businesses can turn dissatisfied Clients into loyal advocates. This, in turn, can lead to increased Client retention and long-term profitability.

1.2.3. Data Collection and Analysis

The application collects and stores data related to Client escalations. This data can be analyzed to identify recurring problems, trends, and areas for improvement. It also helps in making data-driven decisions to enhance products, services, and processes.

1.2.4. Root Cause Analysis and Action Planning

CEM application provides features for performing root cause analysis. Efficient way to define immediate and long-term fixes actions is key. Teams can assign owners for every action and track on frequent basis, ensuring that they are handled in a structured and organized manner.

1.2.5. Communication and Transparency

Effective communication is a vital aspect of the application's scope. It facilitates communication between delivery & the teams involved, keeping all informed about the progress of their actions and expected resolutions. Transparency builds trust and helps handle situations better.

1.2.6. Training and Development Support

The scope also extends to staff training and development. Data collected through the application can highlight areas where additional training or resources are needed for support staff, leading to ongoing improvement in service quality.

1.3. Key Benefits

1. **Efficient Resolution:** The application facilitates the quick and organized resolution of Client escalations, reducing response times and enhancing Client satisfaction.
2. **Enhanced Collaboration:** It promotes collaboration among various teams, enabling them to work together to resolve complex issues.
3. **Transparent Tracking:** Users can track the progress of escalations in real-time, ensuring transparency and accountability.
4. **Data-Driven Insights:** The application provides valuable data and analytics to help organizations identify trends, bottlenecks, and areas for improvement in their client support processes.

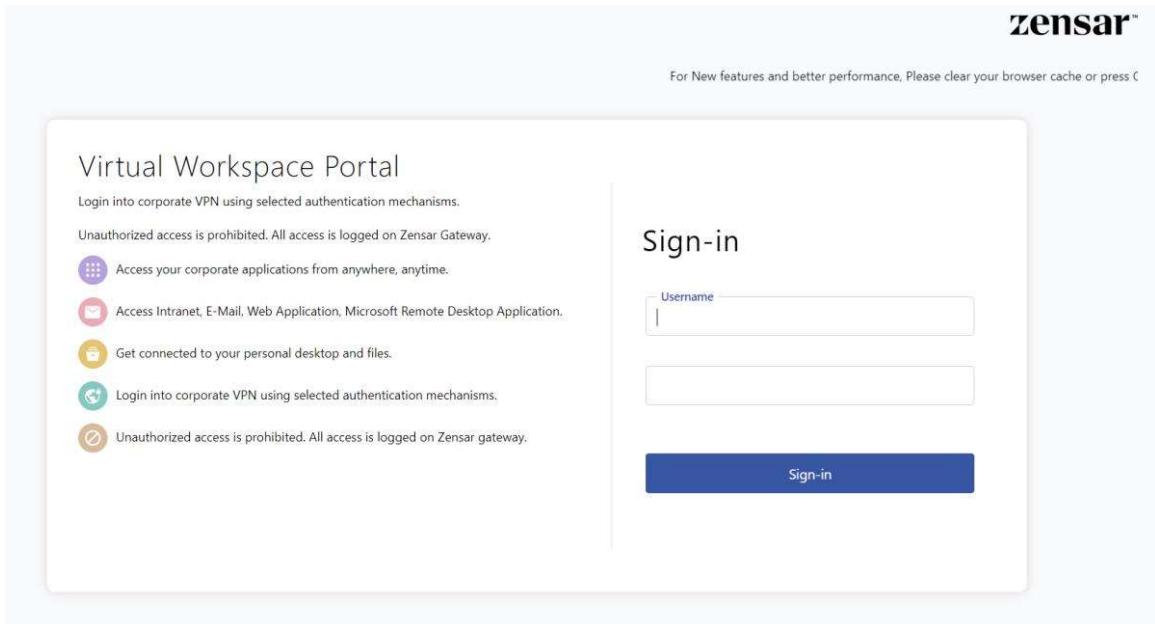
2. Getting Started

2.1 Accessing the Tool

To access the Client Escalation Tool, users typically need valid Zensar Credentials to access Tool on Single Sign On (SSO). This section guides users on where and how to access the application, whether it's a web portal, desktop application, or mobile app.

To access the application, click on – <https://clientescalations.zensar.com>

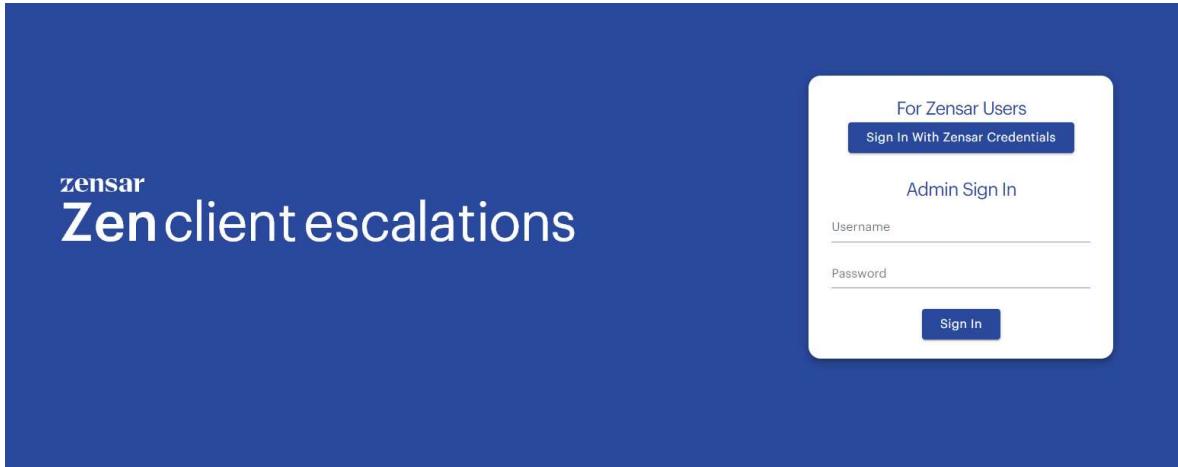
OR access through -> Single Sign-On (SSO) app -> ZenClientEscalations



2.2 Logging In

Instructions for the login process, including entering Zensar's credentials. It also covers additional security measures such as two-factor authentication (2FA) implemented using Single Sign On (SSO).

Super Admin can login with 'Admin Sign-In' option and normal users can login with 'Sign in with Zensar Credentials' option

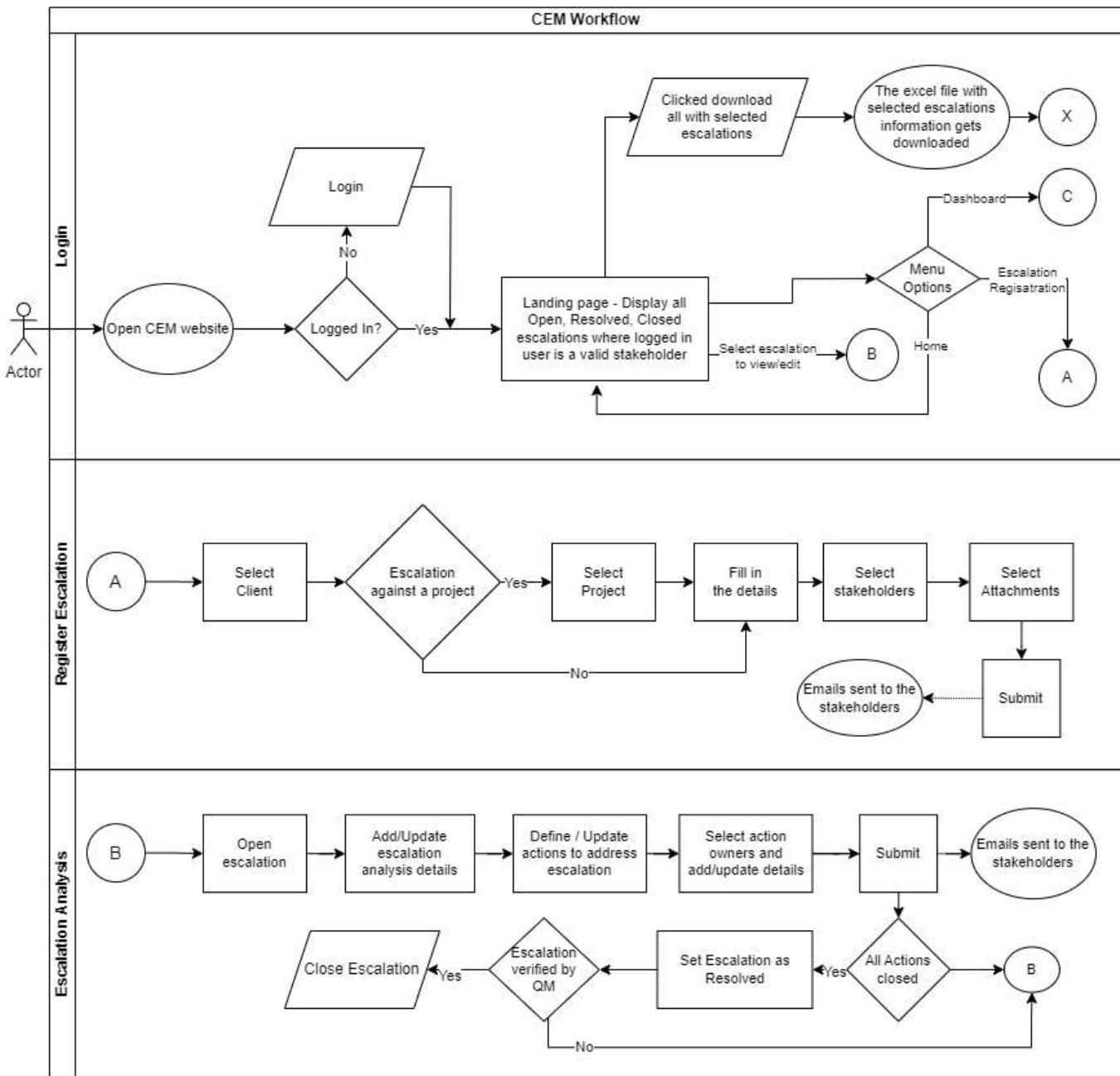


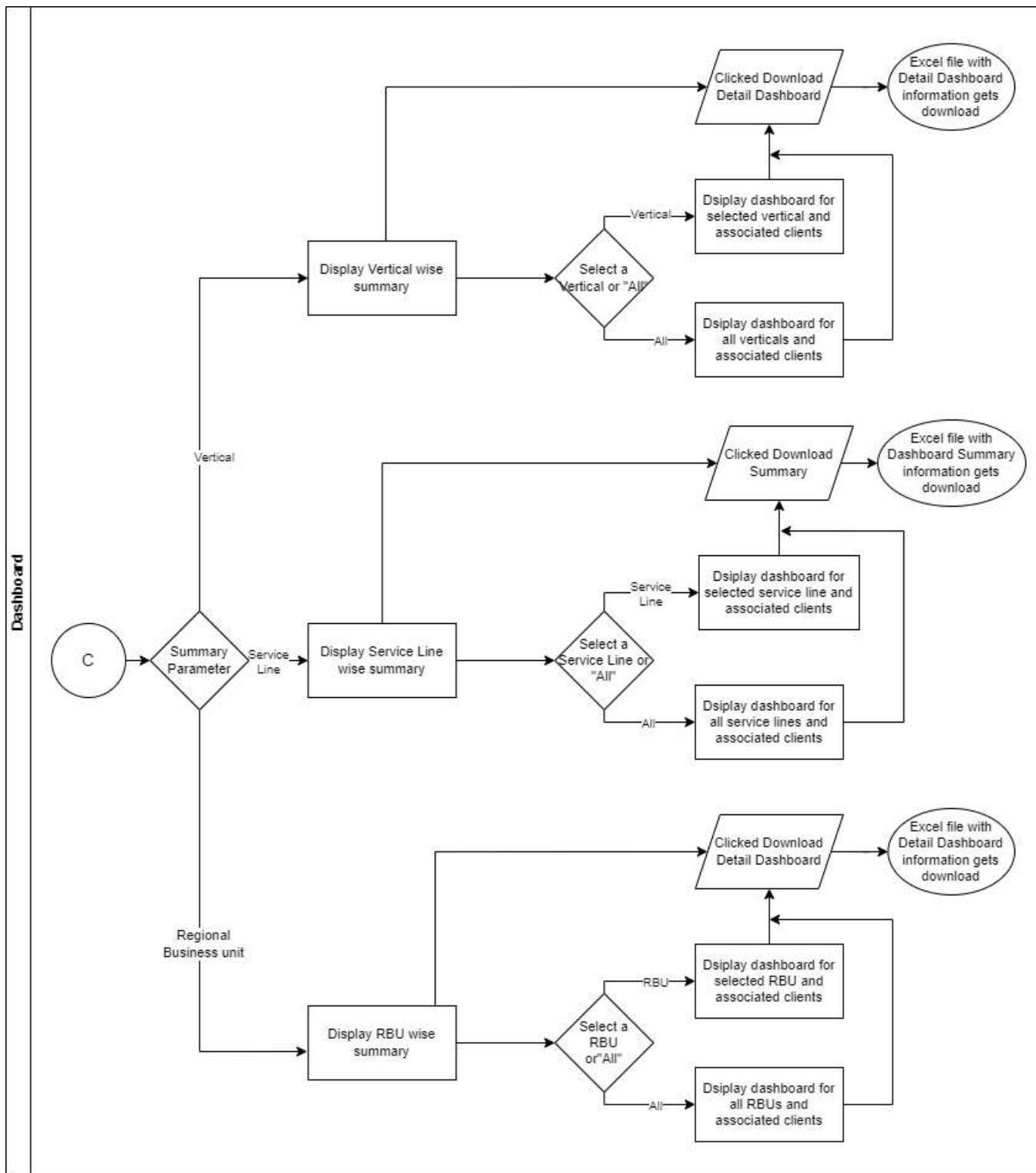
2.3 User Types & Roles

User roles define the level of access and permissions within the application. This section explains the different roles such as (e.g., Normal User, Admin, Super-Admin) and what each role can do. It's crucial for ensuring that users have the right level of access.

