Gulf Aluminium Rolling Mill Company

ICT Department

Service Management System

Customer Referral Case Module

User Guide Manual

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Ext. No: 3152

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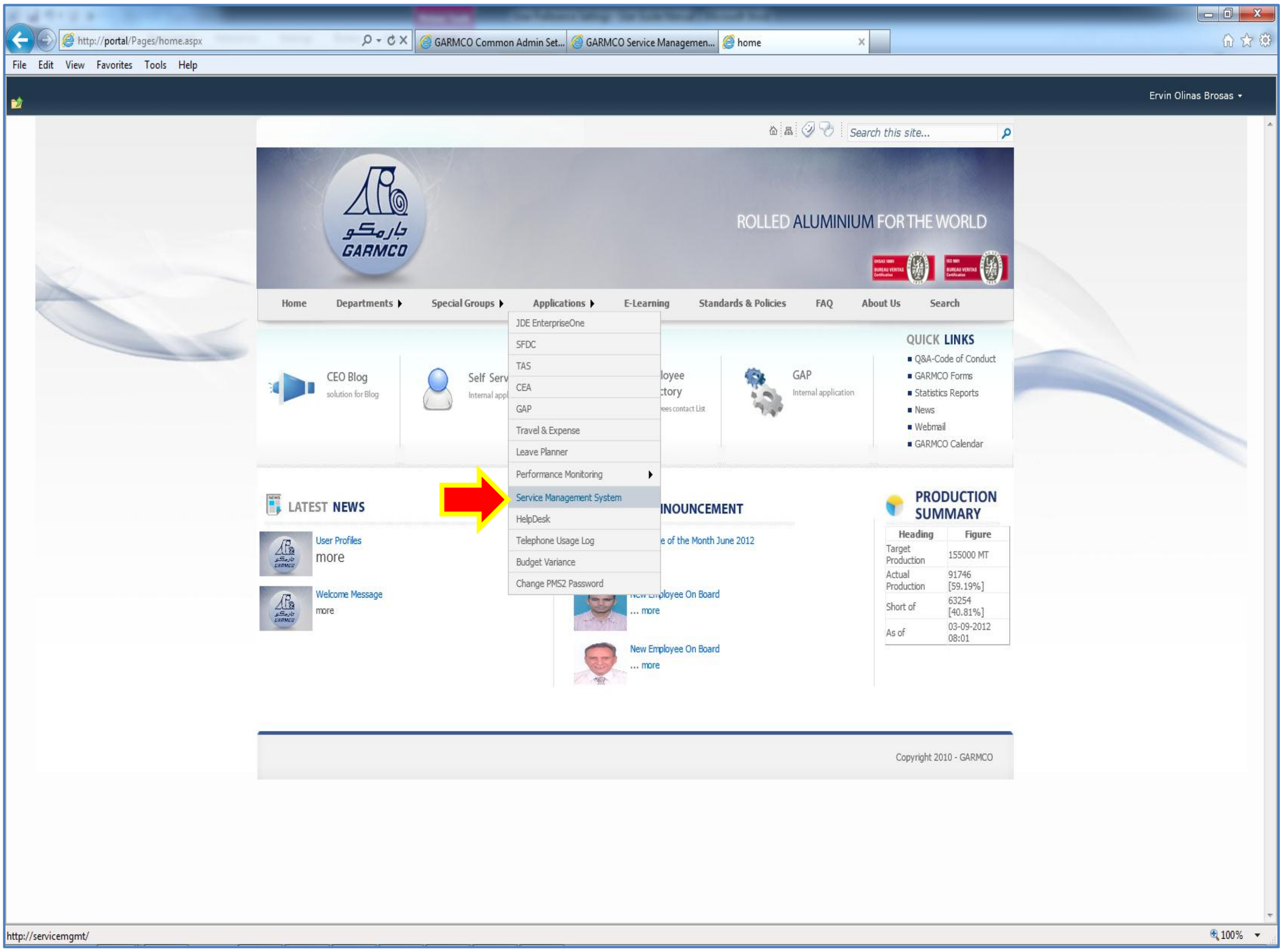
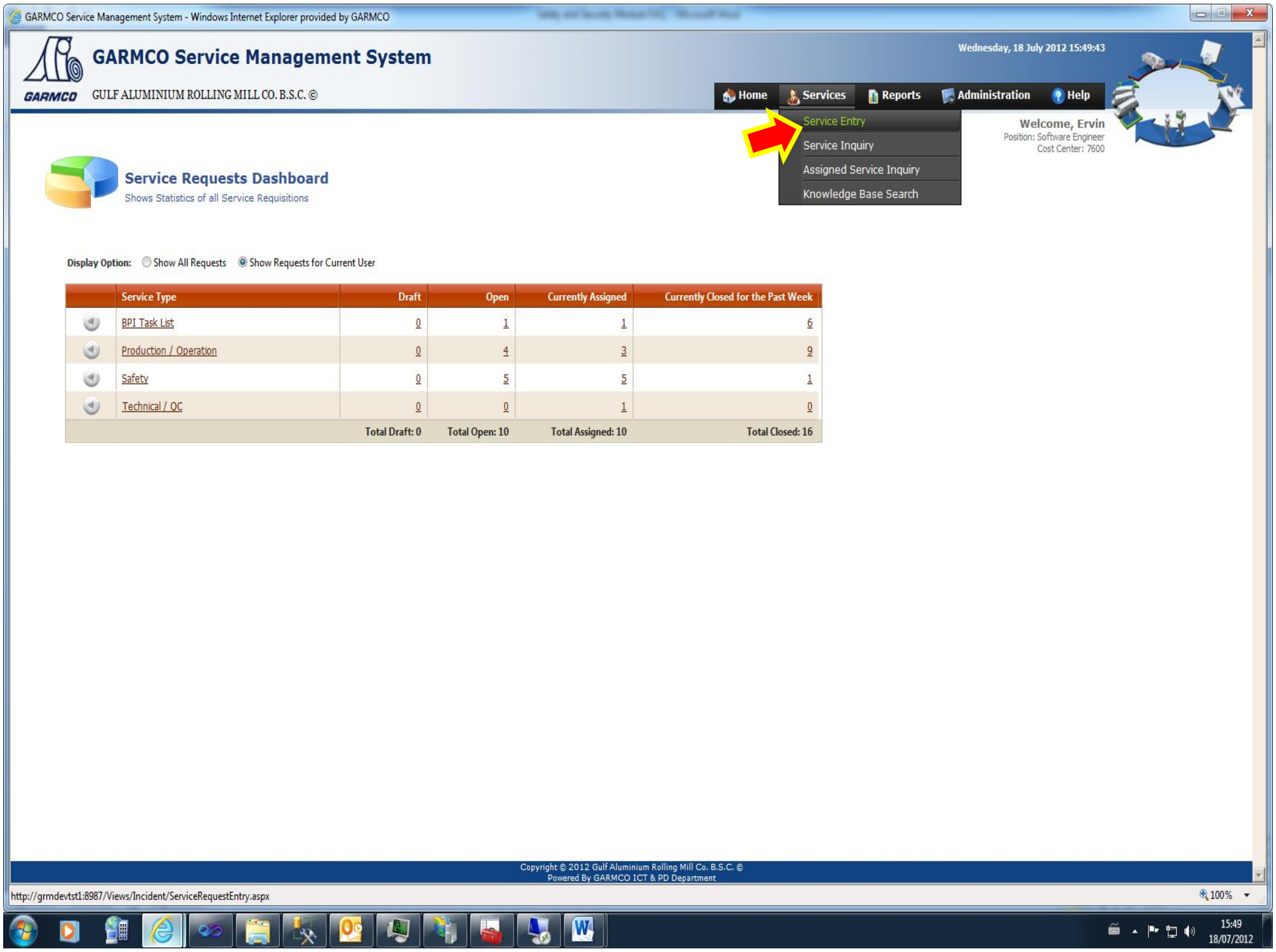
How to Create Customer Referral Case Incident Report?

