



Gulf Aluminium Rolling Mill Company

ICT Department

Service Management System

Customer Referral Case Module

User Guide Manual

Prepared By:

Ervin Brosas
Ext. No: 3152

Table of Contents

How to Create Customer Referral Case Incident Report?	3
How to Approve and do Actions on an Assigned Request?	9
How to Add File Attachments?	11
How to Organize a Meeting?	13
How to Send an Email?	16

How to Create Customer Referral Case Incident Report?

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

The screenshot shows the GARMCO portal homepage. The browser address bar displays 'http://portal/Pages/home.aspx'. The page features the GARMCO logo and the tagline 'ROLLED ALUMINIUM FOR THE WORLD'. A navigation menu at the top includes 'Home', 'Departments', 'Special Groups', 'Applications', 'E-Learning', 'Standards & Policies', 'FAQ', 'About Us', and 'Search'. The 'Applications' dropdown menu is open, showing a list of links: 'JDE EnterpriseOne', 'SFDC', 'TAS', 'CEA', 'GAP', 'Travel & Expense', 'Leave Planner', 'Performance Monitoring', 'Service Management System', 'HelpDesk', 'Telephone Usage Log', 'Budget Variance', and 'Change PMS2 Password'. A red arrow points to the 'Service Management System' link. Other sections on the page include 'CEO Blog', 'Self Service', 'GAP', 'QUICK LINKS', 'LATEST NEWS', 'ANNOUNCEMENT', and 'PRODUCTION SUMMARY'.

Heading	Figure
Target Production	155000 MT
Actual Production	91746 [59.19%]
Short of	63254 [40.81%]
As of	03-09-2012 08:01

Copyright 2010 - GARMCO

- 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.

The screenshot displays the GARMCO Service Management System interface. The top navigation bar includes links for Home, Services, Reports, Administration, and Help. A red arrow points to the 'Service Entry' option in the Services dropdown menu. The main content area features the 'Service Requests Dashboard' with a table showing service request statistics. The table has columns for Service Type, Draft, Open, Currently Assigned, and Currently Closed for the Past Week. The data is as follows:

Service Type	Draft	Open	Currently Assigned	Currently Closed for the Past Week
BPI Task List	0	1	1	6
Production / Operation	0	4	3	9
Safety	0	5	5	1
Technical / QC	0	0	1	0
Total	0	10	10	16

At the bottom of the page, there is a copyright notice: Copyright © 2012 Gulf Aluminium Rolling Mill Co. B.S.C. ©. Powered By GARMCO ICT & PD Department. The URL in the address bar is http://grmdevst1:8987/Views/Incident/ServiceRequestEntry.aspx.

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:

The screenshot displays the 'Create Service Request' form within the GARMCO Service Management System. The form is divided into three main sections: 1. Classify the request, 2. Provide a detailed information about your request, and 3. Summary. The form includes various input fields and buttons, with red arrows and numbers indicating the sequence of steps for data entry:

- 1**: Select 'Technical / QC' from the 'Service Module' drop-down list.
- 2**: Select 'Customer Referral Case' from the 'Service Type' drop-down list.
- 3**: Enter 'Test CRC Incident Report' in the 'Title' field.
- 4**: Enter 'testing' in the 'Description' text area.
- 5**: Click the 'Select' button to add an attachment.
- 6**: Click the 'Upload' button to upload a file.

At the bottom of the form, there are buttons for 'Next >>', 'Reset', and 'Cancel'. The footer of the page indicates the copyright is © 2012 Gulf Aluminium Rolling Mill Co. B.S.C. ©, powered by GARMCO ICT & PD Department.

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:

GARMCO Service Management System - Windows Internet Explorer provided by GARMCO

GARMCO Service Management System
GULF ALUMINIUM ROLLING MILL CO. B.S.C. ©

Monday, 23 July 2012 15:27:26

Home Services Reports Administration Help

Welcome, Ervin
Position: Software Engineer
Cost Center: 7600

Create Service Request

1 Classify the request } 2 **Provide a detailed information about your request** } 3 Summary

Customer Referral Case:

SRC No. 611767 **Get** 1 Date 23/7/2012

Customer Name BAHWAN ENGINEERING Sales Administrator ALITAJ

Specifications 1050-H14 1.0000 x 1219 x SH Min. Weight 0 KG 2

Order No. GS52391 Max. Weight 0 KG

Item No. 1 Quantity Involved 10 KG

Characteristics	Specified Value	Actual Value	Remarks
small	10	1	test 1
medium	20	2	test 2
large	30	3	test 3