#	User Type	Roles	Access levels
1	Normal	Project Manager, Program Manager, Delivery Head, Vertical Head, Client Partner, Account Manager, SL Head, Quality Manger, Escalation Owners, Escalation Accountable, Action Owners	These roles can view escalations where they have been identified as stakeholder
2	Admin	CEO, COO, CQO	These roles are provided with Admin access to view all escalations, Edit QA Analysis
3	Quality	Quality Manager	He has access to download all escalation, only view access of escalation, Edit QA Analysis, he can close escalation where he is a part of that escalation.
4	Super Admin	Super Administrator of CEM	He has access to all escalations as well as additional

2.4 Workflow





3. Functionality Overview

3.1 Landing / Home Page

Upon successful login, the user is directed to the Landing/Home Page of the web application where we can find that there are three accordions with Search, Open & Resolved and Closed Accordions. At the last we Have a Download All button which can be used to download all the Escalations that have been registered in which user is stakeholder in the escalation and the information's that are downloaded is present in Annexure 1.

The screenshot shows the landing page of the Zenclient escalations application. On the left is a vertical navigation bar with icons for Home, Logout, and other system functions. The main content area has a header "Zenclient escalations" and a user profile "Sachin Kotapure". Below the header is a search bar labeled "Search Escalation" with dropdowns for "Vertical", "Service Line", "RBU", and "Project Ownership". The main content area displays an "Open & Resolved Escalations" table with columns: Esc. Id, Vertical, Ownership, RBU, Client, Project, Subject, Registration Date, Ageing, and Status. Five rows of data are shown, each with a checkbox in the first column. Below the table are buttons for "Rows per page" (set to 5), "1-5 of 22", and a "DOWNLOAD ALL" button. There is also a "Closed Escalations" section below the table. The footer includes copyright information "Copyright ©2024 Zensar Technologies." and the Zensar logo.

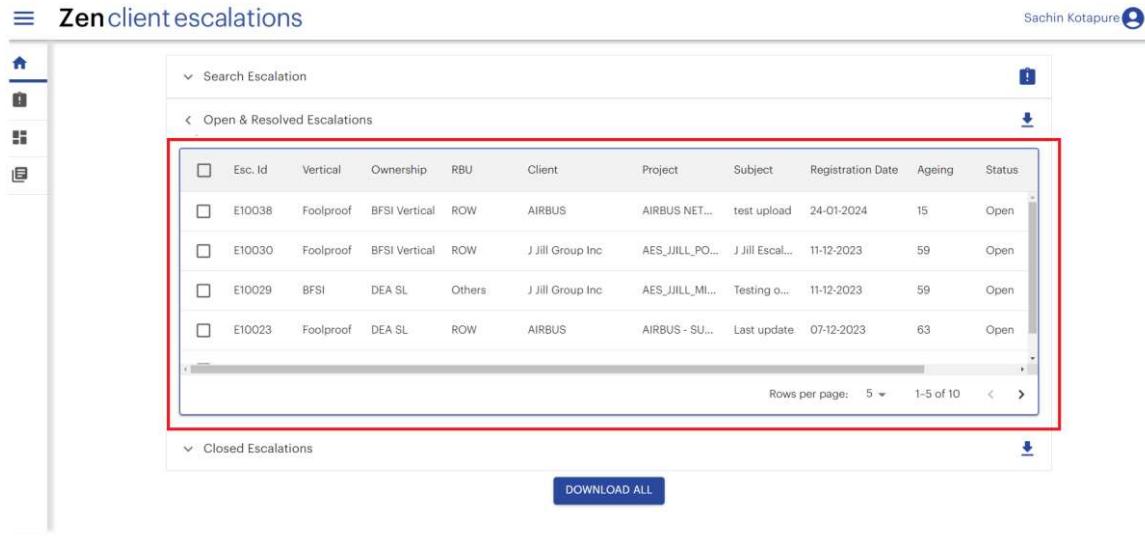
3.1.1 Search Escalations

In this Accordion, user can search for an Escalations where He/she is a stakeholder of that escalation. User can use either Vertical or Service Line or Regional Business Unit (RBU) to search for an escalation. In addition to that he can also search for any escalation by selecting any number of specific Vertical and Service Lines for different Clients of the organisation according to their Escalation status whether they are Open, Resolved or Closed as shown in figure. This accordion also consists of the register button at right hand side which can be used directly to register new escalation.

This screenshot shows the "Search Escalation" accordion from the previous screenshot. The "Vertical" dropdown is expanded, showing a list of options: "BFSI", "Foolproof", and "HTE". The "BFSI" and "Foolproof" options are checked. Other options like "Select All" and "HTE" are also visible. The rest of the interface is identical to the previous screenshot, including the table of Open & Resolved Escalations and the "DOWNLOAD ALL" button.

3.1.2 Open/Resolved Escalation

This Accordion consist of list of all the escalations that have been registered in which the user is a stakeholder of the Escalation. This Accordion consist of basic information about an Escalation such as Escalation Id, Verticals, Service Line, RBU, Client, Project, Subject, Registration Date, Ageing and Status.



The screenshot shows the 'Zenclient Escalations' interface. At the top right, there is a user profile for 'Sachin Kotapure'. Below the header, there is a search bar labeled 'Search Escalation' and a download icon. The main content area is titled 'Open & Resolved Escalations'. A red box highlights a table with the following data:

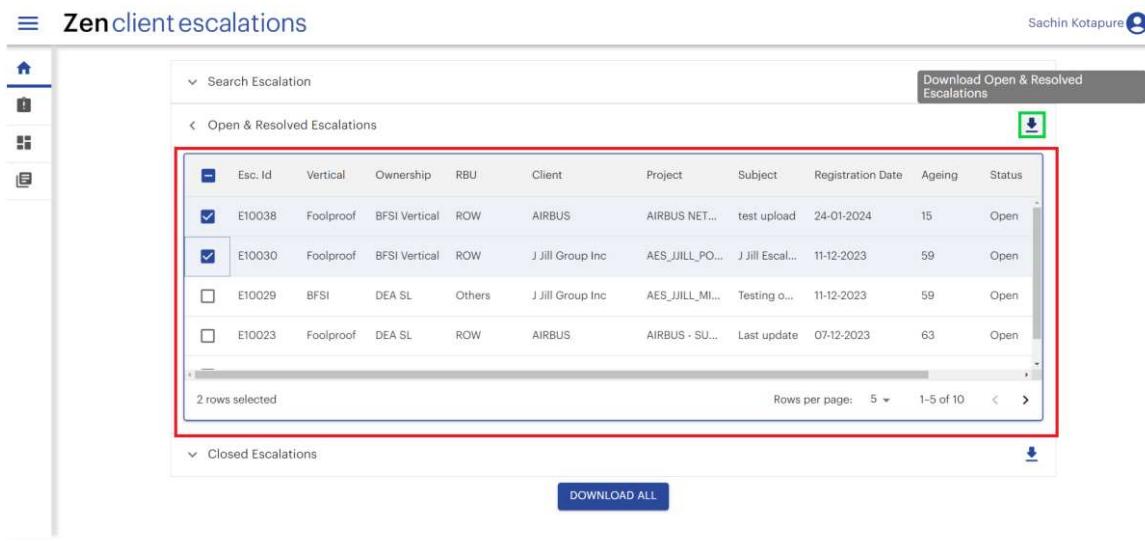
<input type="checkbox"/>	Esc. Id	Vertical	Ownership	RBU	Client	Project	Subject	Registration Date	Ageing	Status
<input type="checkbox"/>	E10038	Foolproof	BFSI Vertical	ROW	AIRBUS	AIRBUS NET...	test upload	24-01-2024	15	Open
<input type="checkbox"/>	E10030	Foolproof	BFSI Vertical	ROW	J Jill Group Inc	AES_JJILL_PO...	J Jill Escal...	11-12-2023	59	Open
<input type="checkbox"/>	E10029	BFSI	DEA SL	Others	J Jill Group Inc	AES_JJILL_Mi...	Testing o...	11-12-2023	59	Open
<input type="checkbox"/>	E10023	Foolproof	DEA SL	ROW	AIRBUS	AIRBUS - SU...	Last update	07-12-2023	63	Open

Below the table, there are buttons for 'Rows per page:' (set to 5), '1-5 of 10', and navigation arrows. At the bottom left, there is a 'Closed Escalations' section and a 'DOWNLOAD ALL' button. The bottom right corner features the Zensar logo.

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On the right-hand side we have a Download Open/Resolve Escalation button which can be used to download all or specific Open and Resolved escalations, just by selecting the check box at the end of the table and clicking the download button all the selected escalations will be downloaded in a Excell Sheet and all the fields that will be downloaded are mentioned in Annexure A.



The screenshot shows the 'Zenclient Escalations' interface. At the top right, there is a user profile for 'Sachin Kotapure'. Below the header, there is a search bar labeled 'Search Escalation' and a download icon. The main content area is titled 'Open & Resolved Escalations'. A green box highlights a button labeled 'Download Open & Resolved Escalations' above the table. A red box highlights the same table as in the previous screenshot, showing the same five rows of data. The bottom right corner features the Zensar logo.

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3.1.3 Closed Escalation

This Accordion is completely like the above accordion but instead it consists of list of all the of the Closed Escalations that have been registered in which the user is a stakeholder of the Escalation. This Accordion consist of basic information about a Closed Escalation such as Escalation Id, Verticals, Service Line, RBU, Client, Project, Subject, Registration Date, Ageing and Status.

Esc. Id	Vertical	Ownership	RBU	Client	Project	Subject	Registration Date	Ageing	Status
E10041	MCS	MCS Vertl...	Europe	JOHN LEWIS PAR...	AC_RS_JLP_O...	JLP test	05-02-2024	0	Closed
E10013	BFSI	AES SL	South Afric...	AIRBUS	AIRBUS - SU...	Additional...	20-11-2023	2	Closed
E10011	MCS	AES SL	US MCS	MACYS SYSTEMS ...	tst		17-11-2023	5	Closed
E10009	HTE	DEA SL	ROW	DISCOVERY HOL...	BANK_TEST ...	sub	01-11-2023	12	Closed

ROWS PER PAGE: 5 1-5 OF 6

DOWNLOAD ALL

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On the right-hand side we have a Download Closed Escalation button which can be used to download all or specific Closed escalations, just by selecting the check box at the end of the table and clicking the download button all the selected escalations will be downloaded in a Excel Sheet and all the fields that will be downloaded are mentioned in Annexure A.

Esc. Id	Vertical	Ownership	RBU	Client	Project	Subject	Registration Date	Ageing	Status
E10041	MCS	MCS Vertl...	Europe	JOHN LEWIS PAR...	AC_RS_JLP_O...	JLP test	05-02-2024	0	Closed
E10013	BFSI	AES SL	South Afric...	AIRBUS	AIRBUS - SU...	Additional...	20-11-2023	2	Closed
E10011	MCS	AES SL	US MCS	MACYS SYSTEMS ...	tst		17-11-2023	5	Closed
E10009	HTE	DEA SL	ROW	DISCOVERY HOL...	BANK_TEST ...	sub	01-11-2023	12	Closed

ROWS PER PAGE: 5 1-5 OF 6

DOWNLOAD ALL

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User Guide – Client Escalation Management (ZenClientEscalations)

The screenshot shows a user interface for managing client escalations. On the left, there's a sidebar with icons for home, search, and other navigation. The main area has a header 'Search Escalation' with dropdowns for 'Open & Resolved Escalations' and 'Closed Escalations'. Below is a table with columns: Esc. Id, Vertical, Service Line, RBU, Client, Project, Subject, Registration Date, Ageing, and Status. There are 22 rows selected. A red box highlights the table area. A green box highlights the 'Download Closed Escalations' button at the top right of the table. At the bottom, there's a 'DOWNLOAD ALL' button and pagination information.

3.2 Registration Page

Any user with Zensar mail credentials can use this page to register the escalation that the Client has raised. The second tab on the left navbar directs you to this page. When directed here, you can see two dropdowns one with the names of the Client and the other with the projects that Zensar has with that Client.

The screenshot shows the 'Zenclient escalations' registration page. It features a sidebar with icons for home, search, and other navigation. The main content area has a title 'Zenclient escalations' and a user profile 'Sachin Kotapure'. Below is a search bar with dropdowns for 'Client*' and 'Project', both currently showing 'Please Select Client first...'. A red box highlights the 'Client*' dropdown. At the bottom, there's a copyright notice 'Copyright ©2024 Zensar Technologies.' and a 'zensar' logo.

The pictures below show the results of the Client search and the project dropdown.

The screenshot shows the 'Zenclient escalations' page. On the left is a vertical navigation bar with icons for Home, Projects, and Lists. At the top right is a user profile for 'Sachin Kotapure'. Below the header, there are two dropdown menus: 'Client*' with 'Air' typed in, and 'Project*' with 'AIRBUS NETWORK MANAGEMENT' selected. A search icon is also present. A dropdown menu titled 'Please Select Client first...' lists various clients, including '01882 - AIRBUS', '02330 - AIRBUS', '02533 - Airbus Helicopters, Inc.', etc. The main area below the dropdowns is currently empty.

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This screenshot shows the same 'Zenclient escalations' page, but now the 'Client*' dropdown is set to 'AIRBUS'. The 'Project*' dropdown is open, showing a list of projects under 'AIRBUS NETWORK MANAGEMENT', with 'AIRBUS NETWORK SERVICES 24' highlighted. The main form area contains various input fields for an escalation record, such as Escalation Id, Escalation Owner, Quality Manager, Delivery Head, Subject, Project Ownership, VBU Head, Program Manager, Date Of Escalation, Service Line, RBU Head, Project Manager, Level Of Escalation, Vertical, Client Partner, SL Head, Escalation Raised By, Regional Business Unit, Account Manager, Project Track, Source Of Information, Escalation Description, and Registration Date (set to 30/01/2024). There is also an 'Attachments' section with an 'UPLOAD' button.

When the Client is selected, an empty form shown below pops on the screen. if there are any open projects registered in the Zen fulcrum directory for that specific Client, they will be displayed as a list in the project dropdown. The project can be selected from here for that specific escalation.