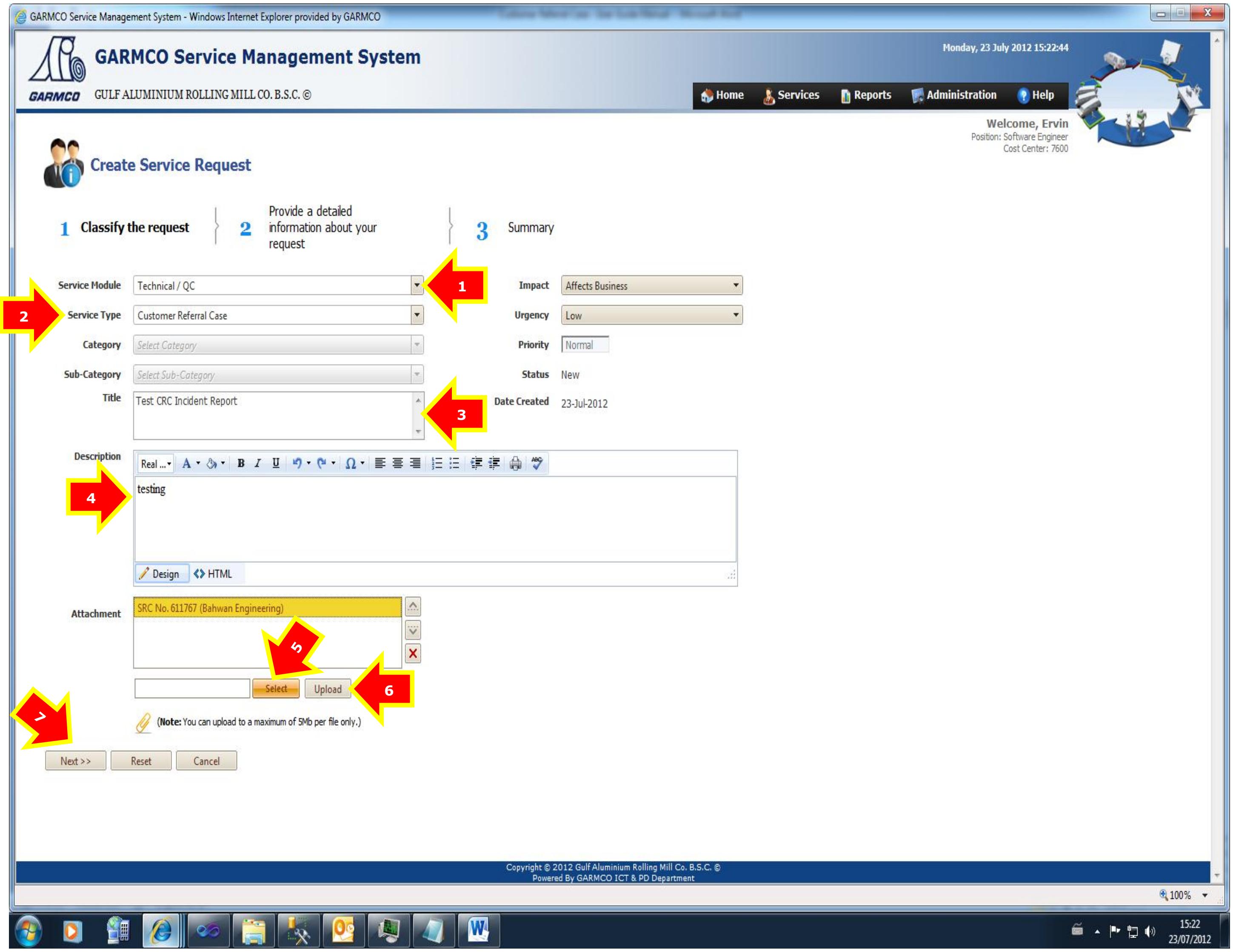
1. Go to GARMCO portal and click **Service Management System** link from the **Applications** menu.



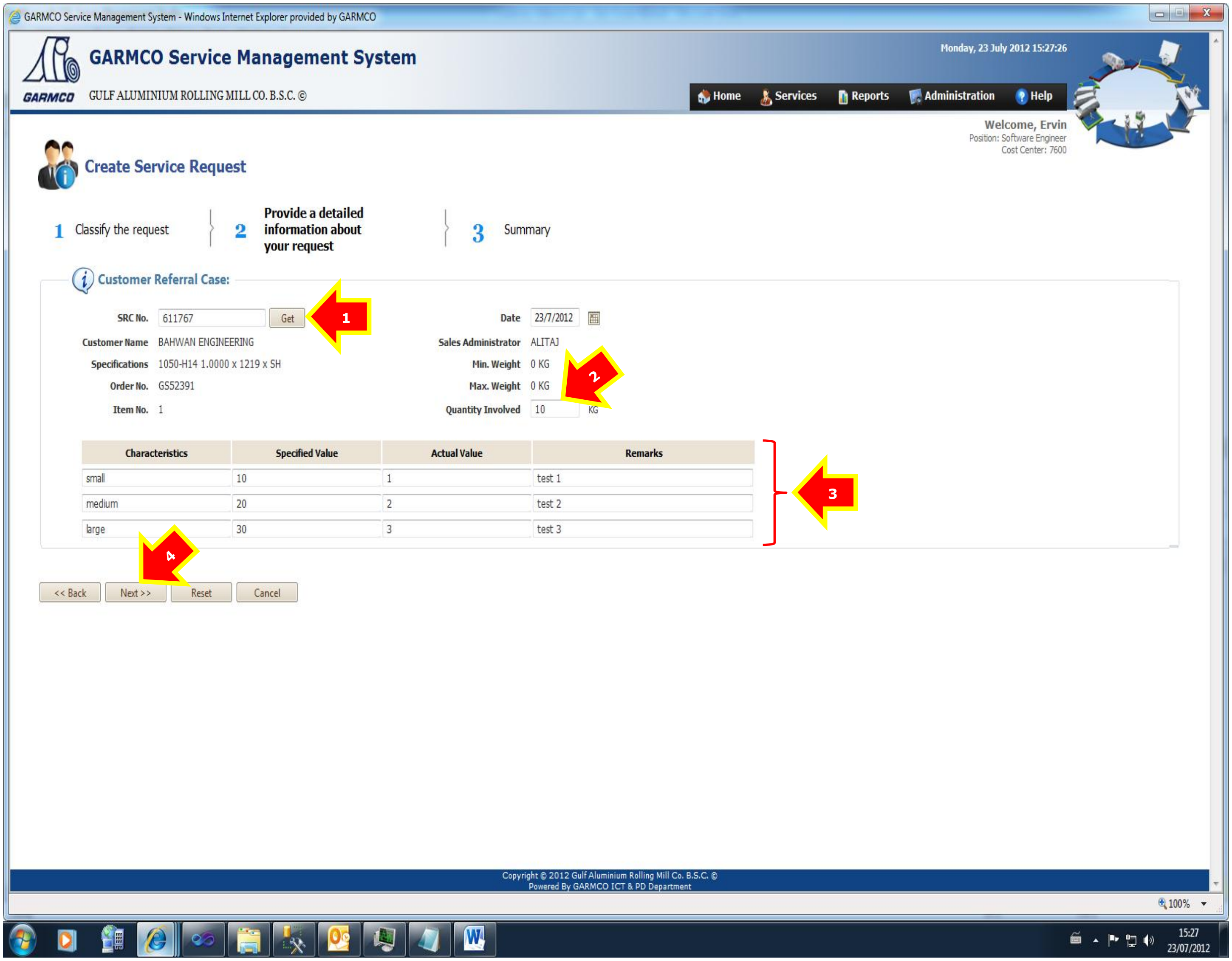
2. The “Service Requests Dashboard” form will be shown. From the **Services** menu, click **Service Entry** to open the data entry form for creating a new service request or incident report.