 3

4

<< Back Next >> Reset Cancel

Copyright © 2012 Gulf Aluminium Rolling Mill Co. B.S.C. ©
Powered By GARMCO ICT & PD Department

100%

15:27 23/07/2012

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:

GARMCO Service Management System
GULF ALUMINIUM ROLLING MILL CO. B.S.C. ©

Monday, 23 July 2012 15:37:19

Welcome, Ervin
Position: Software Engineer
Cost Center: 7600

Service Request No. 436

1 Classify the request | 2 Provide a detailed information about your request | 3 **Summary**

Test Crc Incident Report

Service Module: Technical / QC
Category: Affects Business
Impact: Affects Business
Priority: Normal
Date Created: 23-Jul-2012 3:37 PM
File Attachments: SRC No. 611767 (Bahwan Engineering).pdf

Service Type: Customer Referral Case
Sub-Category:
Urgency: Low
Description: testing
Status: Draft

Workflow Routine Process

Sequence No.	Activity Code	Type of Activity	Next Activity Code	Activity Description
1	CRC_ASGN_QC	Action Activity		Assign CRC to QC Engineers for approval
2	CRC_CHK_APPROVE	Condition Activity	CRC_NOTIFY_REJECT	Check if CRC was rejected by QC Engineer
3	CRC_ASGN_SA	Action Activity		Assign CRC to Sales Administrator for approval
4	CRC_CHK_REJECT_SA	Condition Activity	CRC_SENDREREJECT_QC	Check if CRC was rejected by Sales Administrator
5	CRC_ASGN_ORIG	Action Activity	CRC_CLOSE_REQ	Assign request back to QC Engineers
6	CRC_SENDREREJECT_QC	Action Activity	CRC_CLOSE_REQ	Send rejection notification to QC Engineers
7	CRC_NOTIFY_CLOSEREQ	Send Email Activity	CRC_CLOSE_REQ	Send close email notification to the originator
8	CRC_NOTIFY_REJECT	Send Email Activity	CRC_REJECT_REQ	Send rejection notification to the originator
9	CRC_CLOSE_REQ	Function Activity	CRC_END_RPROCESS	Close the request
10	CRC_REJECT_REQ	Function Activity		Reject the request
11	CRC_END_RPROCESS			End of Process

[Configure Workflow](#)

< Back Save as Draft **Submit** Cancel

Copyright © 2012 Gulf Aluminium Rolling Mill Co. B.S.C. ©
Powered By GARMCO ICT & PD Department

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.

The screenshot displays the GARMCO Service Management System interface within a Windows Internet Explorer browser window. The page title is "GARMCO Service Management System" and the subtitle is "GULF ALUMINIUM ROLLING MILL CO. B.S.C. ©". The date and time are "Monday, 23 July 2012 15:38:47". The user is logged in as "Ervin" with the position "Software Engineer" and cost center "7600".

The main content area shows a confirmation message: "Your request has been submitted successfully." with a green checkmark icon. Below this, the service request details are listed:

- Service Type: Customer Referral Case
- Category:
- Title: Test CRC Incident Report
- Description: testing
- Status: Request Sent
- Date Submitted: 23-Jul-2012

A red arrow points to the "Service Request No: 436" link. The page also includes a progress bar with three steps: "1 Classify the request", "2 Provide a detailed information about your request", and "3 Summary".