User Guide – Client Escalation Management (ZenClientEscalations)

Escalation Registration

Escalation Id	Escalation Owner*	Quality Manager* Pallavi Chaudhari(22050)	Delivery Head Satyendra Kumar
Subject*	Project Ownership*	VBU Head* Venugopal Reddy	Program Manager Shuja Uddin
Date Of Escalation*	Service Line*	RBU Head*	Project Manager Puneet Matta
Level Of Escalation*	Vertical*	Client Partner* Satyendra Kumar	SL Head
Escalation Raised By*	Regional Business Unit*	Account Manager	Project Track
Source Of Information*	Escalation Description*		
Attachments (supported format pdf, jpg, jpeg, png, doc, docx, xlsx)			
<input type="button" value="UPLOAD"/>			

Once the project is selected, click on the search icon below to prefill the data in the form available in the Zen Fulcrum directory. However, if you can't find your project in the list or there are no projects in the dropdown you can always manually fill in the details in the form for that Client.

Escalation Registration

Escalation Id	Escalation Owner*	Quality Manager* Pallavi Chaudhari(22050)	Delivery Head Satyendra Kumar
Subject*	Project Ownership*	VBU Head* Venugopal Reddy	Program Manager Shuja Uddin
Date Of Escalation*	Service Line*	RBU Head*	Project Manager Puneet Matta
Level Of Escalation*	Vertical*	Client Partner* Satyendra Kumar	SL Head
Escalation Raised By*	Regional Business Unit*	Account Manager	Project Track
Source Of Information*	Escalation Description*		
Attachments (supported format pdf, jpg, jpeg, png, doc, docx, xlsx)			
<input type="button" value="UPLOAD"/>			
<input type="button" value="SUBMIT"/> <input type="button" value="CANCEL"/>			

Now you can fill in the details of escalation in the form, The mandatory fields are marked with '*' and the rest of the fields are optional and can be filled at your convenience. In the source of information field, you should describe the person or the source from where you got to know about the escalation. The escalation description field lets you fill the detailed description of the escalation.

If there are any attachments that need to be attached related to the escalation, then you can click on the upload button and upload the required file. Once the form is filled, click on the submit button to successfully register your escalation. A pop-up with the escalation ID of your registered escalation will show up on the screen. You and everyone that you mentioned while registering the escalation will get an email confirmation once successfully registered.

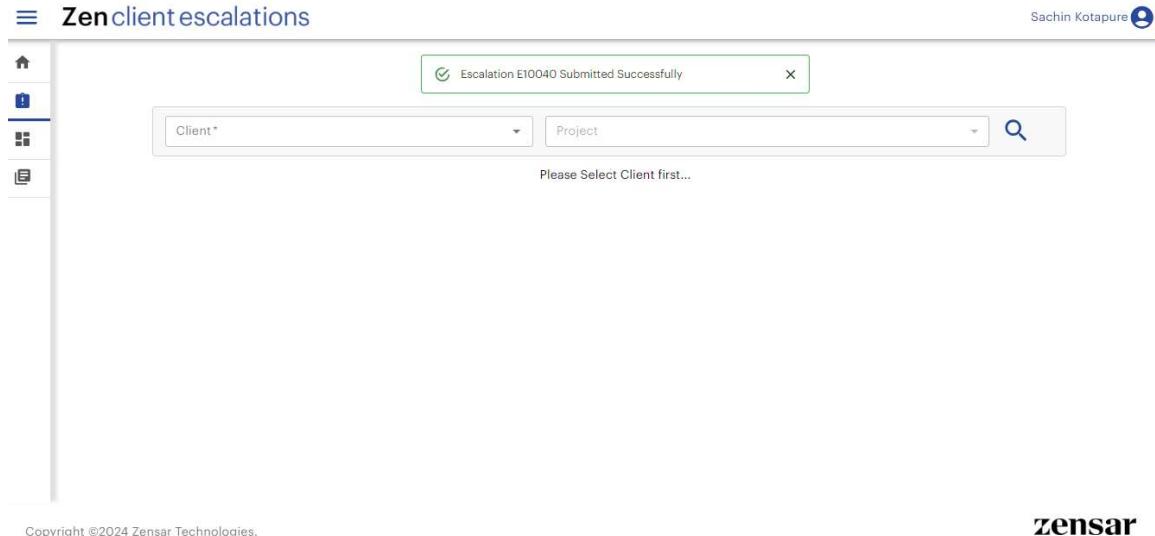
Additional Stakeholder: When additional stakeholders are added for an Escalation in the Escalation detail screen On Submit of the detail screen if there are any additional stakeholders, then it will send them alerts.

Note: Additional Stakeholder is an optional you can add whenever you required in future using escalation detail screen.

The screenshot shows the 'Escalation Registration' form. At the top, there are two dropdown menus: 'Client*' set to 'AIRBUS' and 'Project' set to 'AIRBUS NETWORK MANAGEMENT'. Below the title, there are several input fields and dropdown menus arranged in a grid:

Escalation Id	Escalation Owner *	Quality Manager * Pallavi Chaudhari(22050) VBU Head * Venugopal Reddy	Delivery Head Satyendra Kumar Program Manager Shuja Uddin Project Manager Puneet Matta
Subject*	Project Ownership*	RBU Head * Client Partner * Satyendra Kumar	SL Head Project Track Registration Date * 30/01/2024
Date Of Escalation*	Service Line*	Vertical * Regional Business Unit *	Account Manager
Level Of Escalation*			
Escalation Raised By *			
Source Of Information*	Escalation Description*		

Below these fields, there is a section for 'Attachments' with a note '(supported format pdf, jpg, jpeg, png, doc, docx, xlsx)' and a 'UPLOAD' button. To the right of the 'Escalation Description' field, there is a blue icon with a person and a plus sign, which is highlighted with a red box. At the bottom of the form are two buttons: 'SUBMIT' and 'CANCEL'.



Now you can go to the home screen where your registered escalation with the escalation ID will be displayed under the “Open and Resolved Escalations” accordion. Note that you, everyone you mentioned in the registration form, and users with admin access will have access for the further stages of this escalation. For any acronym references please refer to our acronym section at the end of this document.

3.3 Escalation Detail Page

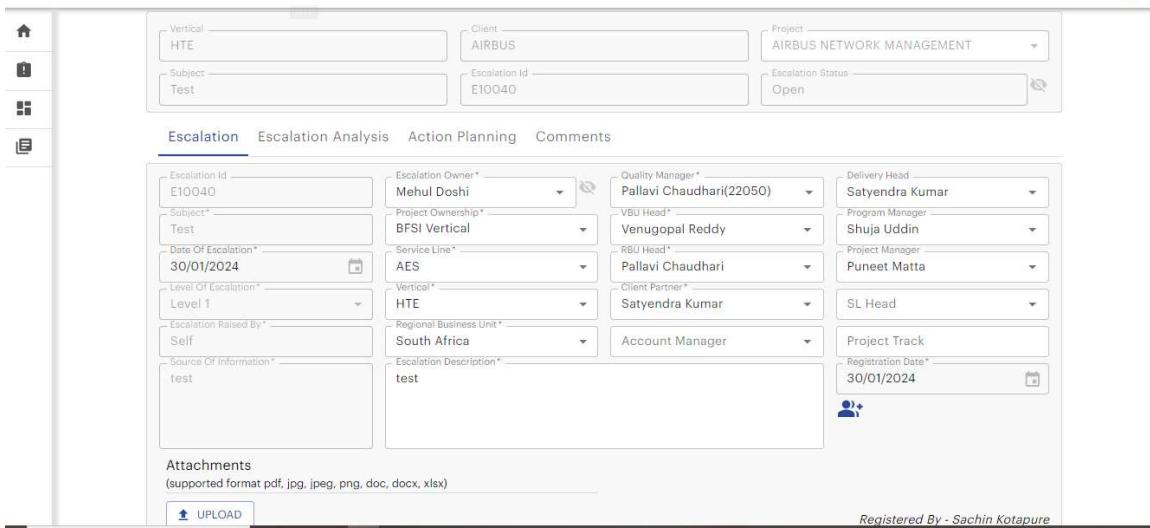
After clicking on any escalation on the home page you will be directed to this page. On the top side of the page there are six fields mentioning the basic information of the escalation. The project Name field if not mentioned during the registration will be editable otherwise it will be view only. Rest of the five fields on the top will be view only. The page displays all the available details about the escalation as well as the interactions of all the stakeholders mentioned while registering the escalation. This page aims at troubleshooting the given escalation by distributing the issue in different stages with each stage organised in the form of the tabs. The tabs mentioned on the page are Escalation, Escalation Analysis, Action Planning and Comments. All the stake holders and admin users will have the access to all these tabs.

3.3.1 Escalation Tab

This tab includes the information of the fields which were filled during the registration. Some fields like Escalation Id, Registration Date, Subject, Date of Escalation, Level of Escalation and Source of Information are view-only in this tab. For the rest of the fields all the stakeholders can give their input and edit the fields or upload the attachments at their convenience.

Zenclient escalations

Sachin Kotapure 



Escalation Details:

- Vertical: HTE
- Client: AIRBUS
- Project: AIRBUS NETWORK MANAGEMENT
- Subject: Test
- Escalation Id: E10040
- Escalation Status: Open
- Escalation Owner: Mehul Doshi
- Quality Manager: Pallavi Chaudhari (22050)
- Delivery Head: Satyendra Kumar
- VBU Head: Venugopal Reddy
- RBU Head: Pallavi Chaudhari
- Client Partner: Satyendra Kumar
- SL Head: SL Head
- Program Manager: Shuja Uddin
- Project Manager: Puneet Matta
- Regional Business Unit: AES
- Vertical: HTE
- Escalation Raised By: Self
- Source Of Information: test
- Escalation Description: test
- Attachments: (supported format pdf, jpg, jpeg, png, doc, docx, xlsx)
- Upload:

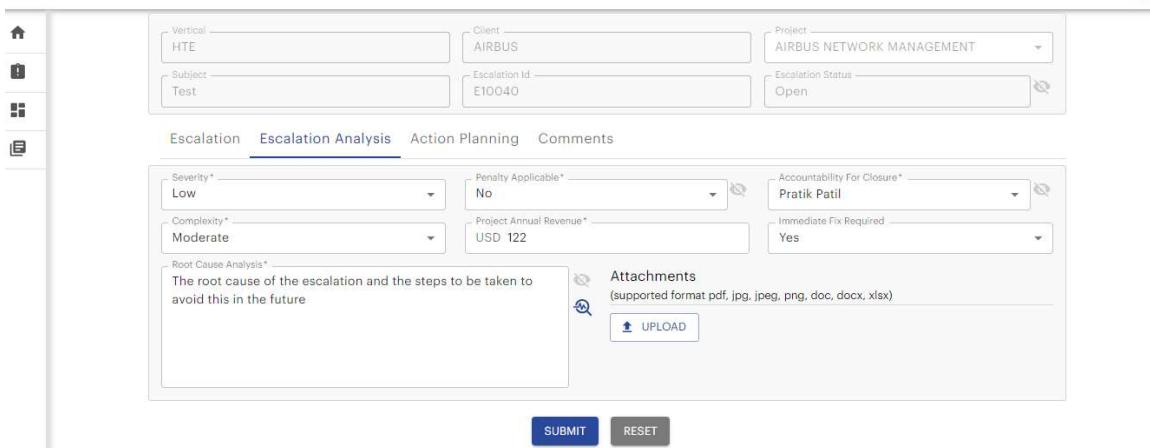
Registered By - Sachin Kotapure

3.3.2 Analysis Tab

In this section the information about the causes, severity of escalation, and other impacts the escalation has on Zensar is filled. The analysis tab though ideally filled by the escalation owner, can be filled by any of the stakeholders mentioned.

Zenclient escalations

Sachin Kotapure 



Escalation Analysis:

- Severity: Low
- Complexity: Moderate
- Penalty Applicable: No
- Project Annual Revenue: USD 122
- Accountability For Closure: Pratik Patil
- Immediate Fix Required: Yes
- Root Cause Analysis: The root cause of the escalation and the steps to be taken to avoid this in the future
- Attachments: (supported format pdf, jpg, jpeg, png, doc, docx, xlsx)
- Upload:

SUBMIT **RESET**

In the penalty applicable field, you can select if the penalty was imposed on Zensar in the escalation, the annual revenue from the project can be filled in the project annual revenue. If there is an immediate or temporary fix to the escalation issue, then you can select "Yes" from the immediate fix required dropdown, this will enable the immediate action planning grid which is available on the next tab. In the root cause analysis field, you can fill the root cause of the escalation and other information like the steps to be taken in the future. As this information is required for planning the further actions, we have put all such fields to be filled in one place.

Edit QA Analysis: Only Quality Manager and Admin has access to edit QE Analysis.

The screenshot shows the 'Escalation Analysis' tab of the ZenClientEscalations application. At the top, there are fields for 'Vertical' (Foolproof), 'Client' (AIRBUS), 'Subject' (test upload), and 'Escalation Id' (E10038). Below these are tabs for 'Escalation', 'Escalation Analysis' (which is selected), 'Action Planning', and 'Comments'. In the 'Escalation Analysis' section, there are dropdowns for 'Severity' and 'Complexity', and a field for 'Root Cause Analysis'. To the right of these is an 'Attachments' section with a file icon and a 'UPLOAD' button, both of which are highlighted with yellow boxes. At the bottom are 'SUBMIT' and 'RESET' buttons.

The screenshot shows the same interface as above, but with a modal dialog titled 'QE View Point' overlaid. The dialog contains two questions: 1) 'Could QE team have predicted this escalation?' with options 'Yes' (selected), 'No', and 'None of them'. 2) 'Was it highlighted as a risk or recommendation by QE?' with options 'Yes' and 'No'. At the bottom of the dialog are 'PREV' and 'NEXT' buttons. A message at the bottom of the main screen says 'Please save the changes'.

3.3.3 Action Planning Tab

Now once the analysis of the escalation is done, the actions need to be planned for resolving the issue. That is where action planning tab play its role. In the immediate action required field of the analysis tab, if you selected "No" then the action planning tab will have detail action planning table with one row which is mandatory to fill as shown below.