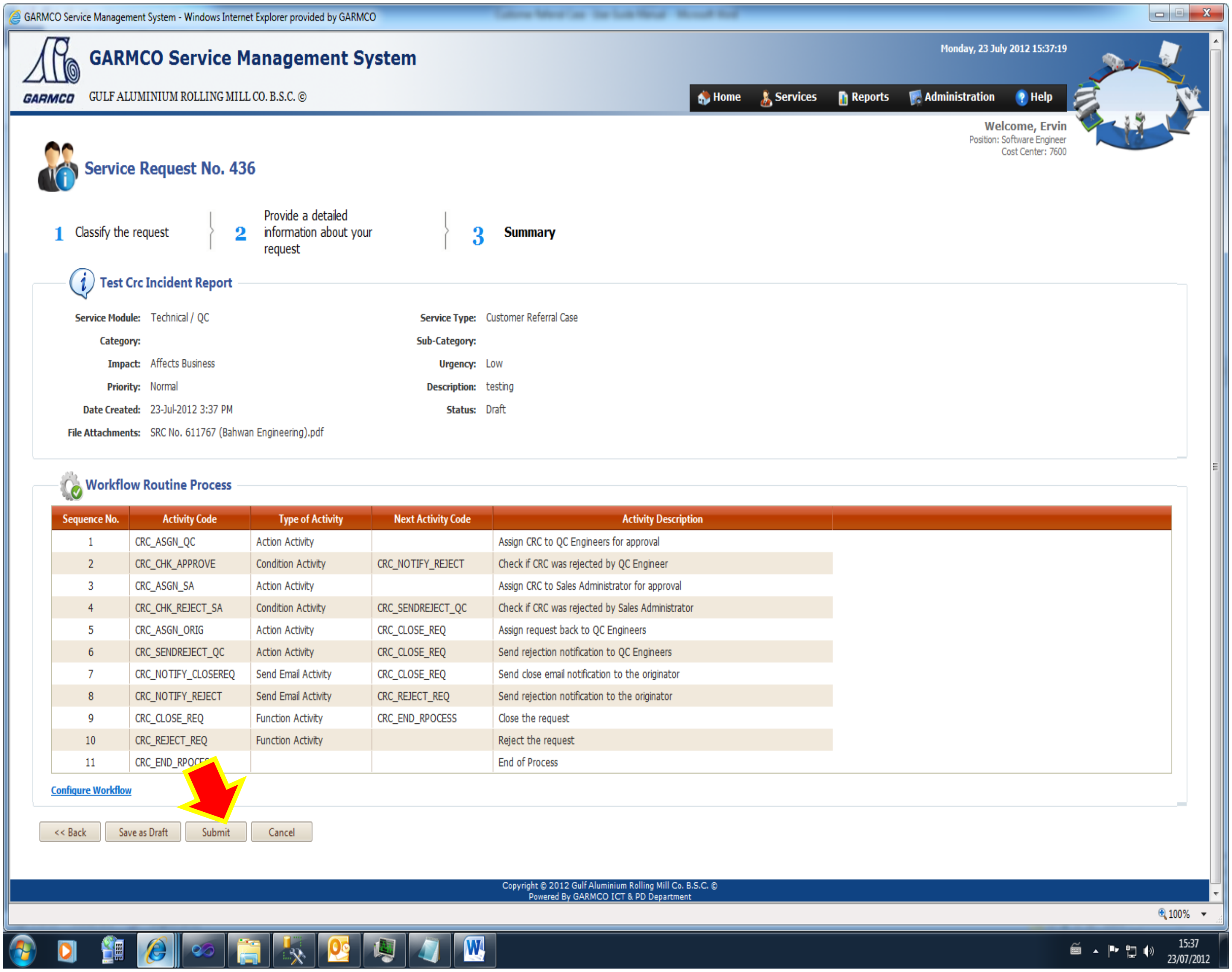
3. In the "**Create Service Request**" form, select **Technical / QC** from the "Service Module" drop-down list. Select **Customer Referral Case** from the "Service Type" drop-down list. Enter value for the **Title** and **Description** fields. Optionally, you can add file attachments by clicking the **Select** and **Upload** button respectively. Click **Next** button when data entry is done. The process is best illustrated below:



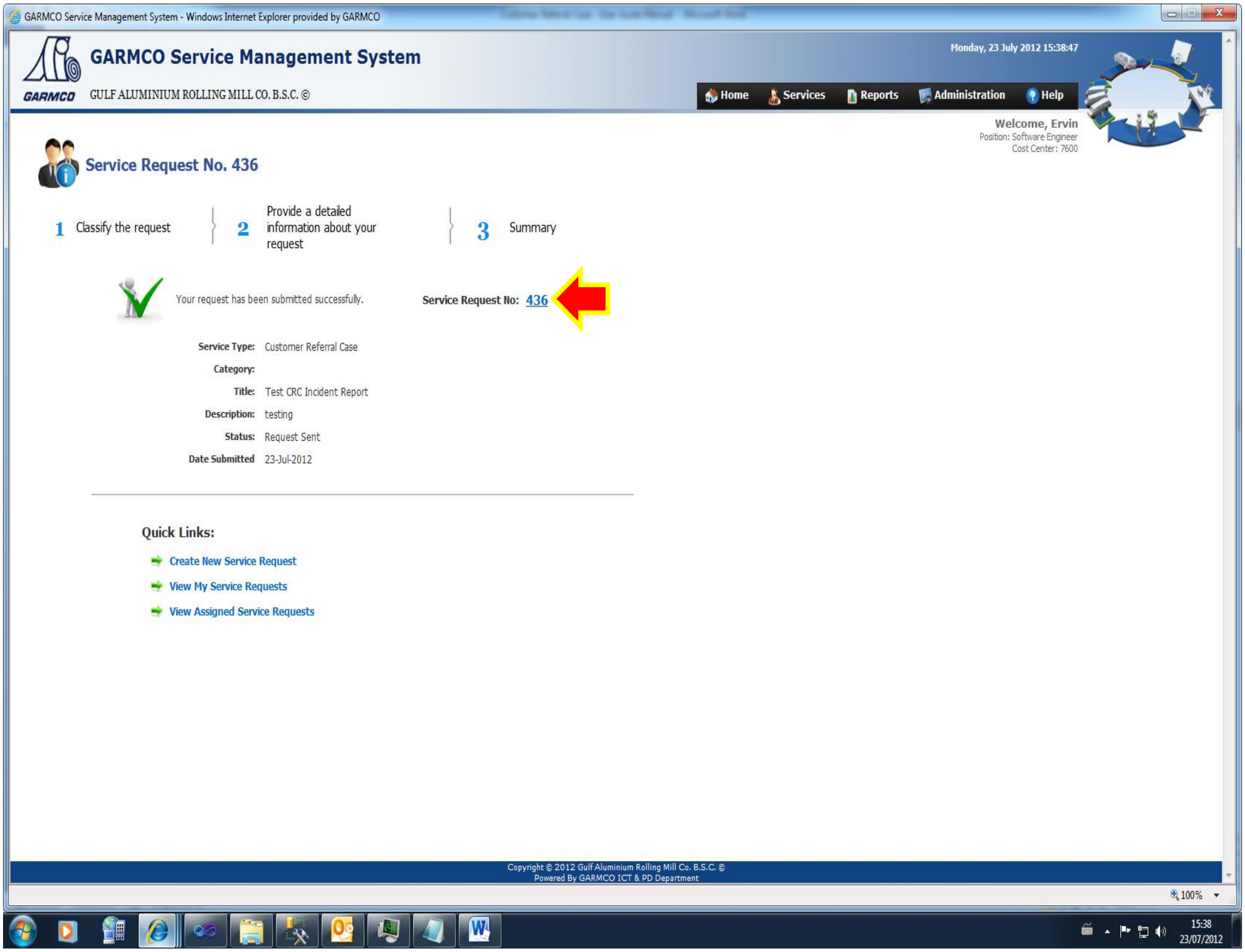
4. In the "**Provide detailed information about your request**" page, enter the **SRC No.** then click **Get** button. The system will look for details about the SRC and will display relevant information such as the "Customer Name", "Specification", "Order No", "Item No", "Sales Administrator", "Minimum Height", and "Minimum Width". The value of the **Date** field is set to the current system date. Enter value for the **Quantity Involved**. Supply values for the **Characteristics**, **Specified Value**, **Actual Value** and **Remarks** fields. You can enter data up to 3 rows. Click **Next** button when done. The process is best illustrated below:



5. In the "**Summary**" page, the detailed information about the request is displayed as well as the workflow routine process which is presented in the grid. Click **Save as Draft** button to save the request as a draft. Otherwise, click **Submit** button to finalize and submit the request. After submission, the workflow engine wakes up and executes the routine activities. Shown below is the screenshot of the Summary page:

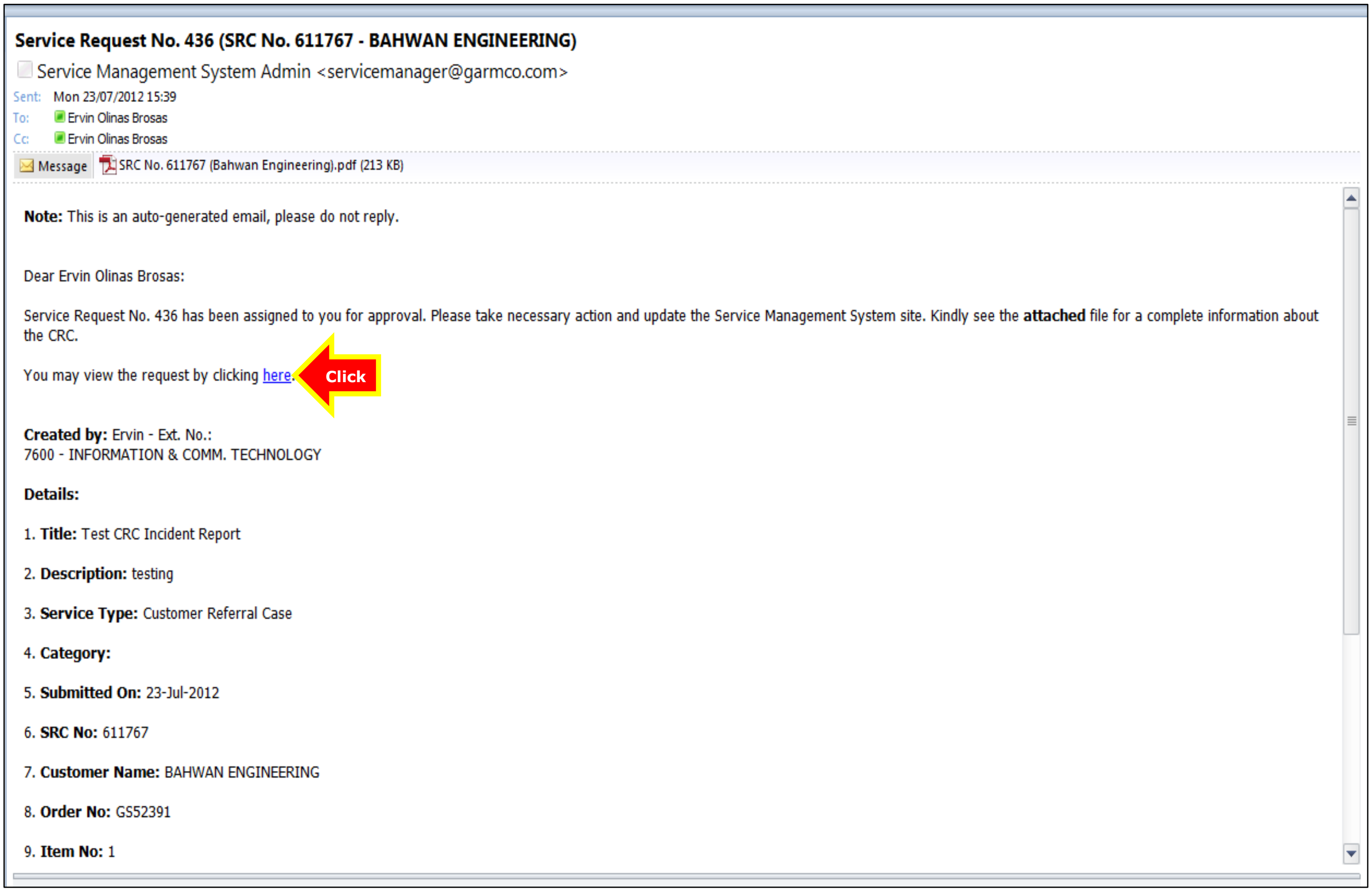


6. The final page will display information about the submitted request. After submission, an email notification will be sent to the originator/creator and to the assigned service provider or approver as specified in the workflow. To view more information about the request, click the generated **Service Request No.** link.



How to Approve and do Actions on an Assigned Request?

1. As an assigned approver, an email notification will be sent to your mailbox. Click the link provided in the message body. Doing so will open the Service Management System– Service Request Resolution page automatically. A similar email notification is shown below:



Service Request No. 436 (SRC No. 611767 - BAHWAN ENGINEERING)

Service Management System Admin <servicemanager@garmco.com>

Sent: Mon 23/07/2012 15:39

To: Ervin Olinas Brosas

Cc: Ervin Olinas Brosas

Message | SRC No. 611767 (Bahwan Engineering).pdf (213 KB)

Note: This is an auto-generated email, please do not reply.

Dear Ervin Olinas Brosas:

Service Request No. 436 has been assigned to you for approval. Please take necessary action and update the Service Management System site. Kindly see the **attached** file for a complete information about the CRC.