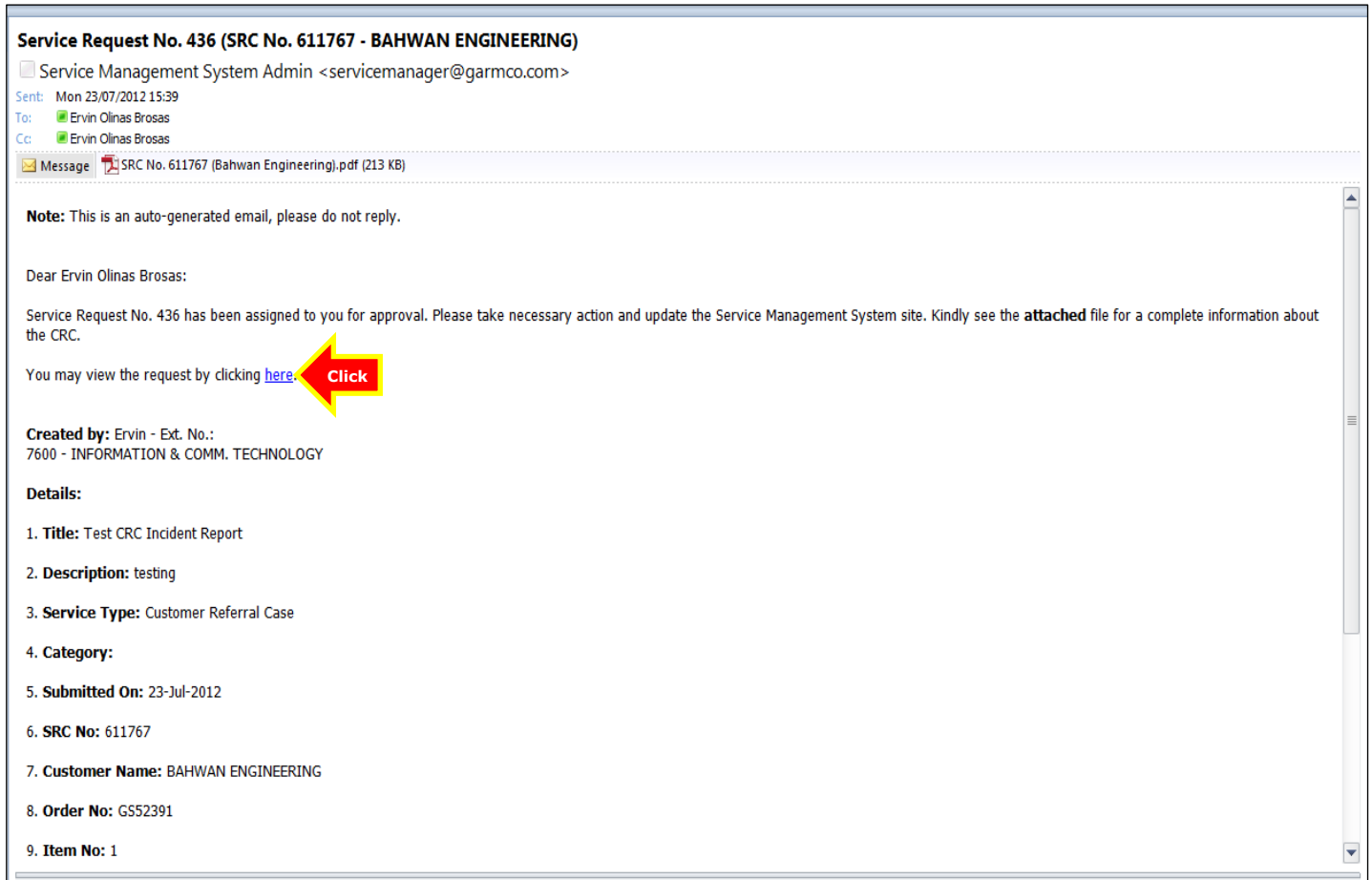
Quick Links:

- Create New Service Request
- View My Service Requests
- View Assigned Service Requests

The footer contains the copyright notice: "Copyright © 2012 Gulf Aluminium Rolling Mill Co. B.S.C. ©" and "Powered By GARMCO ICT & PD Department". The taskbar at the bottom shows various application icons and the system clock.

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:



-
- The screenshot displays the GARMCO Service Management System interface. At the top, the header includes the GARMCO logo, the system name 'GARMCO Service Management System', the user 'GULF ALUMINIUM ROLLING MILL CO. B.S.C. ©', the date 'Monday, 23 July 2012 15:49:46', and navigation links for Home, Services, Reports, Administration, and Help. A sidebar on the right shows a circular diagram of the system's workflow.
- The main content area is titled 'Test CRC Incident Report'. It displays the following details:
- Service Request No: 436
 - Status: Open
 - Priority: Normal
 - Views: 0
- On the right side, additional information is provided:
- Submitted On: 23-Jul-2012 3:38 PM
 - Created By: Ervin - Ext. No. 3152
 - Currently Assigned To: QC Engineer
 - Resolution Time Remaining: 119 hrs, 52 mins
- Below the incident details is a table with columns: Classification, Detailed Description, Attachments, Actions, Approval, Routine History, and Process Workflow Status. The table is currently empty, with a message 'No Approval Found'.
- The 'Basic Information' section provides further details:
- Service Module: Technical / QC
 - Service Type: Customer Referral Case
 - Category:
 - Sub-Category:
 - Description: testing
 - Priority: Normal
 - Current Status: Open - Waiting For Approval
 - Currently Assigned To: QC Engineer
 - Due Date: 28-Jul-2012 3:38 PM
 - Required Action: Approval / Rejection
- The 'More Info' section contains a text area for 'Approver Comments'. A red arrow labeled '1' points to the text area, which contains the text 'okay'. Below the text area are buttons for 'Design', 'HTML', and 'Preview'. A red arrow labeled '2' points to the 'Approve' button.
- At the bottom of the page, the footer states: 'Copyright © 2012 Gulf Aluminium Rolling Mill Co. B.S.C. © Powered By GARMCO ICT & PD Department'.