User Guide – Client Escalation Management (ZenClientEscalations)

Escalation Escalation Analysis Action Planning Comments

Immediate fix is mandatory

Sr. No.	Action*	Owner*	Expected Closure*	Actual Closure	Action Stat...	Ageing
1	Q					

Rows per page: 5 ▾ 1-1 of 1 < >

Detail Action Plan

Sr. No.	Action*	Owner*	Expected Closure*	Actual Closure	Action Stat...	Ageing
1	Q					

Rows per page: 5 ▾ 1-1 of 1 < >

Last Update Date Escalation Registration Delay Days Escalation Age Days

Attachments
(supported format pdf, jpg, jpeg, png, doc, docx, xlsx)

If you have selected “Yes” in the dropdown, then you will have an additional immediate fix table show below with one row which will also be mandatory to fill like the detail dashboard table row.

Immediate fix is mandatory

Sr. No.	Action*	Owner*	Expected Closure*	Actual Closure	Action Stat...	Ageing
1	Q					
4						

Rows per page: 5 ▾ 1-1 of 1 < >

Detail Action Plan

Sr. No.	Action*	Owner*	Expected Closure*	Actual Closure	Action Stat...	Ageing
1	Q					
4						

Rows per page: 5 ▾ 1-1 of 1 < >

Last Update Date Escalation Registration Delay Days Escalation Age Days

The immediate fix table is for making the action plan to fix the issue immediately or temporarily. The detailed action plan table is for making the action plan so that the issue is permanently fixed or is avoided in the future. As you may have noticed the row on the tables are similar, so let's have a look at the fields of the row. Each row looks like the one shown below double clicking on the field you want to fill will enable the field for giving your inputs.

User Guide – Client Escalation Management (ZenClientEscalations)

Sr. No.	Action*	Owner*	Expected Closure*	Actual Closure	Action Stat...	Ageing
1						

Rows per page: 5 ▾ 1-1 of 1 < >

The action field is for filling the actions that need to be taken for the escalation. Now for assigning the action to a person, you must select an action owner for the action. To do this you have to click on the tick icon highlighted below.

Escalation Escalation Analysis Action Planning **Comments**

Immediate fix is mandatory

Sr. No.	Action*	Owner*	Expected Closure*	Actual Closure	Action Stat...	Ageing
1						

Rows per page: 5 ▾ 1-1 of 1 < >

Detail Action Plan

Sr. No.	Action*	Owner*	Expected Closure*	Actual Closure	Action Stat...	Ageing
1						

Rows per page: 5 ▾ 1-1 of 1 < >

Last Update Date Escalation Registration Delay Days Escalation Age Days

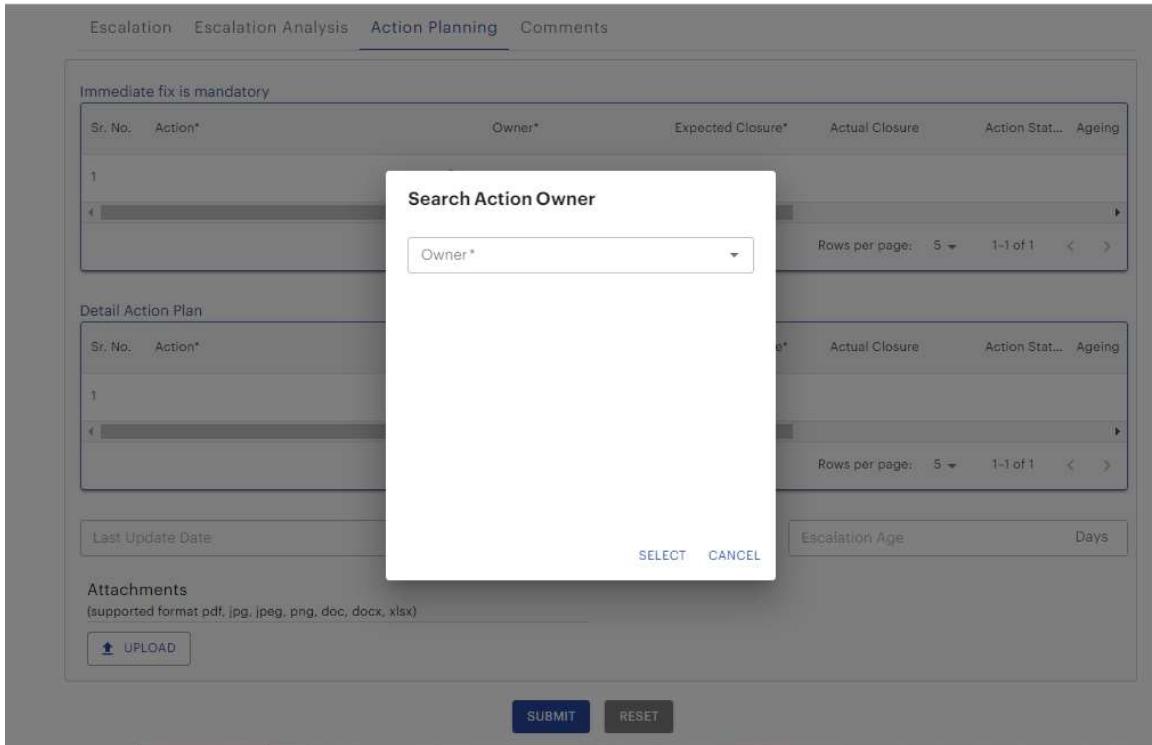
Attachments
(supported format pdf, jpg, jpeg, png, doc, docx, xlsx)

UPLOAD

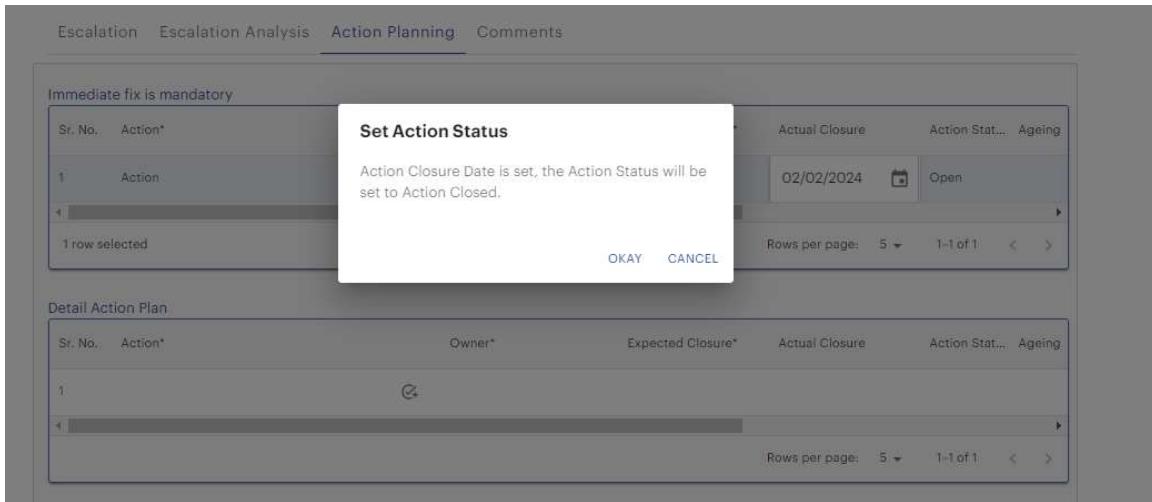
SUBMIT **RESET**

Clicking on the icon will open a popup shown below where you can type the person's name you want to assign as the action owner.

User Guide – Client Escalation Management (ZenClientEscalations)



After assigning the action owner, the expected action closure date needs to be filled. Now as you are progressing through the action you can change the status field of the action on that row accordingly. Now once the action is done, you can fill in the actual action date, a pop up shown below will appear on the screen when you are done selecting a date.



Clicking on “Okay” will set the status of the action to “closed” as the actual closure date signifies that the action is done. You can always click on cancel if the action is still ongoing. The resolution comments, though ideally filled in by the action owner, can be filled in by any of the stakeholders.

User Guide – Client Escalation Management (ZenClientEscalations)

Immediate fix is mandatory					
Sr. No.	Action*	Owner*	Expected Closure*	Actual Closure	Action Stat... Ageing
1	Action	 Sachin Kotapure	01/02/2024	02/02/2024	Closed
1 row selected					
Rows per page: 5 ▾ 1-1 of 1 < >					

Detail Action Plan					
Sr. No.	Action*	Owner*	Expected Closure*	Actual Closure	Action Stat... Ageing
1		 Sachin Kotapure	01/02/2024	02/02/2024	Closed
1 row selected					
Rows per page: 5 ▾ 1-1 of 1 < >					

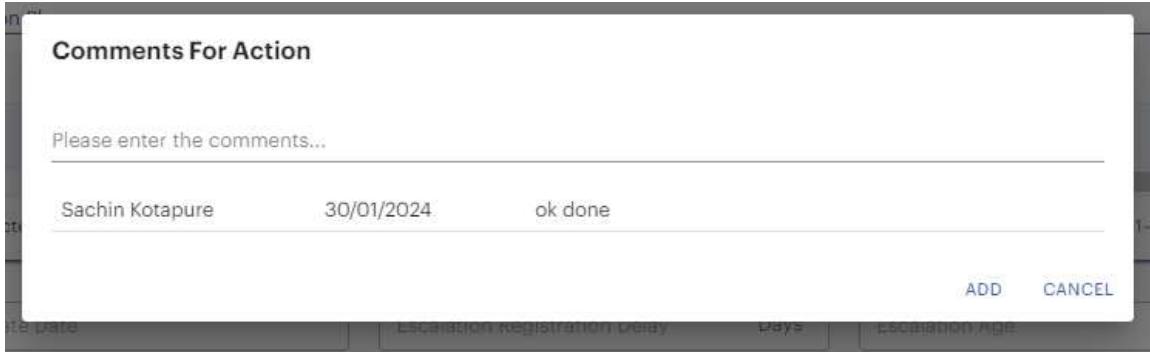
The plus icon in the end is for adding a row for planning more actions and assigning them to their respective action owners.

Detail Action Plan					
	Expected Closure*	Actual Closure	Action Stat... Ageing	Resolution Comment:	
ture	01/02/2024	02/02/2024	Closed	done	  
1 row selected					
Rows per page: 5 ▾ 1-1 of 1 < >					

The comment icon is for other stake holders for adding the intermediary comments during the action's lifecycle, the status updates and other comments can be updated here.

Detail Action Plan					
	Expected Closure*	Actual Closure	Action Stat... Ageing	Resolution Comment:	
ture	01/02/2024	02/02/2024	Closed	done	  
1 row selected					
Rows per page: 5 ▾ 1-1 of 1 < >					

After clicking on this icon, a pop up will appear where a stake holder can put his/her comments and other's comments will be visible right above the input field as shown below.



The last dustbin icon is for deleting the whole row, note that the single row cannot be deleted as filling at least one row in the action plan is mandatory.

Detail Action Plan				
Expected Closure*	Actual Closure	Action Stat...	Ageing	Resolution Comment
apure	01/02/2024	02/02/2024	Closed	done
1 row selected				

Rows per page: 5 ▾ 1-1 of 1 < >

Just below the tables there are three non-editable fields that are auto calculated. When someone makes any change to this tab, the last update date changes to the date when the changes were made in the field.

The **escalation registration delay** is calculated as: Date of Escalation Registration - Escalation Received Date

Where escalation received date is the date when the escalation was notified to Zensar, and the escalation registration date is the day when it was registered in the system.

The **escalation ageing** is calculated depending on the status of the escalation:

- | | |
|---|--|
| Escalation Closure Date - Date of Escalation Registration | - if escalation status is closed. |
| Current Date - Date of Escalation Registration | - if escalation status is Open or Resolved |

Just like the registration and analysis tab the attachments can be attached to the action plan tab if there are any. Once all the action plans are closed or canceled the overall status is set to resolved, this disables all the tabs except for the comments tab. The comments can still be added. The close escalation button is visible to the Quality Manager, Admin, and Super Admin. Once all the action owners are done with their actions, the Quality Manager, after reviewing everything, can conclude the whole process by closing the escalation. After this the escalation is moved to the closed escalation section on the home tab, this escalation including its comment section can now only be viewed.

3.3.4 Comments Tab

The comments tab is the last tab on the escalation detail page. The comments on the action planning tab are for having a discussion on the specific action, but when we want to discuss the overall escalation that is where the comments tab plays its role.

User Guide – Client Escalation Management (ZenClientEscalations)

Zenclient escalations

Sachin Kotapure

Vertical HTE	Client AIRBUS	Project AIRBUS NETWORK MANAGEMENT
Subject Test	Escalation Id E10040	Escalation Status Open

Escalation Escalation Analysis Action Planning Comments

Sr. No. Name Date Comments

1	Sachin Kotapure	30/01/2024	+
---	-----------------	------------	---

Rows per page: 100 ▾ 1-1 of 1 < >

SUBMIT **RESET**

It is just like a private comment section where all the stake holders of the escalation can update the status of the escalation and can have other discussions about the escalation. More than one comment can be added by the user by adding the row using the plus button shown below

Zenclient escalations

Sachin Kotapure

Vertical HTE	Client AIRBUS	Project AIRBUS NETWORK MANAGEMENT
Subject Test	Escalation Id E10040	Escalation Status Open

Escalation Escalation Analysis Action Planning Comments

Sr. No. Name Date Comments

1	Sachin Kotapure	30/01/2024	+
---	-----------------	------------	---

Rows per page: 100 ▾ 1-1 of 1 < >

SUBMIT **RESET**

Double clicking on the comments field of the row, we can add the text of our choice and click enter to save our input.

Zenclient escalations

Sachin Kotapure

Vertical HTE	Client AIRBUS	Project AIRBUS NETWORK MANAGEMENT
Subject Test	Escalation Id E10040	Escalation Status Open

Escalation Escalation Analysis Action Planning Comments

Sr. No. Name Date Comments ↑

1	Sachin Kotapure	30/01/2024	First comment about the escalation
2	Sachin Kotapure	30/01/2024	Second comment about the escalation
3	Sachin Kotapure	30/01/2024	Third comment about the escalation

1 row selected Rows per page: 100 ▾ 1-3 of 3 < >

SUBMIT **RESET**

Admin or Quality manager of that escalation can close the escalation once it is resolved

3.4 Summary Dashboard Page

This Page consists of the various Dashboard which can we easily switched between with a push of a radio button form vertical to Service Line, Regional Business Unit. By default, we are presented with a Vertical Summary Dashboard. One the right-hand beside Search by Radio buttons, we have a Download Summary Dashboard button which can be used to download Summary based on the Radio button selected, just by toggling the radio button between Verticals, Service lines and RBU's we can download summary dashboard directly in an Excell Sheet.

