Demo Script for B-CARE Helpdesk

1. Anonymous user (Jonathan) accesses the B-CARE website (use incognito tab in Chrome)
   1. About: User can see about page (user Story 1a)
   2. Training Materials: User can see training materials (and download them)
      1. User Manuals
         1. Scroll Through first one (PDF) using Slideshare Controls (using scroll bar and/or mouse wheel, NOT big arrow buttons at bottom)
         2. Use full screen, then minimize
         3. Scroll through second (PPT) one using arrows at bottom
         4. Download FIRST one (note, it comes down as a PPT even though it’s a PDF)
      2. Past Webinars
         1. Play webinar using slideshare Controls
         2. Use full screen
         3. Seek to specific points
   3. Webinars: User can see the webinar calendar and register for training webinar
      1. Click on Dec 25th Webinar to create popup
      2. Click on confertel link
      3. Register for Webinar
         1. Receive Confirmation Email? (Can take up to 20 mins—may show up later in demo)
   4. FAQ/Help Desk:
      1. Search for content
         1. Type in “webinars”
            1. See one result in community
            2. Click on Browse Knowledge Base
      2. See Announcements, FAQ, Community
         1. Click on an item in ANNOUNCEMENTS section
         2. Back button them click on one of the FAQa
         3. Use cookie crumbs to navigate back
         4. Click on brose link next to Community
         5. See topics
         6. Click on one of the topics that has questions
   5. Contact Us:
      1. Click on Email Us
         1. Email client pops up
      2. Click on Try Us Online
         1. Takes user back to help desk
      3. User calls number to simulate call to Agent
2. Agent (Pat) answers phone
   1. Agent Uses Add tab (+ sign in upper left) to create new ticket
      1. Requester
         1. Once some letters are typed in, Zendesk autocompletes to likely requester names
         2. Can see Tab next to New Ticket with Caller’s name and request history
         3. Can see Organization (create) tab where we can create an organization
      2. Assignee
      3. Type?
      4. Priority?
      5. Tags (see above)
      6. Topic
      7. Subject
      8. Description
      9. Add link to existing documentation
      10. Click Submit as **Solved** at bottom
   2. User receives a notification
   3. Ticket is maintained in the database
      1. Click on Zendesk logo on left, see list of tickets
3. User logs-in using existing credentials from another site (or register with email/password, receives verification email)
   1. Login link at top Use existing Account
      1. Use Sign In link at bottom: pat@geobliki.com, pw: 1geobliki2
      2. Update Profile with:
         1. First Name
         2. Last Name
         3. Display Name
         4. Phone
         5. Email
         6. Hospital (Hun or Mar)
         7. **DON’T** hit submit
   2. User creates a new ticket
      1. Use Drop down next to login name
      2. Create ticket (Topic B-CARE - Portal)
      3. Fill out info
      4. Hit submit
      5. Agentreceives an email (show)
      6. User receives an email
   3. Agent receives notification (rule) and responds to ticket and closes it can be late? Never happened
   4. User posts a public question
   5. User logs out
   6. All users see the question
4. Agent logs in as agent and sees new ticket
   1. Agent resolves ticket
   2. User receives notification and sees status changed to resolved
5. Content Creator:
   1. Calendar:
      1. Creates a new calendar entry with Webinar info
      2. Notifies users of new webinar
   2. Zendesk:
      1. Creates new FAQ Topic/Category
      2. Creates new FAQ Entry
   3. Slideshare:
      1. Uploads new file to Slideshare with appropriate tags so it shows up on site (demonstrate?)
   4. Screensteps:
      1. Creates new Screensteps document/content
   5. Submits content for approval
6. Content Administrator:
   1. Sees content requesting approval, approves
7. Help Desk Admin:
   1. Views main report dashboard
   2. Views biweekly report
   3. Creates custom report?
   4. Edits user info? (Can’t an agent do this?)
   5. Creates hospital/Edit a hospital info
   6. Creates routing rules?