Page 10

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:

GARMCO Service Management System - Windows Internet Explorer provided by GARMCO

Monday, 23 July 2012 16:05:26

GARMCO GULF ALUMINIUM ROLLING MILL CO. B.S.C. ©

Home Services Reports Administration Help

Test CRC Incident Report
Service Request No: 436
Status: Open
Priority: Normal
Views: 2

Submitted On: 23-Jul-2012 3:38 PM
Created By: Ervin - Ext. No. 3152
Currently Assigned To: QC Engineer
Resolution Time Remaining: 119 hrs, 59 mins

Classification Detailed Description Attachments Actions Approval Routine History Process Workflow Status

No Actions found

Basic Information:

Service Module: Technical / QC
Service Type: Customer Referral Case
Category:
Sub-Category:
Description: testing

Priority: Normal
Current Status: Open - Assigned To Service Provider
Currently Assigned To: QC Engineer
Due Date: 28-Jul-2012 4:04 PM
Required Action: Close Assigned Request

More Info

Available Actions: Add Attachments

Attachments: No attachments found

Upload Files...

Submit Re-assign Reset << Back

Copyright © 2012 Gulf Aluminium Rolling Mill Co. B.S.C. ©
Powered By GARMCO ICT & PD Department

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.

File Attachment Upload

Attachment: **Select** **Submit** << Back

● SRC No. 611767 (Bahwan Engineering).pc
✕ Remove

Remarks: Test Attachment

(Note: You can upload to a maximum of 5Mb per file only.)

- 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.

GARMCO Service Management System - Windows Internet Explorer provided by GARMCO

GARMCO Service Management System Monday, 23 July 2012 16:10:20

GARMCO GULF ALUMINIUM ROLLING MILL CO. B.S.C. ©

Home Services Reports Administration Help

Test CRC Incident Report
Service Request No: 436
Status: **Open**
Priority: **Normal**
Views: 2

Submitted On: 23-Jul-2012 3:38 PM
Created By: **Ervin** - Ext. No. 3152
Currently Assigned To: **QC Engineer**
Resolution Time Remaining: 119 hrs, 54 mins

Classification Detailed Description Attachments Actions Approval Routine History Process Workflow Status

No Actions found

Basic Information:

Service Module: Technical / QC Priority: Normal
Service Type: Customer Referral Case Current Status: Open - Assigned To Service Provider
Category: Currently Assigned To: QC Engineer
Sub-Category: Due Date: 28-Jul-2012 4:04 PM
Description: testing Required Action: Close Assigned Request

[More Info](#)

Available Actions: Add Attachments

Attachments: SRC No. 611767 (Bahwan Engineering)

Upload Files...

Submit Re-assign Reset << Back

Copyright © 2012 Gulf Aluminium Rolling Mill Co. B.S.C. ©
Powered By GARMCO ICT & PD Department

16:10 23/07/2012

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:

GARMCO Service Management System
GULF ALUMINIUM ROLLING MILL CO. B.S.C. ©

Monday, 23 July 2012 16:12:36

Test CRC Incident Report
Service Request No: 436
Status: Open
Priority: Normal
Views: 2

Submitted On: 23-Jul-2012 3:38 PM
Created By: Ervin - Ext. No. 3152
Currently Assigned To: QC Engineer
Resolution Time Remaining: 119 hrs, 54 mins

Classification Detailed Description Attachments Actions Approval Routine History Process Workflow Status

No Actions found

Basic Information:

Service Module: Technical / QC
Service Type: Customer Referral Case
Category:
Sub-Category:
Description: testing

Priority: Normal
Current Status: Open - Assigned To Service Provider
Currently Assigned To: QC Engineer
Due Date: 28-Jul-2012 4:04 PM
Required Action: Close Assigned Request

[More Info](#)

Available Actions: Organize Meeting

Subject	Location	Email Message	Organizer	Attendees	Start Date	Start Time	Duration	Rem
No Meeting Requests Found								

Create Meeting Request...