Vertical	Open		Resolved		Closed		Total
	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	
BFSI	8	27 - 62 - 84	0	0 - 0 - 0	2	2 - 5 - 8	10
Foolproof	3	6 - 37 - 54	0	0 - 0 - 0	0	0 - 0 - 0	3
HTE	6	0 - 56 - 84	0	0 - 0 - 0	1	12 - 12 - 12	7
Indigo Slate	2	6 - 45 - 84	0	0 - 0 - 0	0	0 - 0 - 0	2
MCS	3	54 - 62 - 78	1	4 - 4 - 4	2	5 - 16 - 27	6
Org. Level	22	0 - 55 - 84	1	4 - 4 - 4	5	2 - 10 - 27	28

Overall Organization Average Ageing : 46

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3.4.1 Search By Verticals

In Vertical Summary Dashboard all the verticals such as BFSI, HTE, MCS are listed on left hand side along with the count and total count of the Open, Resolved and Closed escalation along with their Minimum, Average & Maximum Ageing. The calculation for Ageing is mentioned in Annexure 2.

Vertical	Open		Resolved		Closed		Total
	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	
BFSI	8	27 - 62 - 84	0	0 - 0 - 0	2	2 - 5 - 8	10
Foolproof	3	6 - 37 - 54	0	0 - 0 - 0	0	0 - 0 - 0	3
HTE	6	0 - 56 - 84	0	0 - 0 - 0	1	12 - 12 - 12	7
Indigo Slate	2	6 - 45 - 84	0	0 - 0 - 0	0	0 - 0 - 0	2
MCS	3	54 - 62 - 78	1	4 - 4 - 4	2	5 - 16 - 27	6
Org. Level	22	0 - 55 - 84	1	4 - 4 - 4	5	2 - 10 - 27	28

Overall Organization Average Ageing : 46

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As shown in above figure, these rows under Verticals are hyperlink to Dashboard Detail Summary Page which shows details of the of Open, Resolved and Closed Escalations for that specific vertical along with other different fields.

Zenclient escalations

Sachin Kotapure

Search By Vertical Service Line Regional Business Unit Project Ownership

All	Open			Resolved		Closed		Total
Vertical	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	Total	
BFSI	8	27 - 62 - 84	0	0 - 0 - 0	2	2 - 5 - 8	10	
Foolproof	3	6 - 37 - 54	0	0 - 0 - 0	0	0 - 0 - 0	3	
HTE	6	0 - 56 - 84	0	0 - 0 - 0	1	12 - 12 - 12	7	
Indigo Slate	2	6 - 45 - 84	0	0 - 0 - 0	0	0 - 0 - 0	2	
MCS	3	54 - 62 - 78	1	4 - 4 - 4	2	5 - 16 - 27	6	
Org. Level	22	0 - 55 - 84	1	4 - 4 - 4	5	2 - 10 - 27	28	

Overall Organization Average Ageing : 46

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Zenclient escalations

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Escalation Details (Vertical wise)

Open Escalations							
Vertical	Client Name	AES, DEA	AES	DEA, EXP	DEA	EXP, FS	EXP
BFSI		1	2	1	1	1	1
	DISCOVERY HOLDINGS	1	0	0	0	1	1
	CISCO	0	1	0	0	0	0
	Discovery Invest	0	0	0	1	0	0
	INVESTEC BANK	0	1	0	0	0	0
	J Jill Group Inc	0	0	1	0	0	0
	AIRBUS	0	0	0	0	0	1
	Grand Total	1	2	1	1	1	1

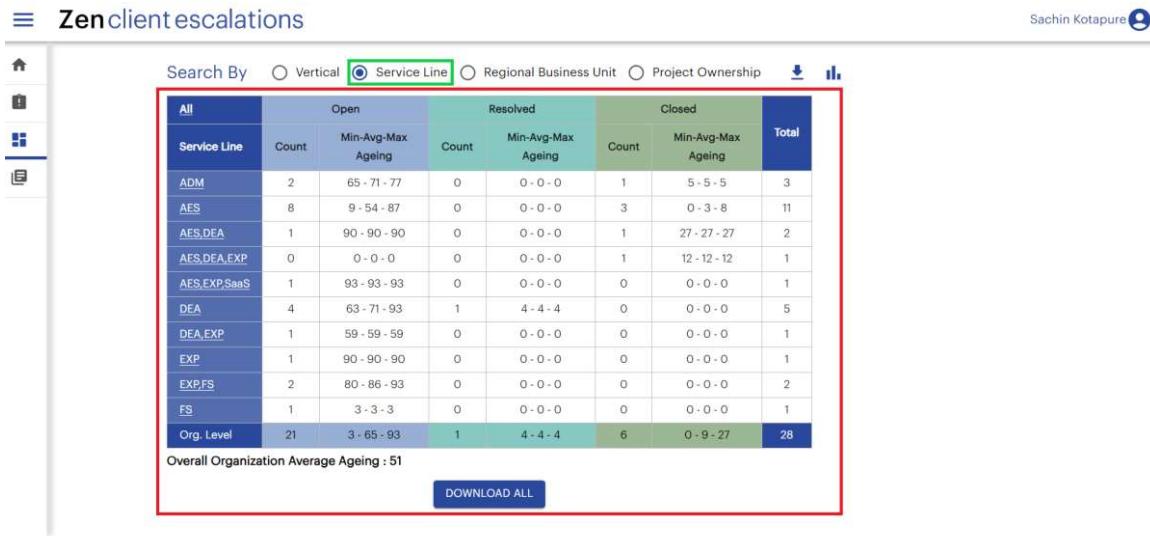
Closed Escalations

Vertical	Client Name	AES	Grand Total	Min - Avg - Max Ageing
BFSI		2	2	2 - 5 - 8
	FISERV, INC.	1	1	8 - 8 - 8
	AIRBUS	1	1	2 - 2 - 2
	Grand Total	2	2	

In the similar manner, The Detail Dashboard for other Verticals Like FISERV, INC. and AIRBUS also can be viewed just, by clicking on the hyperlinks of the other Verticals and Detail Summary dashboard for the specific Vertical can also be downloaded directly into Excel sheet just by clicking the Download button on extreme right side, this button will download the complete Detail Summary dashboard for that Vertical.

3.4.2 Search By Service Line

In Search by, switching the radio button to Service Line gives Summary Dashboard in which all the Service Lines such as ADM, AES, DEA, EXP, FS, SaaS are listed on left hand side along with the count and total count of the Open, Resolved and Closed escalation along with their Minimum, Average & Maximum Ageing. The calculation for Ageing is mentioned in Annexure 2.



The screenshot shows a summary dashboard for client escalations. At the top, there is a search bar with options: Vertical (radio button), Service Line (radio button, selected), Regional Business Unit, and Project Ownership. Below the search bar is a table with the following columns:

Service Line	Open		Resolved		Closed		Total
	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	
All	21	3 - 65 - 93	1	4 - 4 - 4	6	0 - 9 - 27	28
ADM	2	65 - 71 - 77	0	0 - 0 - 0	1	5 - 5 - 5	3
AES	8	9 - 54 - 87	0	0 - 0 - 0	3	0 - 3 - 8	11
AES,DEA	1	90 - 90 - 90	0	0 - 0 - 0	1	27 - 27 - 27	2
AES,DEA,EXP	0	0 - 0 - 0	0	0 - 0 - 0	1	12 - 12 - 12	1
AES,EXP,SaaS	1	93 - 93 - 93	0	0 - 0 - 0	0	0 - 0 - 0	1
DEA	4	63 - 71 - 93	1	4 - 4 - 4	0	0 - 0 - 0	5
DEA,EXP	1	59 - 59 - 59	0	0 - 0 - 0	0	0 - 0 - 0	1
EXP	1	90 - 90 - 90	0	0 - 0 - 0	0	0 - 0 - 0	1
EXP,FS	2	80 - 86 - 93	0	0 - 0 - 0	0	0 - 0 - 0	2
FS	1	3 - 3 - 3	0	0 - 0 - 0	0	0 - 0 - 0	1
Org. Level	21	3 - 65 - 93	1	4 - 4 - 4	6	0 - 9 - 27	28

Overall Organization Average Ageing : 51

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As shown in the above figure, these rows under Service Line are hyperlink to Dashboard Detail Summary Page which shows details of the of Open, Resolved and Closed Escalations for that specific Service Line.



The screenshot shows the same summary dashboard as the previous one, but with a red box highlighting the row for 'AES,DEA'. This row is a hyperlink, as indicated by the underline in the original image. The rest of the table and controls are identical to the first screenshot.

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Zenclient escalations

Sachin Kotapure 

Escalation Details (Service Line wise)



Service Line	Client	BFSI	FOOLPRO...	HTE	INDIGO SL...	MCS	Min - Avg - Max Age...	BFSI	FOOLPRO
AES,DEA	DISCOVERY HOLDINGS	1	0	0	0	0	90 - 90 - 90	0	0
AES,DEA	AIRBUS	0	0	0	0	0	0 - 0 - 0	0	0
Grand Total		1	0	0	0	0		0	0

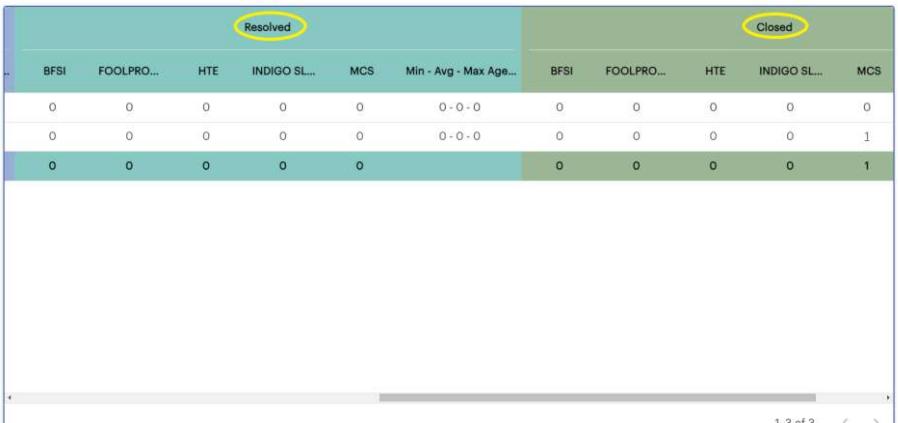
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Escalation Details (Service Line wise)



Resolved						Closed				
BFSI	FOOLPRO...	HTE	INDIGO SL...	MCS	Min - Avg - Max Age...	BFSI	FOOLPRO...	HTE	INDIGO SL...	MCS
0	0	0	0	0	0 - 0 - 0	0	0	0	0	0
0	0	0	0	0	0 - 0 - 0	0	0	0	0	1
0	0	0	0	0		0	0	0	0	1

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In the similar manner, The Detail Dashboard for other Service Lines Like ADM, AES, DEA, EXP, FS, SaaS can also be viewed just, by clicking on the hyperlinks of the other Service Lines and Detail Summary dashboard for the specific Service Lines can also be downloaded directly into Excel sheet just by clicking the Download button on extreme right side, this button will download the complete Detail Summary dashboard for that Service Lines.

3.4.3 Search By Regional Business Unit

In Search by, switching the radio button to RBU gives Summary Dashboard in which all the RBU's such as Europe, ROW, South Africa, US BFSI, US HTE, US MCS and Others are listed on left hand side along with the count and total count of the Open, Resolved and Closed escalation along with their Minimum, Average & Maximum. The calculation for Ageing is mentioned in Annexure 2.

Zenclient escalations

Sachin Kotapure 


The screenshot shows a dashboard titled "Zenclient escalations". At the top, there is a search bar with options: "Search By" (radio buttons for "Vertical", "Service Line", "Regional Business Unit" (which is selected and highlighted with a red box), and "Project Ownership"), and download/export icons. Below the search bar is a table with the following columns:

All	Open		Resolved		Closed		Total
	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	
Europe	1	72 - 72 - 72	0	0 - 0 - 0	1	0 - 0 - 0	2
Others	1	59 - 59 - 59	0	0 - 0 - 0	0	0 - 0 - 0	1
ROW	3	15 - 46 - 63	0	0 - 0 - 0	1	12 - 12 - 12	4
South Africa	8	9 - 67 - 93	0	0 - 0 - 0	3	2 - 12 - 27	11
US BFSI	2	64 - 77 - 90	0	0 - 0 - 0	0	0 - 0 - 0	2
US HTE	5	3 - 64 - 93	0	0 - 0 - 0	0	0 - 0 - 0	5
US MCS	1	87 - 87 - 87	1	4 - 4 - 4	1	5 - 5 - 5	3
Org. Level	21	3 - 65 - 93	1	4 - 4 - 4	6	0 - 9 - 27	28

Overall Organization Average Ageing : 51

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As shown in the above figure, these rows under RBU are hyperlink to Dashboard Detail Summary Page which shows details of the Open, Resolved and Closed Escalations for that specific that RBU.