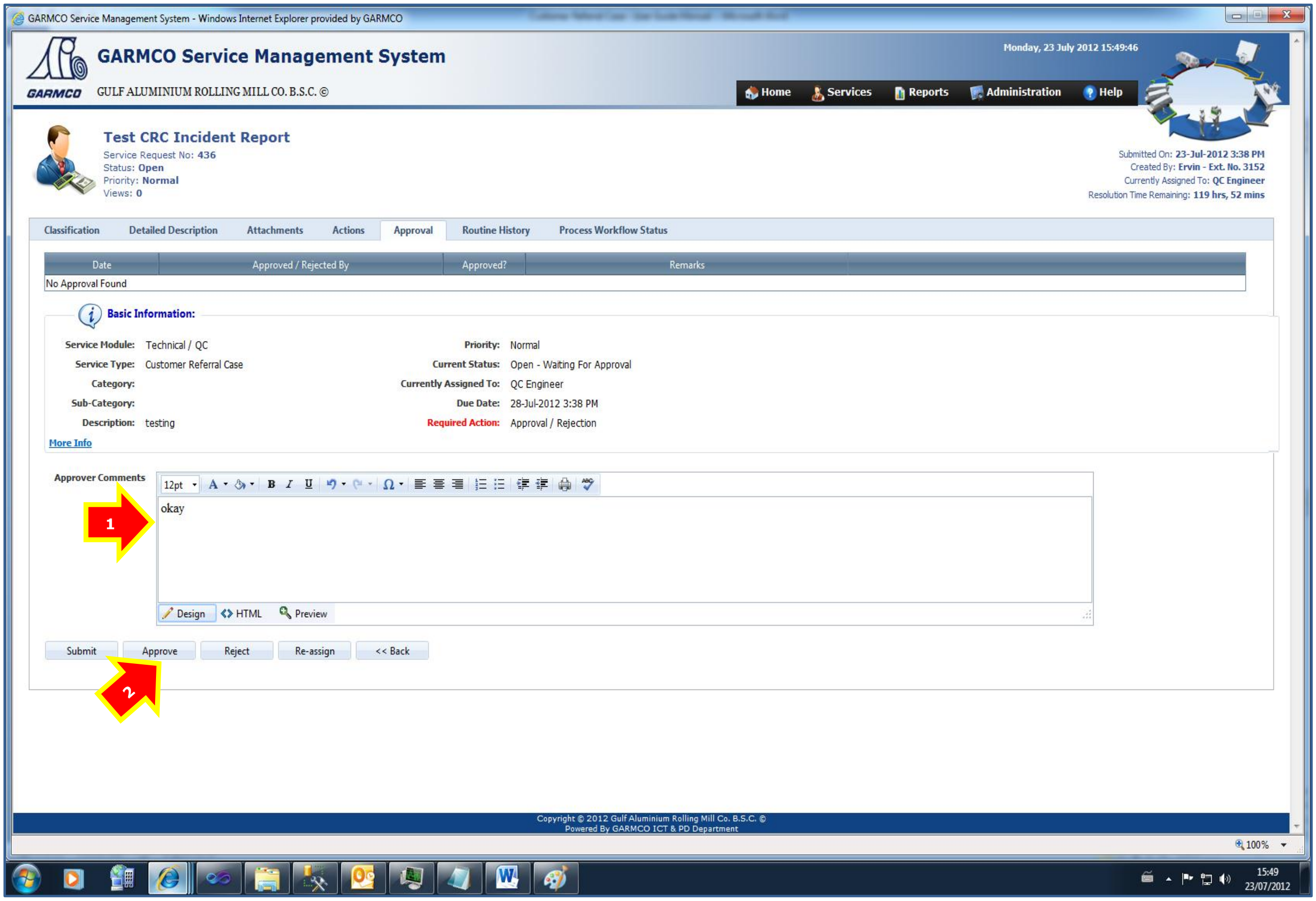
You may view the request by clicking here.

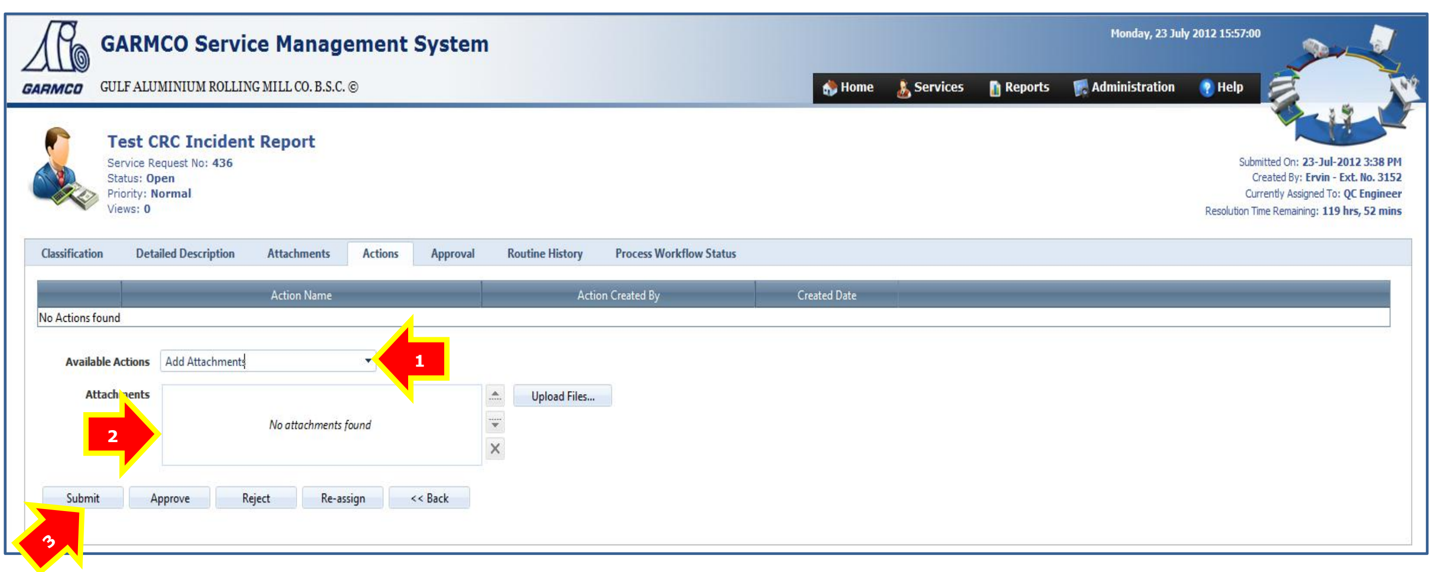
Created by: Ervin - Ext. No.:
7600 - INFORMATION & COMM. TECHNOLOGY

Details:

1. **Title:** Test CRC Incident Report
2. **Description:** testing
3. **Service Type:** Customer Referral Case
4. **Category:**
5. **Submitted On:** 23-Jul-2012
6. **SRC No:** 611767
7. **Customer Name:** BAHWAN ENGINEERING
8. **Order No:** GS52391
9. **Item No:** 1