Submit Re-assign Reset << Back

Copyright © 2012 Gulf Aluminium Rolling Mill Co. B.S.C. ©
Powered By GARMCO ICT & PD Department

- 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.

GARMCO Service Management System
GULF ALUMINIUM ROLLING MILL CO. B.S.C. ©

Monday, 23 July 2012 16:15:10

Home Services Reports Administration Help

Welcome, Ervin
Position: Software Engineer
Cost Center: 7600

Create Meeting Request

1 → Organizer... ervin.brosas@garmco.com

Attendees... hayat.aziz@garmco.com; uly@garmco.com

Subject Customer Referral Case Module Demo

Location ICT Meeting Room

Email Message
Please attend to this meeting.

Start Date 24/7/2012 Start Time 15:00

Duration 30 Minutes Reminder 15 Minutes

3 → Save Reset << Back

2 → [Email Message, Start Date, Start Time, Duration, Reminder]

Copyright © 2012 Gulf Aluminium Rolling Mill Co. B.S.C. ©
Powered By GARMCO ICT & PD Department

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.

GARMCO Service Management System - Windows Internet Explorer provided by GARMCO

GARMCO Service Management System
GULF ALUMINIUM ROLLING MILL CO. B.S.C. ©

Monday, 23 July 2012 16:15:59

Home Services Reports Administration Help

Test CRC Incident Report
Service Request No: 436
Status: Open
Priority: Normal
Views: 2

Submitted On: 23-Jul-2012 3:38 PM
Created By: Ervin - Ext. No. 3152
Currently Assigned To: QC Engineer
Resolution Time Remaining: 119 hrs, 48 mins

Classification Detailed Description Attachments Actions Approval Routine History Process Workflow Status

No Actions found

Basic Information:

Service Module: Technical / QC
Service Type: Customer Referral Case
Category:
Sub-Category:
Description: testing

Priority: Normal
Current Status: Open - Assigned To Service Provider
Currently Assigned To: QC Engineer
Due Date: 28-Jul-2012 4:04 PM
Required Action: Close Assigned Request

[More Info](#)

Available Actions: Organize Meeting

Subject	Location	Email Message	Organizer	Attendees	Start Date	Start Time	Duration	Rem
Customer Referral Case Module Demo	ICT Meeting Room	Please attend to this meeting.	ervin.brosas@garmco.com	hayat.aziz@garmco.com; uly@garmco.com	24-Jul-2012	3:00 PM	30 minutes	15 minutes

Create Meeting Request...

Submit Re-assign Reset << Back

Copyright © 2012 Gulf Aluminium Rolling Mill Co. B.S.C. ©
Powered By GARMCO ICT & PD Department

16:15
23/07/2012

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:

GARMCO Service Management System - Windows Internet Explorer provided by GARMCO

GARMCO Service Management System

GULF ALUMINIUM ROLLING MILL CO. B.S.C. ©

Monday, 23 July 2012 16:21:42

Home Services Reports Administration Help

Test CRC Incident Report

Service Request No: 436
Status: Open
Priority: Normal
Views: 2

Submitted On: 23-Jul-2012 3:38 PM
Created By: Ervin - Ext. No. 3152
Currently Assigned To: QC Engineer
Resolution Time Remaining: 119 hrs, 43 mins

Classification Detailed Description Attachments Actions Approval Routine History Process Workflow Status

No Actions found

Basic Information:

Service Module: Technical / QC
Service Type: Customer Referral Case
Category:
Sub-Category:
Description: testing

Priority: Normal
Current Status: Open - Assigned To Service Provider
Currently Assigned To: QC Engineer
Due Date: 28-Jul-2012 4:04 PM
Required Action: Close Assigned Request

[More Info](#)

Available Actions: Send Email

To... uly@garmco.com

Cc... hayat.aziz@garmco.com

Subject Test Sending Email

Message To All Concerned:
This is just a test email.
Regards,
Admin

Submit Re-assign Reset << Back

Copyright © 2012 Gulf Aluminium Rolling Mill Co. B.S.C. ©
Powered By GARMCO ICT & PD Department

100%

16:21
23/07/2012