Zenclient escalations

Sachin Kotapure 


The screenshot shows a dashboard titled "Zenclient escalations". At the top, there is a search bar with options: "Search By" (radio buttons for "Vertical", "Service Line", "Regional Business Unit" (which is selected and highlighted with a red box), and "Project Ownership"), and download/export icons. Below the search bar is a table with the following columns:

All	Open		Resolved		Closed		Total
	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	
Europe	1	72 - 72 - 72	0	0 - 0 - 0	1	0 - 0 - 0	2
Others	1	59 - 59 - 59	0	0 - 0 - 0	0	0 - 0 - 0	1
ROW	3	15 - 46 - 63	0	0 - 0 - 0	1	12 - 12 - 12	4
South Africa	8	9 - 67 - 93	0	0 - 0 - 0	3	2 - 12 - 27	11
US BFSI	2	64 - 77 - 90	0	0 - 0 - 0	0	0 - 0 - 0	2
US HTE	5	3 - 64 - 93	0	0 - 0 - 0	0	0 - 0 - 0	5
US MCS	1	87 - 87 - 87	1	4 - 4 - 4	1	5 - 5 - 5	3
Org. Level	21	3 - 65 - 93	1	4 - 4 - 4	6	0 - 9 - 27	28

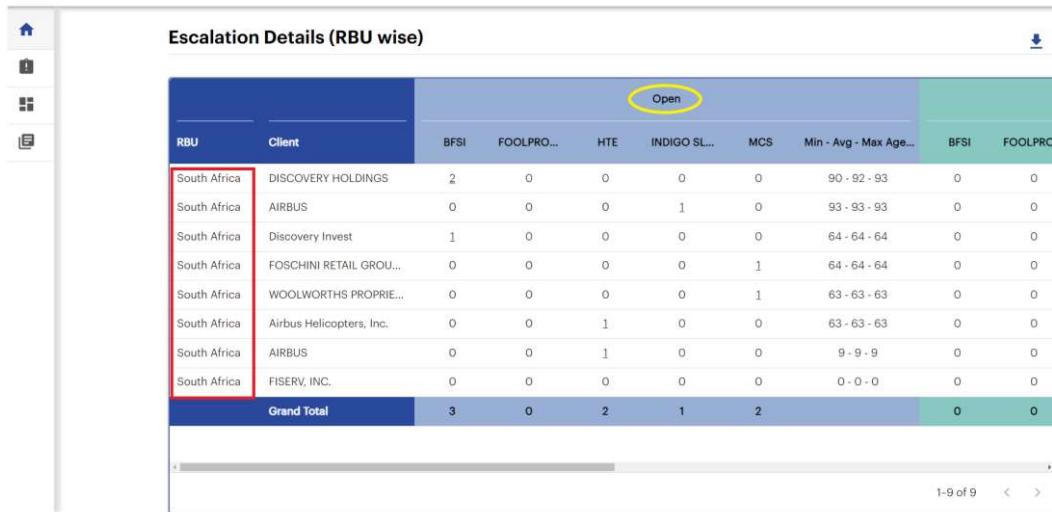
Overall Organization Average Ageing : 51

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Zenclient escalations

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Escalation Details (RBU wise)

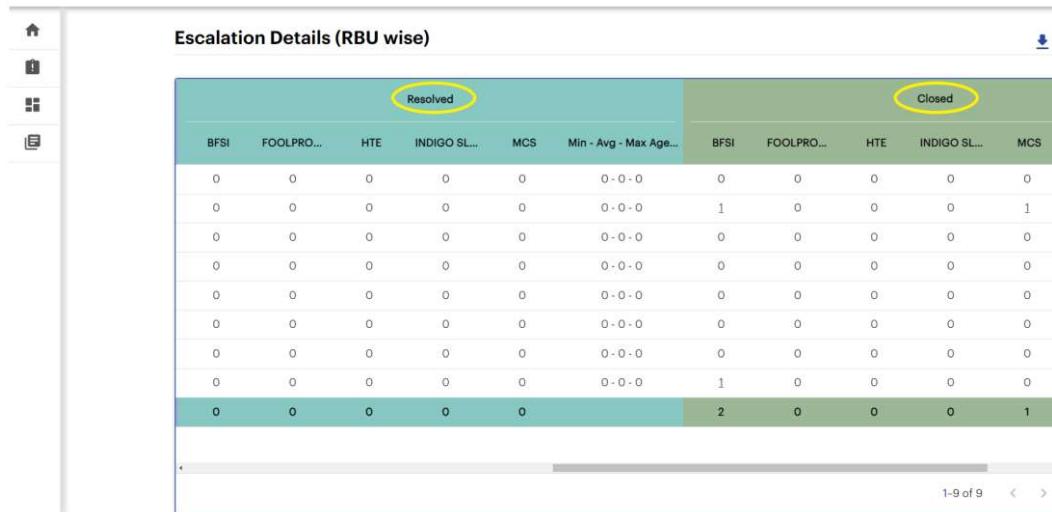
RBU	Client	BFSI	FOOLPRO...	HTE	INDIGO SL...	MCS	Min - Avg - Max Age...	BFSI	FOOLPRO
South Africa	DISCOVERY HOLDINGS	2	0	0	0	0	90 - 92 - 93	0	0
South Africa	AIRBUS	0	0	0	1	0	93 - 93 - 93	0	0
South Africa	Discovery Invest	1	0	0	0	0	64 - 64 - 64	0	0
South Africa	FOSCHINI RETAIL GROU...	0	0	0	0	1	64 - 64 - 64	0	0
South Africa	WOOLWORTHS PROPRIE...	0	0	0	0	1	63 - 63 - 63	0	0
South Africa	Airbus Helicopters, Inc.	0	0	1	0	0	63 - 63 - 63	0	0
South Africa	AIRBUS	0	0	1	0	0	9 - 9 - 9	0	0
South Africa	FISERV, INC.	0	0	0	0	0	0 - 0 - 0	0	0
Grand Total		3	0	2	1	2		0	0

1-9 of 9 < >

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Zenclient escalations

Sachin Kotapure 


Escalation Details (RBU wise)

Resolved						Closed				
BFSI	FOOLPRO...	HTE	INDIGO SL...	MCS	Min - Avg - Max Age...	BFSI	FOOLPRO...	HTE	INDIGO SL...	MCS
0	0	0	0	0	0 - 0 - 0	0	0	0	0	0
0	0	0	0	0	0 - 0 - 0	1	0	0	0	1
0	0	0	0	0	0 - 0 - 0	0	0	0	0	0
0	0	0	0	0	0 - 0 - 0	0	0	0	0	0
0	0	0	0	0	0 - 0 - 0	0	0	0	0	0
0	0	0	0	0	0 - 0 - 0	0	0	0	0	0
0	0	0	0	0	0 - 0 - 0	0	0	0	0	0
0	0	0	0	0	0 - 0 - 0	1	0	0	0	0
0	0	0	0	0	0 - 0 - 0	2	0	0	0	1

1-9 of 9 < >

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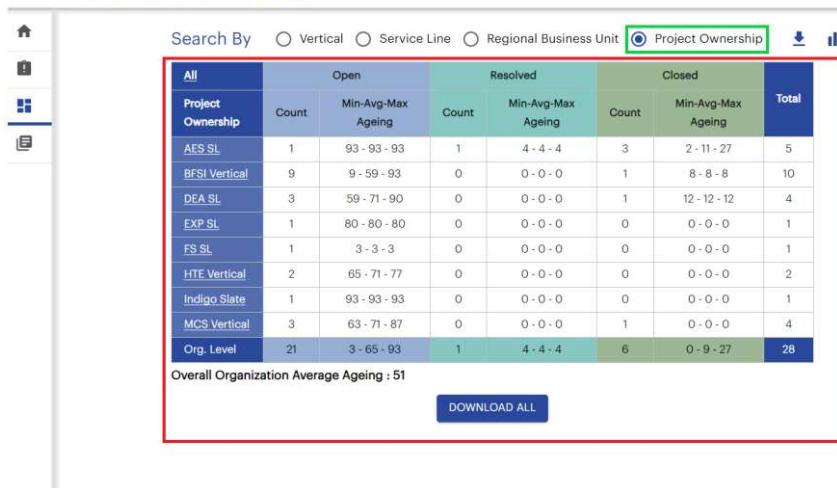
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In the similar manner, The Detail Dashboard for other RBU's Like Europe, ROW, South Africa, US BFSI, US HTE, US MCS and Others can also can be viewed just, by clicking on the hyperlinks of the other RBU's and Detail Summary dashboard for the specific RBU's can also be downloaded directly into Excell sheet just by clicking the Download button on extreme right side, this button will download the complete Detail Summary dashboard for that RBU.

3.4.4 Search By Project Ownership

In Search by, switching the radio button to Project Ownership gives Summary Dashboard in which all the Project Ownership's such as AES SL, BFSI Vertical, DEA SL, EXP SL, FS SL, HTE Vertical and Others are listed on left hand side along with the count and total count of the Open, Resolved and Closed escalation along with their Minimum, Average & Maximum.

Zenclient escalations



Search By Vertical Service Line Regional Business Unit Project Ownership  

All	Open		Resolved		Closed		Total
Project Ownership	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	
AES SL	1	93 - 93 - 93	1	4 - 4 - 4	3	2 - 11 - 27	5
BFSI Vertical	9	9 - 59 - 93	0	0 - 0 - 0	1	8 - 8 - 8	10
DEA SL	3	59 - 71 - 90	0	0 - 0 - 0	1	12 - 12 - 12	4
EXP SL	1	80 - 80 - 80	0	0 - 0 - 0	0	0 - 0 - 0	1
FS SL	1	3 - 3 - 3	0	0 - 0 - 0	0	0 - 0 - 0	1
HTE Vertical	2	65 - 71 - 77	0	0 - 0 - 0	0	0 - 0 - 0	2
Indigo Slate	1	93 - 93 - 93	0	0 - 0 - 0	0	0 - 0 - 0	1
MCS Vertical	3	63 - 71 - 87	0	0 - 0 - 0	1	0 - 0 - 0	4
Org. Level	21	3 - 65 - 93	1	4 - 4 - 4	6	0 - 9 - 27	28

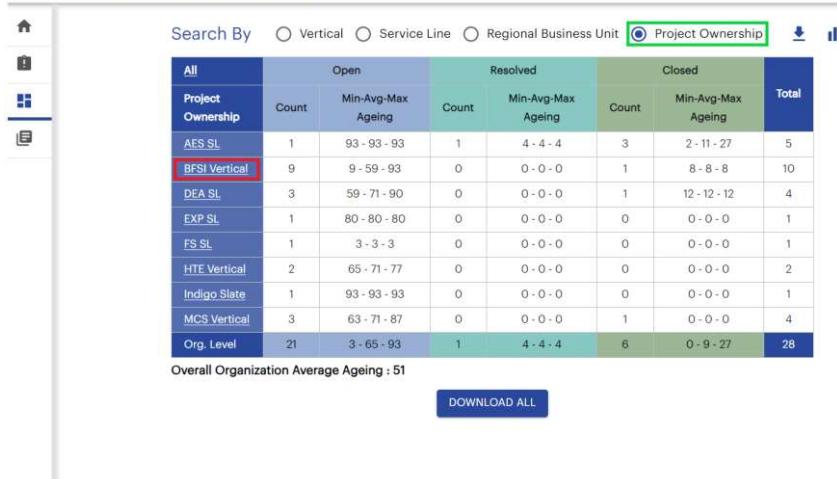
Overall Organization Average Ageing : 51 

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In the similar manner, The Detail Dashboard for other Project Ownership's Like AES SL, BFSI Vertical, DEA SL, EXP SL, FS SL, HTE Vertical and Others can also can be viewed just, by clicking on the hyperlinks of the other Project Ownership's and Detail Summary dashboard for the specific Project Ownership's can also be downloaded directly into Excell sheet just by clicking the Download button on extreme right side, this button will download the complete Detail Summary dashboard for that Project Ownership.

Zenclient escalations



Search By Vertical Service Line Regional Business Unit Project Ownership  

All	Open		Resolved		Closed		Total
Project Ownership	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	
AES SL	1	93 - 93 - 93	1	4 - 4 - 4	3	2 - 11 - 27	5
BFSI Vertical	9	9 - 59 - 93	0	0 - 0 - 0	1	8 - 8 - 8	10
DEA SL	3	59 - 71 - 90	0	0 - 0 - 0	1	12 - 12 - 12	4
EXP SL	1	80 - 80 - 80	0	0 - 0 - 0	0	0 - 0 - 0	1
FS SL	1	3 - 3 - 3	0	0 - 0 - 0	0	0 - 0 - 0	1
HTE Vertical	2	65 - 71 - 77	0	0 - 0 - 0	0	0 - 0 - 0	2
Indigo Slate	1	93 - 93 - 93	0	0 - 0 - 0	0	0 - 0 - 0	1
MCS Vertical	3	63 - 71 - 87	0	0 - 0 - 0	1	0 - 0 - 0	4
Org. Level	21	3 - 65 - 93	1	4 - 4 - 4	6	0 - 9 - 27	28

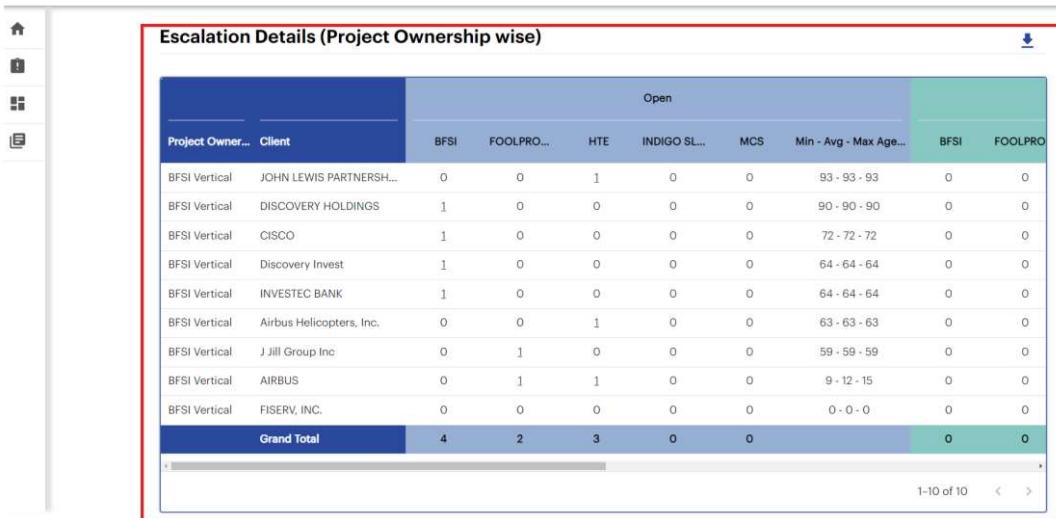
Overall Organization Average Ageing : 51 