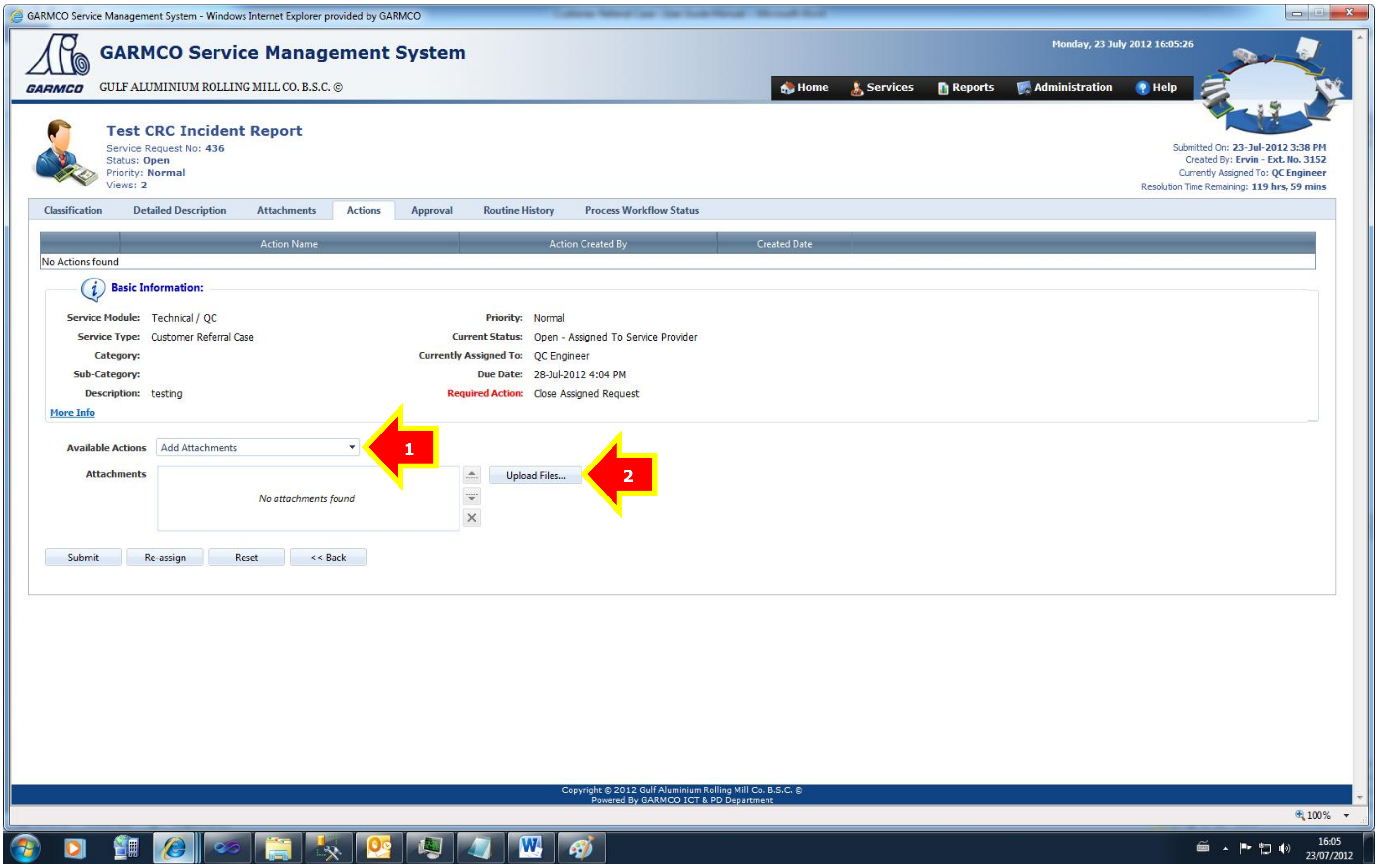
2. In the Service Request Resolution page, you can optionally enter some comments then click the **Approve** button to approve the request. Otherwise, click the **Reject** button to reject the request. Take note that comments is required when rejecting a request. Also, prior to approval you can do other actions such as “Adding Attachments”, “Sending Email”, “Organizing Meeting”, “Escalating the Request” and others by clicking the **Actions** tab. In the **Available Actions** list, select the desired action then enter data for the required fields. Click **Submit** button when done. Shown below is the **Approval** and **Actions** tab respectively:



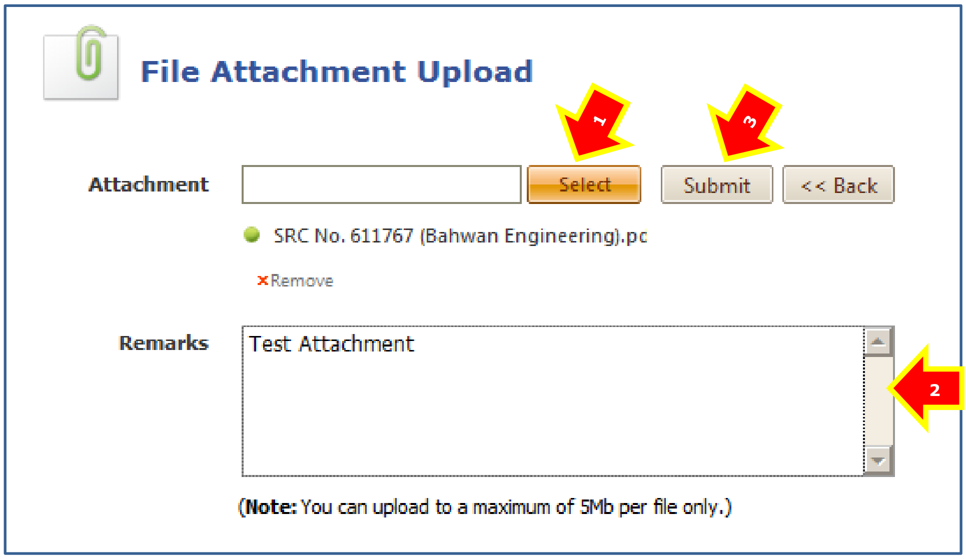


How to Add File Attachments?

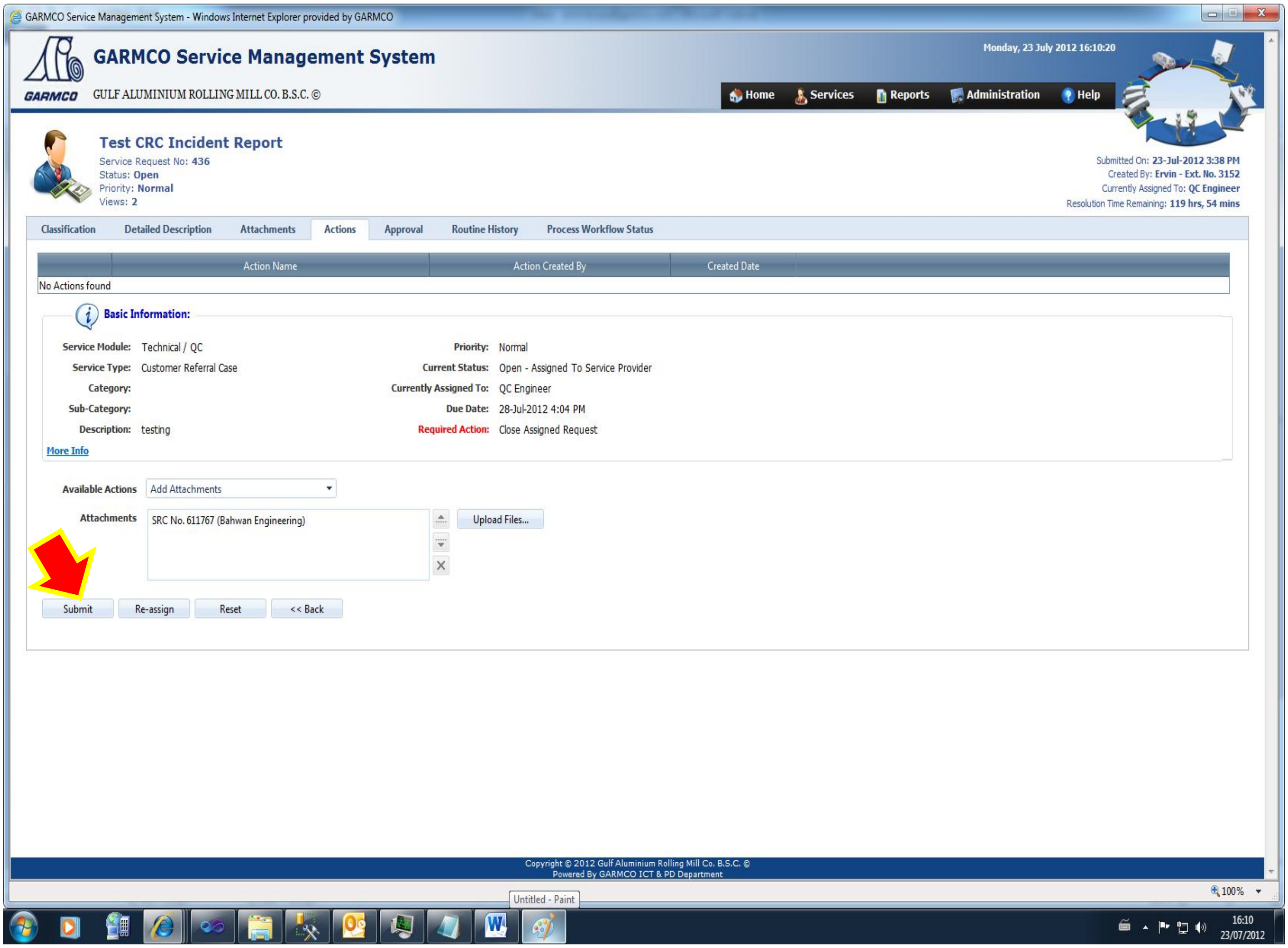
1. In the Service Request Resolution page, select **Add Attachments** from the “Available Actions” drop-down list. Click **Upload Files** button to open “File Attachment Upload” form as shown below:



2. In the “File Attachment Upload” form, click **Select** button to browse for files to upload. Take note that the maximum file size per attachment is only 5 MB. Optionally, you can enter value for the **Remarks** field. Click the **Submit** button when done.

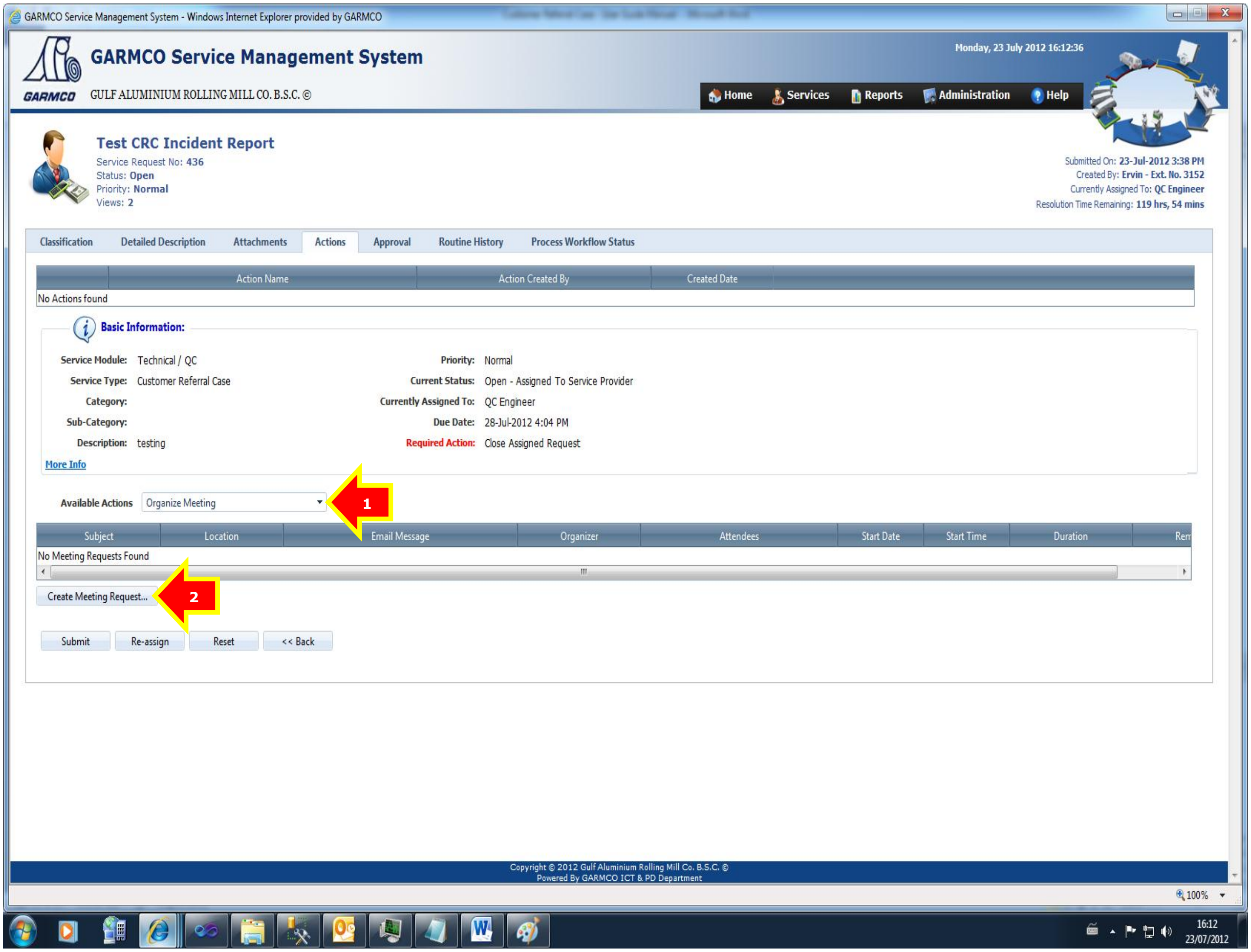


3. The uploaded file attachments will appear on the **Attachments** list. Click **Upload Files** button if you want to upload more files. Otherwise, click **Submit** button to submit the action and end the process.