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Zenclient escalations

Sachin Kotapure 



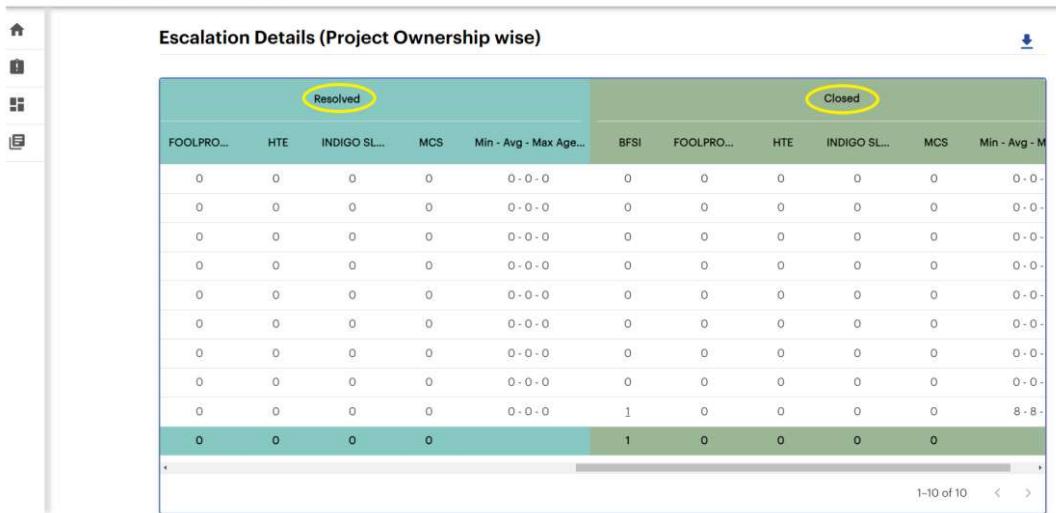
Project Owner... Client		Open							
BFSI Vertical	JOHN LEWIS PARTNERSH...	0	0	1	0	0	93 - 93 - 93	0	0
BFSI Vertical	DISCOVERY HOLDINGS	1	0	0	0	0	90 - 90 - 90	0	0
BFSI Vertical	CISCO	1	0	0	0	0	72 - 72 - 72	0	0
BFSI Vertical	Discovery Invest	1	0	0	0	0	64 - 64 - 64	0	0
BFSI Vertical	INVESTEC BANK	1	0	0	0	0	64 - 64 - 64	0	0
BFSI Vertical	Airbus Helicopters, Inc.	0	0	1	0	0	63 - 63 - 63	0	0
BFSI Vertical	J Jill Group Inc	0	1	0	0	0	59 - 59 - 59	0	0
BFSI Vertical	AIRBUS	0	1	1	0	0	9 - 12 - 15	0	0
BFSI Vertical	FISERV, INC.	0	0	0	0	0	0 - 0 - 0	0	0
Grand Total		4	2	3	0	0		0	0

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Resolved					Closed					
FOOLPRO...	HTE	INDIGO SL...	MCS	Min - Avg - Max Age...	BFSI	FOOLPRO...	HTE	INDIGO SL...	MCS	Min - Avg - M
0	0	0	0	0 - 0 - 0	0	0	0	0	0	0 - 0 - 0
0	0	0	0	0 - 0 - 0	0	0	0	0	0	0 - 0 - 0
0	0	0	0	0 - 0 - 0	0	0	0	0	0	0 - 0 - 0
0	0	0	0	0 - 0 - 0	0	0	0	0	0	0 - 0 - 0
0	0	0	0	0 - 0 - 0	0	0	0	0	0	0 - 0 - 0
0	0	0	0	0 - 0 - 0	0	0	0	0	0	0 - 0 - 0
0	0	0	0	0 - 0 - 0	0	0	0	0	0	0 - 0 - 0
0	0	0	0	0 - 0 - 0	0	0	0	0	0	0 - 0 - 0
0	0	0	0	0 - 0 - 0	1	0	0	0	0	8 - 8 - 8
0	0	0	0		1	0	0	0	0	

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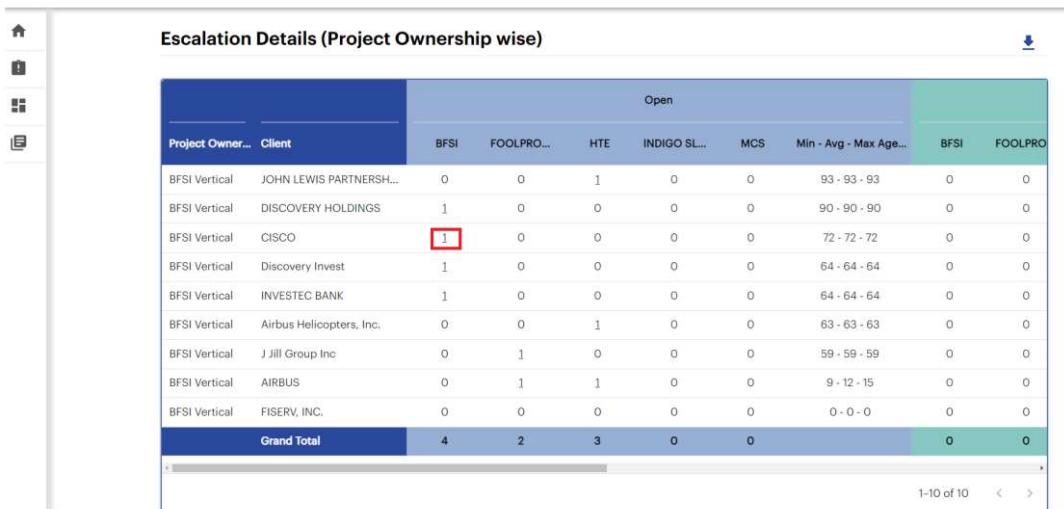
As shown in the below figure, these rows under Project Ownership are hyperlinked to Dashboard Detail Summary Page which shows details of the of Open, Resolved and Closed Escalations for that specific that Project Ownership.

User Guide – Client Escalation Management (ZenClientEscalations)

Zenclient escalations

Sachin Kotapure 

Escalation Details (Project Ownership wise)



The table displays the following data:

Project Owner...	Client	Open						BFSI	FOOLPRO
		BFSI	FOOLPRO...	HTE	INDIGO SL...	MCS	Min - Avg - Max Age...		
BFSI Vertical	JOHN LEWIS PARTNERSH...	0	0	1	0	0	93 - 93 - 93	0	0
BFSI Vertical	DISCOVERY HOLDINGS	1	0	0	0	0	90 - 90 - 90	0	0
BFSI Vertical	CISCO	1	0	0	0	0	72 - 72 - 72	0	0
BFSI Vertical	Discovery Invest	1	0	0	0	0	64 - 64 - 64	0	0
BFSI Vertical	INVESTEC BANK	1	0	0	0	0	64 - 64 - 64	0	0
BFSI Vertical	Airbus Helicopters, Inc.	0	0	1	0	0	63 - 63 - 63	0	0
BFSI Vertical	J Jill Group Inc	0	1	0	0	0	59 - 59 - 59	0	0
BFSI Vertical	AIRBUS	0	1	1	0	0	9 - 12 - 15	0	0
BFSI Vertical	FISERV, INC.	0	0	0	0	0	0 - 0 - 0	0	0
Grand Total		4	2	3	0	0		0	0

1-10 of 10 < >

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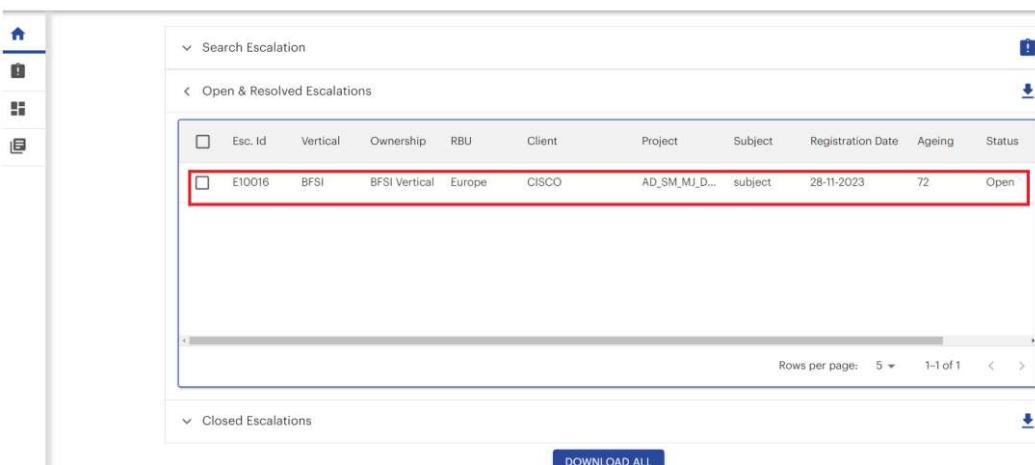
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Zenclient escalations

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Search Escalation

< Open & Resolved Escalations



The table displays the following data:

<input type="checkbox"/>	Esc. Id	Vertical	Ownership	RBU	Client	Project	Subject	Registration Date	Ageing	Status
<input checked="" type="checkbox"/>	E10016	BFSI	BFSI Vertical	Europe	CISCO	AD_SM_MU_D...	subject	28-11-2023	72	Open

Rows per page: 5 1-1 of 1 < >

Closed Escalations

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3.4.5 View Trends

By using the "View Trends" option we can get the graph chart of total open escalations, newly registered and closed escalations. It is useful for comparing different categories like total open escalations, newly registered and closed escalations. Each bar represents a category, and the length of the bar corresponds to the value of the category.

Step 1: As shown in the figure below click on icon to view the graph chart.

Zenclient escalations

Sachin Kotapure 

Search By Vertical Service Line Regional Business Unit Project Ownership  

All	Open		Resolved		Closed		Total
Vertical	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	Count	Min-Avg-Max Ageing	
BFSI	7	59 - 76 - 93	0	0 - 0 - 0	2	2 - 5 - 8	9
Foolproof	3	15 - 46 - 63	0	0 - 0 - 0	0	0 - 0 - 0	3
HTF	7	3 - 56 - 93	0	0 - 0 - 0	1	12 - 12 - 12	8
Indigo Slate	1	93 - 93 - 93	0	0 - 0 - 0	0	0 - 0 - 0	1
MCS	3	63 - 71 - 87	1	4 - 4 - 4	3	0 - 11 - 27	7
Org. Level	21	3 - 65 - 93	1	4 - 4 - 4	6	0 - 9 - 27	28

Overall Organization Average Ageing : 51

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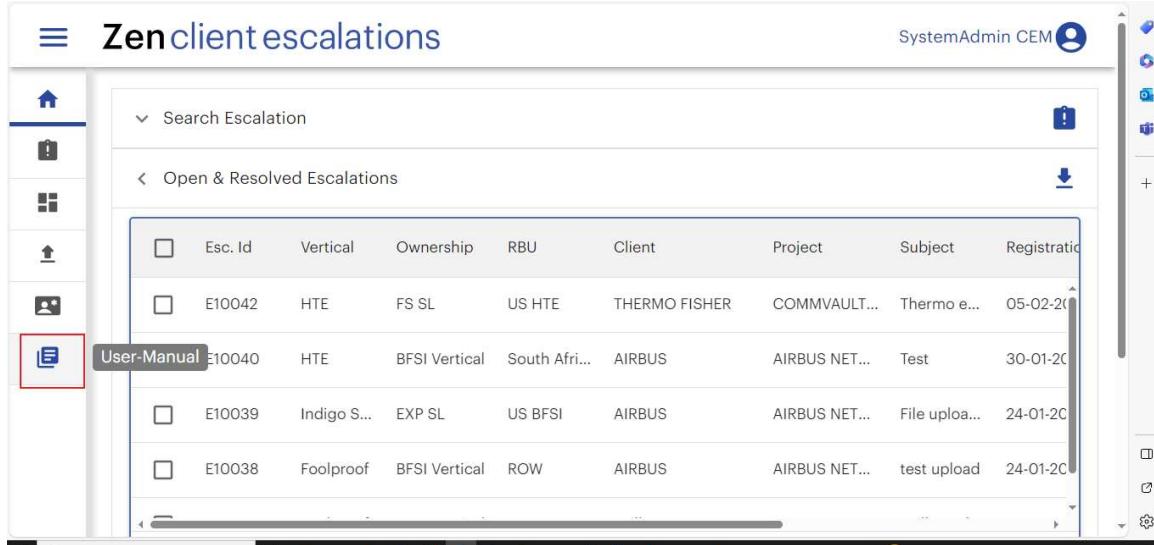
Step 2: As shown in the below figure It will view the graph chart of all escalations. Total open escalations are represented in blue color, newly registered escalations are represented in black color and closed escalations in month are represented in the red color.



3.5 User Manual

An application user manual is a comprehensive resource that provides all information about a software product and how to use it. It includes details about setting up the application using its features and functionalities.

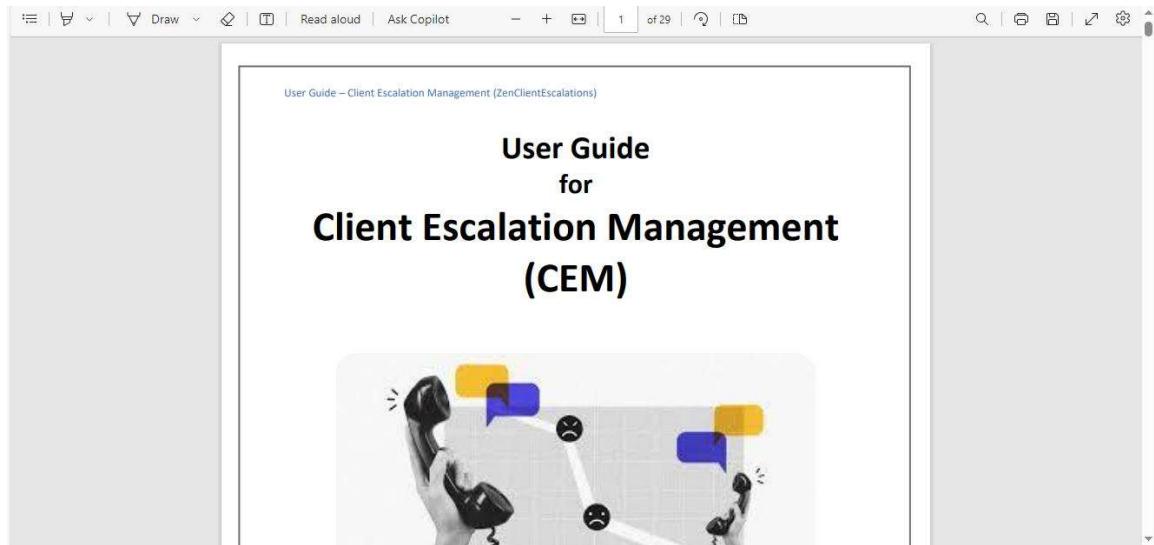
Step 1: As shown in the figure below Click on the icon to download the user manual in pdf format.



The screenshot shows the Zenclient escalations application. On the left is a vertical toolbar with icons for Home, Escalations, Projects, and a search bar. The main area has a header 'Search Escalation' and a sub-header 'Open & Resolved Escalations'. Below is a table with columns: Esc. Id, Vertical, Ownership, RBU, Client, Project, Subject, and Registration Date. The first row, which has a 'User-Manual' link next to it, is highlighted with a red box. The registration date for this row is '05-02-2020'.

Esc. Id	Vertical	Ownership	RBU	Client	Project	Subject	Registration Date
E10042	HTE	FS SL	US HTE	THERMO FISHER	COMMVAULT...	Thermo e...	05-02-2020
User-Manual E10040	HTE	BFSI Vertical	South Afr...	AIRBUS	AIRBUS NET...	Test	30-01-2020
E10039	Indigo S...	EXP SL	US BFSI	AIRBUS	AIRBUS NET...	File uploa...	24-01-2020
E10038	Foolproof	BFSI Vertical	ROW	AIRBUS	AIRBUS NET...	test upload	24-01-2020

Step 2: Once it is downloaded. It will be open in browser.



The screenshot shows a Microsoft Word document window. The title bar says 'User Guide – Client Escalation Management (ZenClientEscalations)'. The main content is a title page with the text 'User Guide for Client Escalation Management (CEM)' and a graphic of two stylized figures with speech bubbles.

4. Super Admin Panel

4.1 Upload Escalations

This page is accessible by pressing the upload icon on the side navbar. The upload page is accessible only to the super admin. Here an Excel sheet with a specific format is uploaded which will complete the whole process right from registration to action planning of the escalation. Multiple escalations can be registered using this feature, that's why historical escalation data can be easily uploaded to our system using the upload page.

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4.2 User Master for Role Update

As shown in below user master screen super admin can easily update the role of user like Admin, Normal User and Quality.

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Steps to change the user role:

1. Search the associate's name in the search field then it will auto pop up the associate employee id
2. Select the role from role category
3. Submit

The screenshot shows the 'User Master' section of the application. A modal window titled 'Add/Update User' is open. Inside the modal, there is a 'Search Associate*' input field containing 'Sachin Kotapure', an 'Associate Employee Id' input field containing '67142', and a 'Role Category*' dropdown menu. The 'Quality' option is selected in the dropdown, and other options like 'Admin' and 'Normal User' are visible. A 'SUBMIT' button is located at the bottom left of the modal.

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4.3 Delete Escalation

As shown in the below figure, only admin has rights to delete escalation. Steps for deletion are as follows.

Step 1: Select the escalation which you want to delete

The screenshot shows the 'Escalation Management' section. On the left, a sidebar menu includes 'Home', 'Register Escalation', 'Dashboard', and 'User-Manual'. The main area displays a table titled 'Open & Resolved Escalations'. The table has columns for Esc. Id, Vertical, Ownership, RBU, Client, Project, Subject, Registration Date, Ageing, and Status. One row, specifically for Escalation ID E10039, is highlighted with a red border. At the bottom of the table, there are pagination controls for 'Rows per page' (set to 5), '1-5 of 23', and navigation arrows.

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Step 2: Then click on the “Delete Escalation” button

The screenshot shows the 'Escalation' tab selected in the navigation bar. The page displays various escalation details such as Escalation Id (E10039), Escalation Owner (Pratik Babar), Quality Manager (Pallavi Chaudhari), Delivery Head (Satyendra Kumar), and other project roles. A file attachment 'Escalations_1_23_2024_local.xlsx' is uploaded. At the bottom right, there are 'SUBMIT', 'RESET', and a red-bordered 'DELETE ESCALATION' button.

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Step 3: It will pop up the confirmation by giving the comment then click on “Submit” button to delete escalation.

The screenshot shows the 'Escalation' tab selected. A confirmation dialog box is overlaid on the page, asking 'Are You Sure' and 'Do you want to Delete this escalation?'. The 'Comments' field contains 'yes'. At the bottom of the dialog are 'SUBMIT' and 'CANCEL' buttons, with 'SUBMIT' also highlighted with a red border.

Step 4: Done, Escalation deleted from the system.

User Guide – Client Escalation Management (ZenClientEscalations)

The screenshot shows the ZenClientEscalations application interface. At the top, there is a navigation bar with icons for home, user profile, and other system functions. The main title is "Zenclient escalations". On the right, a user is logged in as "SystemAdmin CEM". A success message box is prominently displayed in the center, stating "Escalation Updated Successfully , Escalation Status is Changed to Deleted". Below this message, there are several input fields for escalation details: Vertical (Indigo Slate), Client (AIRBUS), Project (AIRBUS NETWORK SERVICES 24), Subject (File upload test), Escalation Id (E10039), and Escalation Status (Deleted). Below these fields, there are tabs for "Escalation", "Escalation Analysis", "Action Planning", and "Comments". The "Escalation" tab is selected. The form contains various dropdowns and input fields for escalation metadata, such as Escalation Id (E10039), Escalation Owner (Pratik Babar), Quality Manager (Pallavi Chaudhari(22050)), Delivery Head (Satyendra Kumar), Subject (File upload test), Project Ownership (EXP SL), VBU Head (Venugopal Reddy), Program Manager (Shuja Uddin), Date Of Escalation (01/01/2024), Service Line Involved (EXP), RBU Head (Rahul Angne), Project Manager (Puneet Matta), Level Of Escalation (Level 1), Client Partner (Satyendra Kumar), SL Head, Escalation Raised By (Pratik), Regional Business Unit (US BFSI), Account Manager, Source Of Information (src), Escalation Description (desc), and Registration Date (24/01/2024).

5. E-mail Notifications, Alerts and Reminders

#	Trigger	Reference Trigger	Type	To Recipient
1	When a new escalation is registered in the system. Submit is clicked on Registration screen.	The escalation is raised at Project Manager / Program Manager / Account Manager / Delivery Head / Client Partner level	Alert	1. Escalation Owner 2.The person who registered the escalation
2	When a new line item in Escalation Action table is created (not for update of action, only for Newly created actions). Email will go to distinct action owners on Submit of button	RCA CA done; actions identified	Alert	1.Action Owner
3	If Action status is not Closed, and last update date is not that of today and it is Monday, then send reminder	Every Monday	Reminder	1.Action Owner
4	On submit button for every line item in the Action table. There could be multiple Action owners for one escalation. Notification should go only when previous and current value is not same and previous value is not null.	Action status changed	Notification	1.Action Owner
5		Escalation Status is changed to Escalation Resolved or Escalation Closed.	Notification	1. Action Owner 2. The person who registered the escalation 3. Escalation Accountable
6	When Escalation owner is changed on the Escalation detail screen - first tab	On Submit of the detail screen, if previous escalation owner is different to current escalation owner.	Alert	1. Escalation Owner
7	When Action owner is changed on the Escalation detail screen-Action tab	On Submit of the detail screen if previous action owner is different to current action owner for an existing action	Alert	1. Action Owner
8	When Escalation Accountability is changed on the Escalation detail screen - second tab	on Submit of the detail screen if previous escalation accountable is different to current escalation accountable.	Alert	1. Escalation Accountable
9	When additional stakeholders are added for an Escalation in the Escalation detail screen	On Submit of the detail screen if there are any additional stakeholders, then send them alerts	Alert	To: Additional Stakeholder CC: ESC_OW, ESC_AC, QM_ID

6. Support and Help

- For any technical issues, make a Service Request to Zensar's IT Help Desk.
- For any other issue/ query, please contact CEM-Admin Team at clientescnadmin@zensar.com

7. Annexure1 – Field Details

#	Excel Columns	Description
1.	Escalation Id	A unique identifier is assigned to each registered escalation, making it easy to distinguish and reference each case individually.
2.	Escalation Date	The date on which the escalation was officially registered or reported. This marks the starting point for tracking the issue.
3.	Registration Date	The date when the escalation was formally recorded or entered the system, which may differ from the escalation date.
4.	Source of Information	Indicates where the information about the escalation originated. It could be from the Client, internal team, or other sources.
5.	Vertical	Represents the specific business area or department within the company that the registered escalation pertains to.
6.	Service Line	Specifies the type of service or product line associated with the escalation, providing context about the issue's nature.
7.	RBU (Regional Business Unit)	Denotes the regional business unit responsible for managing or addressing the escalation within a larger organization.
8.	Client Name	The name of the Client who reported or is affected by the escalation, helping to identify the involved parties.
9.	Escalation Subject	A brief description or summary of the subject or topic of the registered escalation, providing a quick overview of the issue.
10.	Escalation Raised By	The name or identity of the person or entity who raised or reported the escalation, identifying the source of the problem.
11.	Level of Escalation	Indicates the severity or priority level assigned to the escalation, helping in prioritizing and addressing cases accordingly.
12.	Severity	Specifies the seriousness or impact level of the escalation, typically categorized as low, medium, or high, to guide response efforts.
13.	Complexity	Reflects the complexity or intricacy of the escalation, indicating how challenging it might be to resolve the issue effectively.
14.	Project Name	Identifies the specific project or initiative to which the escalation is related, providing project context.
15.	Project Track	Indicates the track or phase of the project associated with the escalation, helping to pinpoint where the issue arose.
16.	Escalation Description	Offers a detailed narrative or explanation of the registered escalation, including background information and specifics.
17.	Escalation Owner	The individual or team responsible for managing and resolving the registered escalation, ensuring accountability.
18.	Escalation Accountability	Defines the extent of responsibility and accountability held by the escalation owner in resolving the issue.
19.	Escalation Analysis	Describes the root cause or underlying reasons behind the registered escalation, aiding in comprehensive issue understanding.
20.	Escalation Status	Provides information on the status or stage of resolution for the escalation, such as open, in progress, or closed.
21.	Actions	Details the specific actions, steps, or measures taken to address and resolve the registered escalation.
22.	Planned Date	Specifies the target or planned date for the resolution of the escalation, indicating when it should ideally be resolved.
23.	Actual Date	Records the actual date when the escalation was successfully resolved, providing historical data for analysis.
24.	Resolution Comments	Includes comments or notes related to the resolution of the escalation, offering insights into the solution provided.

25.	Quality Manager	Identifies the quality manager or individual responsible for ensuring that the resolution meets quality standards.
26.	Last Update Date	Displays the date when the last update or change was made to the information regarding the escalation.
27.	Project Annual Revenue (USD)	States the annual revenue associated with the project connected to the escalation, indicating financial implications.
28.	Penalty Applicable	Indicates whether any penalties or consequences apply to the resolution of the escalation, particularly in contractual agreements.

8. Annexure 2 - Ageing Calculation

#	Escalation Status	Ageing Calculation
1	For Open Status	Registration Date – Current Date
2	For Closed Status	Registration Date – Escalation Closed Date
3	For Resolved Status	Registration Date – Escalation Resolved Date

9. Glossary

Term	Definition
Action Plan	A structured approach outlining the necessary steps and tasks to resolve a client escalation efficiently and effectively.
Admin	An authorized user role within the CEM Tool responsible for managing user access, configurations, and overseeing escalation processes.
Ageing	Refers to the time for how long an escalation is/was open, calculated based on different statuses such as open, resolved, or closed.
Analysis Tab	A section within the Escalation Detail Page where the causes, severity, and impacts of the escalation on Zensar are recorded, aiding in resolution planning.
Client Escalation	A formal notification or complaint raised by a client regarding issues, concerns, or problems encountered during a project.
Comments Tab	A section within the Escalation Detail Page for stakeholders to add comments, discuss the escalation, and provide status updates.
Complexity	An attribute of escalations denotes the level of intricacy or complication associated with a particular Client escalation.
Escalation Accountability	The degree of responsibility assigned to the escalation owner for resolving the registered Client escalation.
Escalation Analysis	A detailed examination of the causes, impacts, and implications of a client escalation to determine appropriate resolution strategies.
Escalation Detail Page	A dedicated page for each registered escalation, displaying comprehensive information, interactions, and stages related to the escalation's resolution.
Escalation Owner	The individual responsible for managing and resolving a specific Client escalation within the CEM Tool.
Escalation Status	The current state or phase of a client escalation, indicating whether it is open, resolved, or closed.
Level of Escalation	The categorization of a client escalation based on its severity, significance, or impact on ongoing projects.
Registration Page	The section of the CEM Tool where users can register a new escalation, providing essential details about the Client, project, and issue.
Resolution Comments	Comments and notes added by stakeholders, especially the escalation owner, to provide insights and updates on the resolution progress.
Severity	An attribute of Client escalations that indicates the extent of impact, urgency, or seriousness of the reported issue or problem.
Summary Dashboard Page	A page providing an overview of escalations, categorized by verticals, service lines, or regional business units, with details on open, resolved, and closed escalations.
Super Admin	The highest level of user role within the CEM Tool, possessing extensive administrative privileges and access control capabilities.

10. Acronyms

Acronyms	Explanation
CEM	Client Escalation Management
SSO	Single Sign-On
RBU	Regional Business Unit
BFSI	Banking, Financial Services, and Insurance
HTE	Hi-Tech and Engineering
MCS	Manufacturing and Consumer Services
ADM	Application Development and Maintenance
AES	Advanced Engineering Services
DEA	Data Engineering and Analytics
EXP	Experience services
FS	Foundation services
SaaS	Software as a Service (Enterprise Application)
USD	United States Dollar
RCA	Root Cause Analysis
CA	Corrective Action
CEO	Chief Executive officer
COO	Chief Operating officer
CQO	Chief Quality Officer