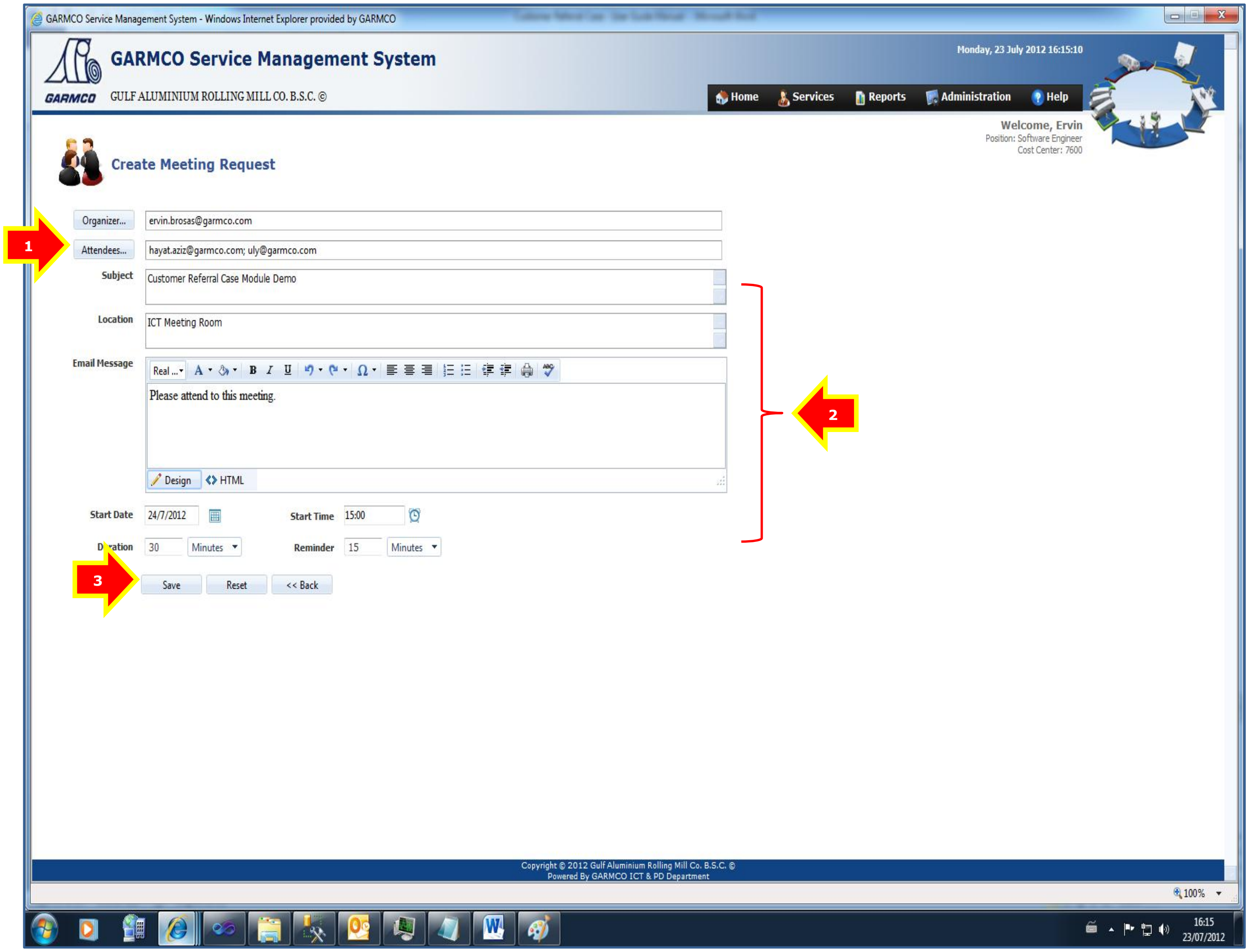


How to Organize a Meeting?

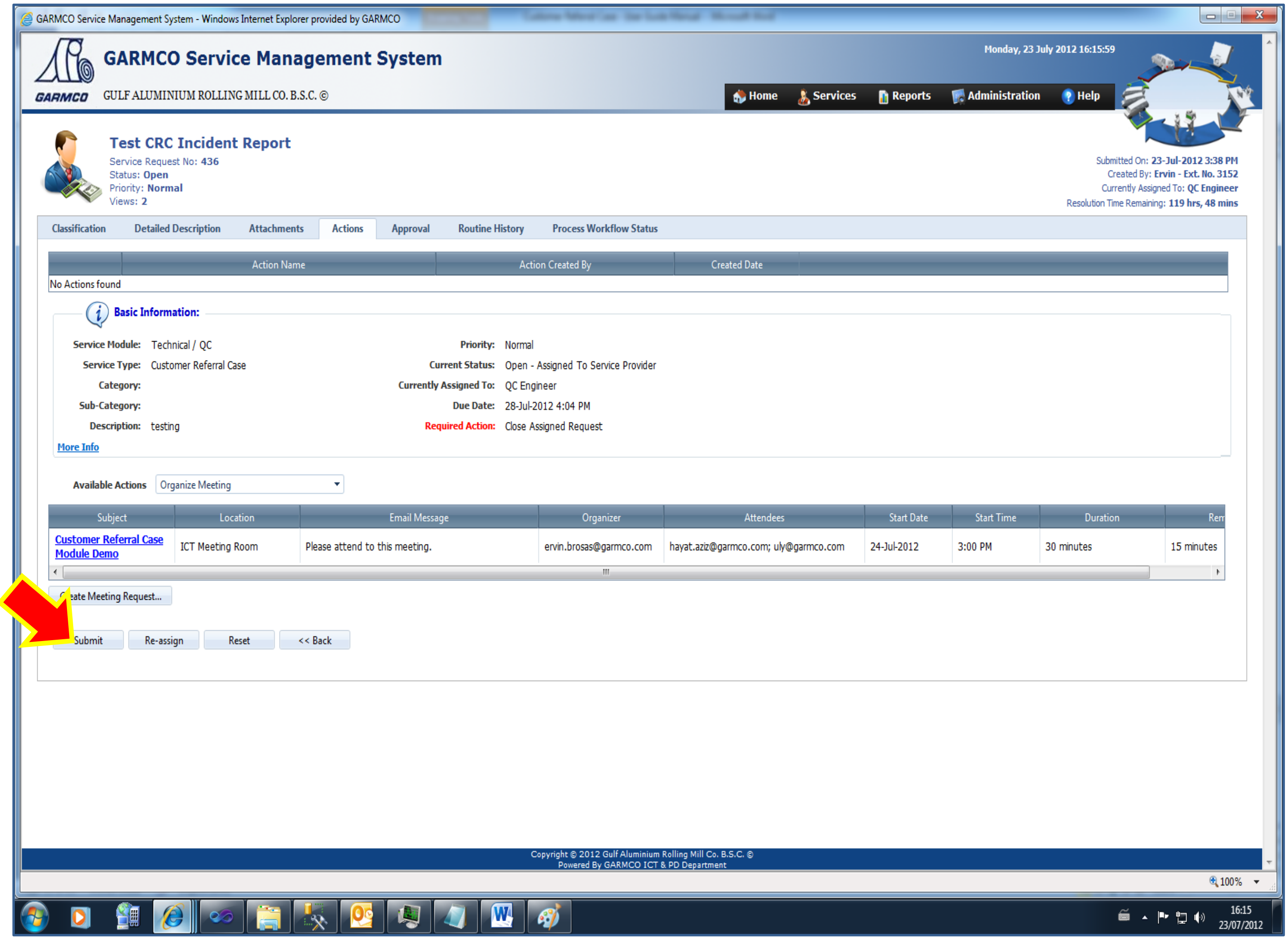
1. In the Service Request Resolution page, select **Organize Meeting** from the "Available Actions" drop-down list. Click the **Create Meeting Request** button to open the "Create Meeting Request" form. The process is best illustrated below:



2. Click the **Attendees** button to search for employees. You can type-in directly the email address of an attendee into the textbox control. (*Note: Multiple attendees email address must be separated by a semicolon character.*) Enter data for the “Subject”, “Location”, “Email Message”, “Start Date”, “Start Time”, “Duration” and “Reminder” fields. Click the **Save** button when done.



3. In the Service Request Resolution page, the newly added meeting request appears on the grid. To add more meeting request, click **Create Meeting Request** button. Otherwise, click **Submit** button to submit the action and end the process.



How to Send an Email?

1. In the Service Request Resolution page, select **Send Email** from the "Available Actions" drop-down list. Enter the email address of the recipient into the **To** textbox field and optionally into the **Cc** textbox field. To search for an employee, click the **To** button or **Cc** button accordingly. Enter value for the **Subject** and **Message** fields. Click **Submit** button when done. The process is best illustrated below: