

# EPIDESK 2



Working with EPiDesk 2

2.04

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# EPI SERVER

Working with EPiDesk 2.04 Rev A  
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## Introduction

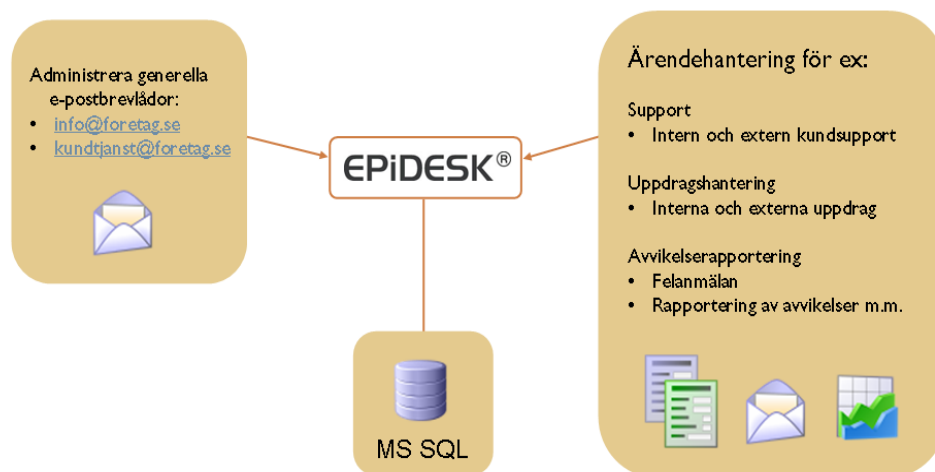
### What is EPiDesk?

EPiDesk is a case management system based on the award-winning EPiServer CMS platform. EPiDesk is easy to install, use and customize for your own requirements. The system is completely web-based, which means no installation is required on local workstations. EPiDesk supports EPiServer CMS 4.61 and does not currently have support EPiServer CMS 5.

### Areas of Use

EPiDesk has many different areas of use, such as support or help desk systems for internal and external support, administration of general e-mail addresses, deviation management, error notification, task management and more. Different areas of use can be combined within the same system.

Examples of usage could include a county's web or e-mail based communication channels to its citizens, or a company's information department which receives tasks, questions and comments from external parties. EPiDesk can also be used as a selling tool by production companies, or as a help desk resource by an IT department.



### How Does EPiDesk Work?

Your customers and employees report to the system via e-mail or form. An incoming case is logged and given a unique ID. The customer automatically receives an e-mail message confirming that the case was received, as well as instructions on how the case can be traced on a built-in extranet. Because all communication regarding a case is stored in the same location, both support personnel and customers have a simple, concise overview of the case management.

The system shows clearly who has responsibility for a case, and where the responsibility currently lies. EPiDesk automatically keeps track of who's "turn" it is, and sends a reminder if a question goes unanswered.

Cases in EPiDesk can be prioritized and categorized according to type and characteristic. The system also has built-in escalation with adjustable response times, which are automatically connected to case priority.

Handlers/operators log in to their personalized view of new and existing cases.

Handlers/operators can reply to customers via e-mail, and attach documents and images when necessary. Cases can also be forwarded to external parties or suppliers. All discussions are threaded and all questions and answers displayed clearly. The system has a powerful search engine which enables personnel to find previous cases; in this way the system can also be used as a knowledge base.

In EPiDesk you can create FAQ articles. Articles can be reused in replies using the “drag and drop” technique. Relevant documents can be uploaded and made accessible to handlers/operators. To aid communication with customers, FAQ articles, news and documents can also be made accessible on the customer's extranet.

## Flexible and Customizable

EPiDesk's flexibility is shown through the possibility to connect to other systems, such as diary, inventory, personnel and monitoring systems. Basic appearance can be customized according to customer requirements, and all templates can be translated into other languages, further developed and altered.

## The Manual Explained

Because EPiDesk has such a broad range of use with many parties acting in different rolls, naming problems can arise. In this manual we've chosen to use the title *operator* when referring to those parties acting as handlers, support personnel, moderators for general e-mail inboxes, etc. An employee, customer or other system user is referred to as a *user*. Administrators are called just that: *administrators*.

The manual is divided into three sections: *Operator interface*, *Administrator interface* and *Extranet for users*. The reason for this is simple: When consulting the manual, it should be easy to locate the section that is relevant for you in whatever roll you have.

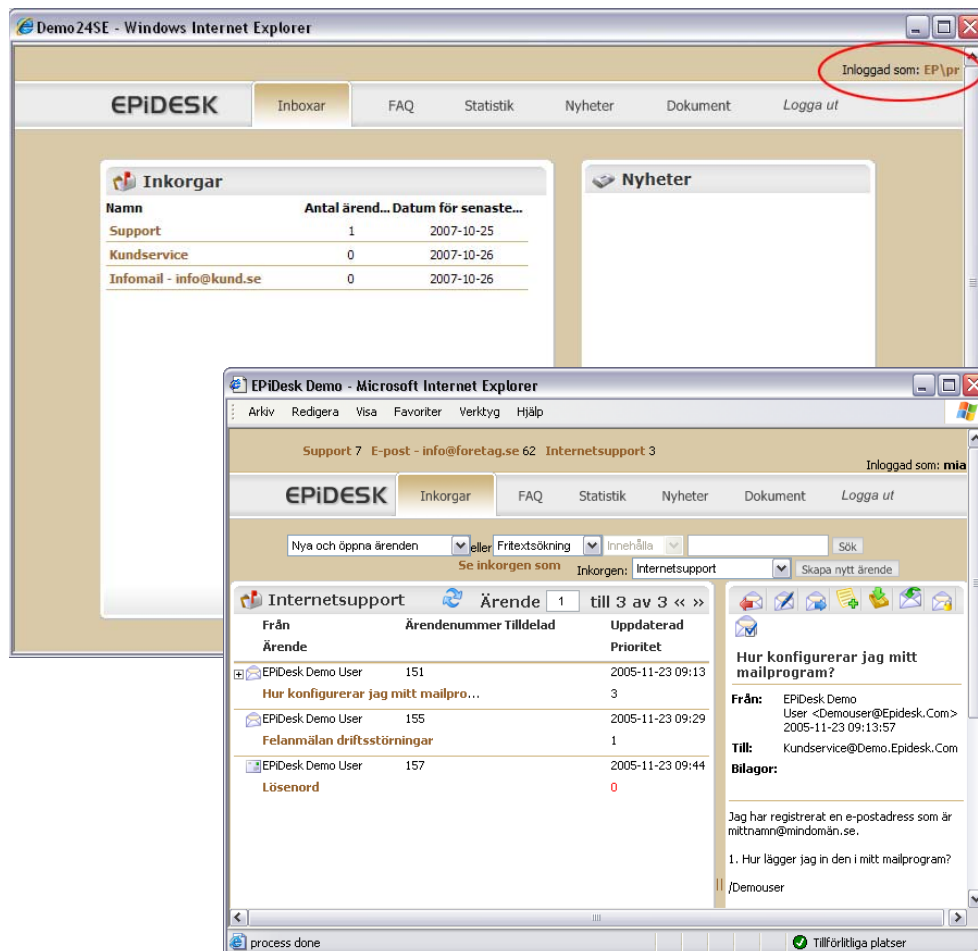
It is also important to be aware that the manual refers to a standard installation of EPiDesk. Keep in mind that a lot of what you read can be customized in different ways to suit your specific operation.

## Important Information

Outgoing e-mails from EPiDesk contain digits, e.g. 1234@domainname.com. This can sometimes be interpreted as spam by certain spam filters and e-mail clients. If this problem occurs with e-mail communication, inform your e-mail administrator - who can define rules in the company's central spam filter - to ensure that e-mail from EPiDesk's domain name is not interpreted as spam. E-mail messages can also end up in an e-mail client's junk mail or spam filter: If this is the case, e-mail client settings can be changed so that messages with EPiDesk's domain name are recognized as coming from a legitimate sender.

## Operator Interface

This section explains the interface shown for those logged in to EPiDesk as operators, handlers and support personnel.



## Login

If EPiDesk is integrated with the network's catalog server, you can use your username and password. EPiDesk has the same authenticity support as EPiServer CMS (see EPiServer CMS Administrator's Manual. It can be downloaded from [www.episerver.se](http://www.episerver.se)). when you log in to EPiDesk for the first time, complete your user information by filling in your first and last names and e-mail address. In this case, the My Settings window is shown.

If EPiDesk is not integrated with the catalog server, you will receive a username and password from the administrator. You may also need to complete your user profile by adding name and e-mail as above.

There are several ways to log in to EPiDesk. Depending on your customization, there may need to click a login symbol or enter a URL in your browser's address bar. In the example below, you enter the Web site address.

1. Open Internet Explorer.
2. Enter the following in the address bar: `http://www.domainname.com/EPiDesk`. Note that this is only an example. The login box is shown:



The image shows the EPiDesk login interface. It features a blue header with the 'EPiDESK' logo. Below the header, there are two input fields: 'Namn' (Name) and 'Lösenord' (Password). A checkbox labeled 'Automatisk påloggning mot den här webbplatsen' (Automatic login to this website) is present. A 'Logga in' (Login) button is located to the right of the password field. At the bottom, there is a link: 'Om du loggar in kommer cookies att användas' (When you log in, cookies will be used).

3. Enter your name and password, and click *Login*

Certain information must be entered in *My Settings* the first time you log in as a new operator.

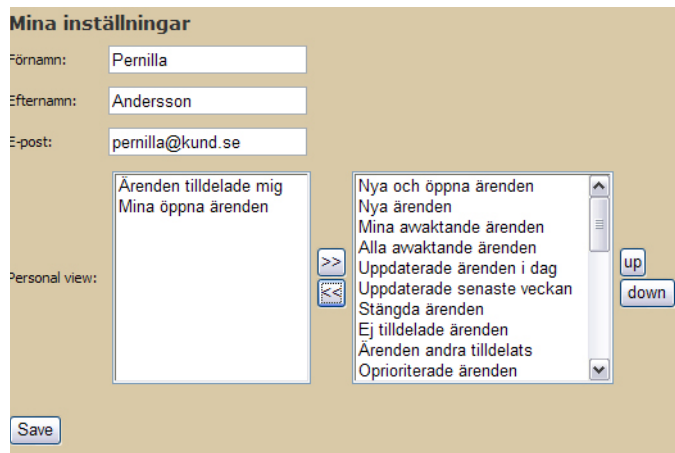
## My Settings

;My Settings is reached by clicking the username in the upper-right corner of the operator's interface.

Fill in your settings so that you receive e-mail messages as an operator.

You can also create a personal view of the listings that you want to be visible to you in the operator interface. All the listings are shown as default.

1. Enter your information.
2. Click *Save*.

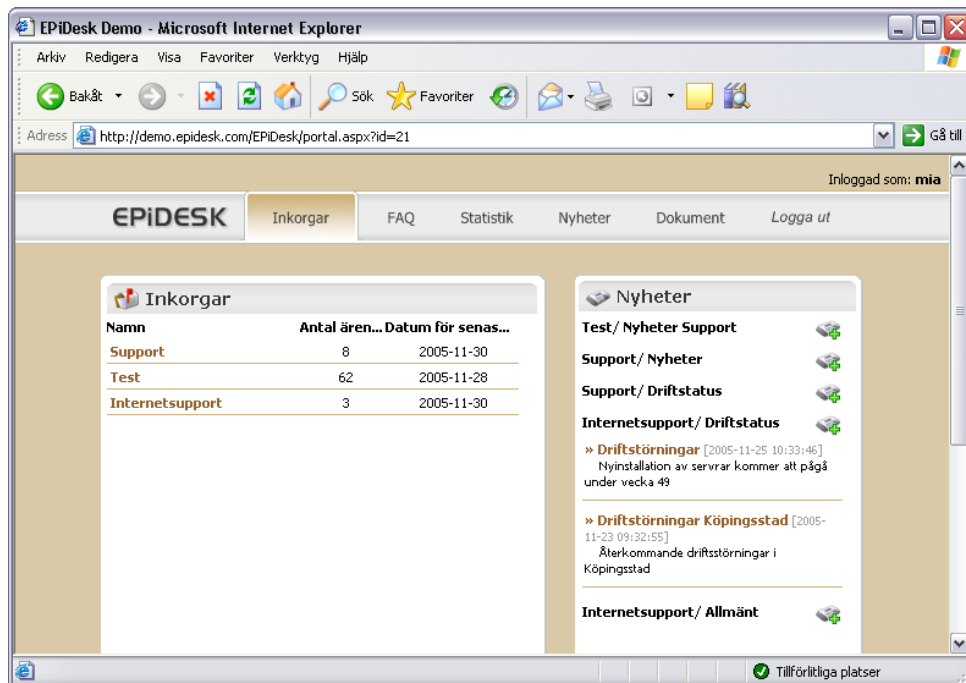


The image shows the 'Mina inställningar' (My Settings) form. It has a tan background. At the top, it says 'Mina inställningar'. Below this, there are three input fields: 'Förnamn:' (First name) with 'Pernilla', 'Efternamn:' (Last name) with 'Andersson', and 'E-post:' (E-mail) with 'pernilla@kund.se'. Below these fields, there is a 'Personal view:' section. It contains a list of items: 'Ärenden tilldelade mig' and 'Mina öppna ärenden'. To the right of this list is a scrollable menu with the following options: 'Nya och öppna ärenden', 'Nya ärenden', 'Mina awaktande ärenden', 'Alla awaktande ärenden', 'Uppdaterade ärenden i dag', 'Uppdaterade senaste veckan', 'Stängda ärenden', 'Ej tilldelade ärenden', 'Ärenden andra tilldelats', and 'Oprioriterade ärenden'. There are 'up' and 'down' buttons next to the scrollable menu. At the bottom left, there is a 'Save' button.



## Home

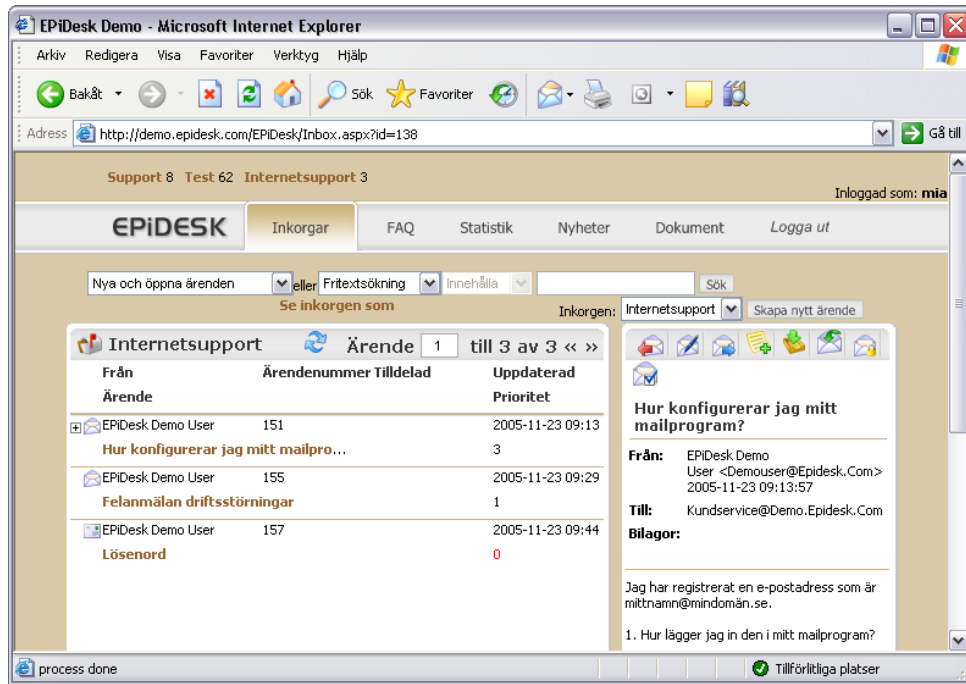
The home page shows the inboxes which have previously been created. To create new inboxes you must be in Admin mode (read more in the section *Managing Inboxes* on p. 37). The home page can be customized to show a certain number of news, events, etc. for respective inboxes. Click the inbox name once to open it.



## Inbox

Every inbox has a unique name and is a container for those cases that come to the inbox's e-mail address. A case can be created in several ways. The most common is when a user sends an e-mail, which then becomes a case. Users can also fill out a form on an extranet. Cases can also be created in operator interface.

For every new case that comes to the inbox, an auto-reply is sent back to the sender's e-mail address, containing the case number (Case ID) and standard reply text, "your message has been received, etc.". The text entered in the auto-reply is decided by the administrator (see section *For administrators - Inbox settings* on p. 38).



## Symbols in the View

Depending on a case's status, different symbols are shown to the left of the subject line.



### **New case**

A case has *New case* status when it has newly come to an inbox and no actions have been performed on it.



### **Opened case**

A case receives *Open* status once it has been replied to or forwarded. If an operator changes its priority, the case is also considered opened.



### **Pending case**

A case has *Pending* status as long as it is waiting for a user to reply - in other words, whenever it is the user's "turn".

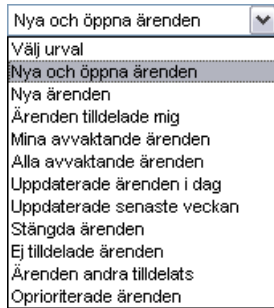


### **Closed case**

A case receives *Closed case* status when it is closed by a user or operator.

## Select View

The default view is *New and opened cases*. You can change view selections depending on the type of cases you want to show. Click the drop-down arrow beside the view option and select from the list.

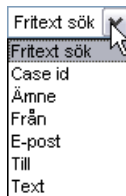


## Search

An easy way to find a specific case is by using the search feature.

### Start search

1. Select *Search query*



2. Enter a word in the search box and click *Search*  
When the search has filtered out one or more cases, the *Select view* option is shown.

Or:

1. Select the *Subject* option (search the subject line of all cases in the current view selection).
2. Select *Equal* or *Contains*. Next, enter the search text and click *Search*.  
When the search has filtered out one or more cases, the *Select view* option is shown.

### Restore search

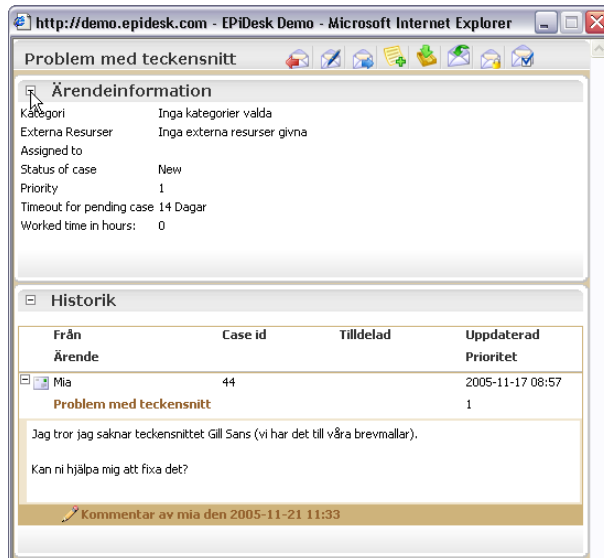
To restore the search, click the drop-down arrow to the right of the view option, and select *New and open cases*.

## Manage Incoming Cases

### Opening or showing a case

To open or show a case, do the following:

1. Click the subject line to show it in the right-hand window, or double-click to open it in a separate window.



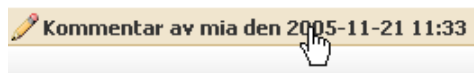
2. Click the plus/minus signs to expand or minimize case information, history, etc.

### Opening or Showing Replies, Comments and Forwarding.

If a case has been forwarded, replied to or had comments added, you can click the plus sign to the left of it to expand and view this information also. When a case is expanded, you can close the information by clicking the minus sign.

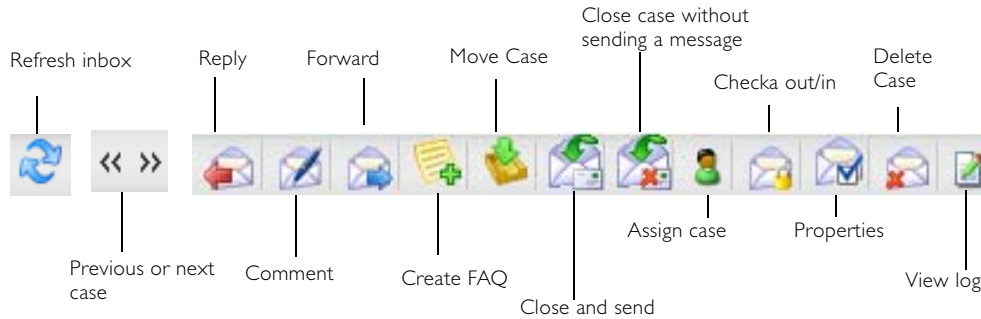


When you open a case in a separate window, you can view and read comments and replies at the bottom of the window. Click the various lines to show comments, etc.



## The Toolbar

The toolbar with all case management buttons is shown both on the right-hand side of the inbox window, and when you open a case in a separate window. See figure below for the button names:

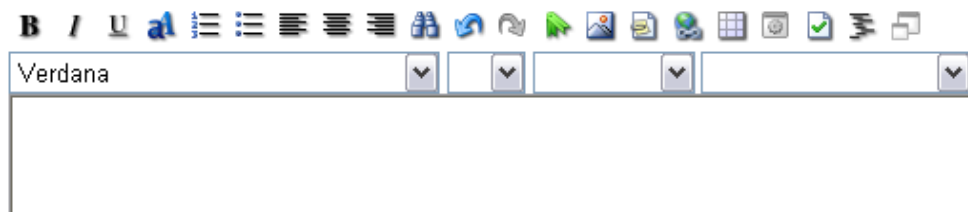


Reopen the case. The button is only shown when the case is closed.






















## The Editor

When you choose to reply, forward or write comments, this is done in the editor of the that window. In the editor you can enter text content, attach images, create tables, etc. Consider it a mini “word processor”. (For more detailed information on how the editor works, see the Editor’s manual for EPiServer CMS. It can be downloaded from [www.episerver.se](http://www.episerver.se)) The following is a brief explanation of how to use the editor:


The buttons available in the editor’s default settings are shown below. The system administrator has the right to decide which buttons will be shown. For this reason you may have access to either more or less buttons than are shown here.




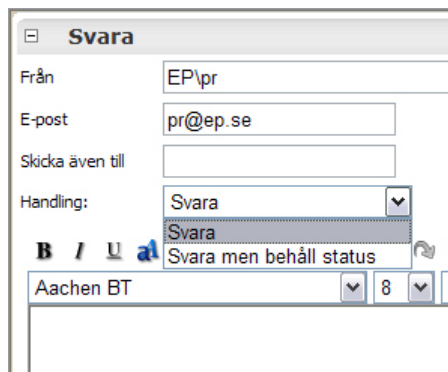
**Explanation of the Different Buttons in the Editor:**

 Bold	 Italics	 Underline
 Font	 Numbered list	 Bulleted list
 Align Left	 Center	 Align Right
 Search	 Undo	 Redo
 Insert bookmark	 Insert image from file	 Insert document
 Insert hyperlink	 Insert table	 EPiServer Fields...
 Spelling	 Show/Hide HTML code	 Maximize/restore Editor

**Reply**

1. Select a case (if the case is already opened in a separate window, click Reply directly).
2. Click Reply .
3. Enter your reply in the body section. The history is shown in the lower window.
4. You can reply to a case in two ways. Choose your alternative under *Action*.
  - a. Select *Reply*. The case status will be changed to *Pending* when you reply.
  - b. Select *Answer but keep status* if you want to send a reply, but keep the case status. This alternative may be preferred if you, for example, want to inform the customer of something, but want to keep working with the case.
5. Click *Save*.

Note! A case is checked out automatically when you click Reply . When you send a reply, you will be asked whether you want to check in the case. Answer "No" to keep the case checked out. Note that EPiDesk measures the time that a case is checked out. See *Case Work Time*.



**FAQ article in reply or comment:**

When you create a comment in a case, you also have the possibility to copy in an article from an existing FAQ. The available FAQ categories are shown on the right-hand side of the window.

### FAQ artiklar


- Teckensnitt**
- Installera teckensnitt**

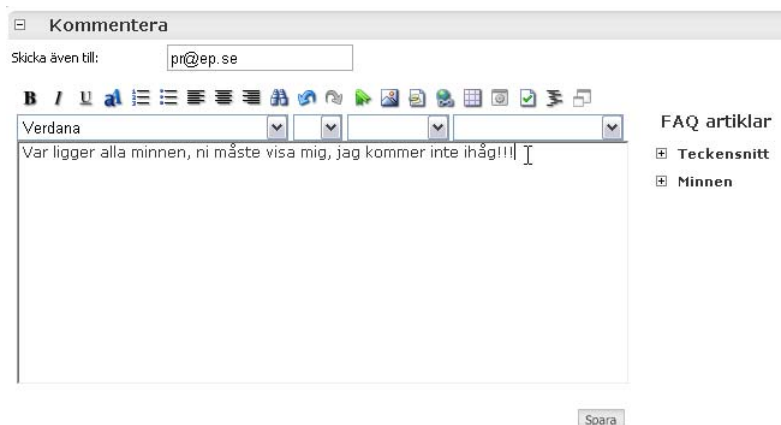
1. Expand by clicking the *plus sign*.

Point to the article (the mouse pointer changes appearance) and drag it to the comments box.


### Commenting

Comments are internal and can only be opened/read by an operator.

1. Select a case (if the case is already opened in a separate window, click Comment directly).
2. Click *Comment* .
3. Enter an e-mail address in the field *Send also to* - if you want the comment to be sent to someone.
4. Enter a comment and click *Save*.



### Forwarding

1. Select a case (if the case is already opened in a separate window, click Forward directly).
2. Click *Forward* .




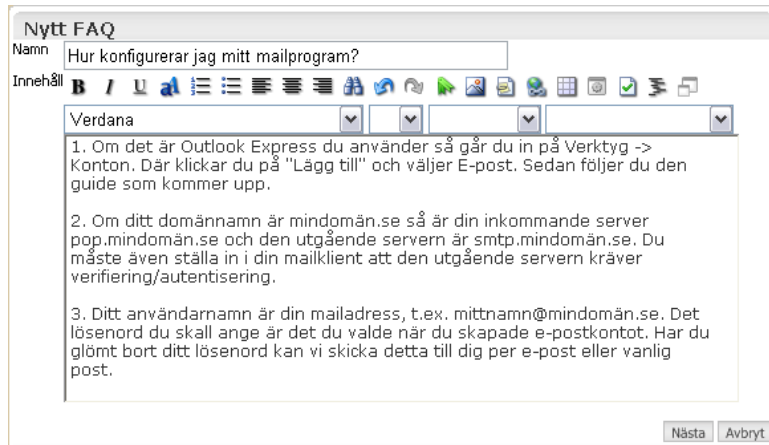
3. Click *Yes* if you want to forward the entire case thread. Click *No* if you do not want to forward the entire case thread.
4. Enter the e-mail address to you want to forward the case to.
5. You can enter an e-mail address in the *Send also to* field.
6. Enter additional text in the body section, and click *Send*.

**Tip** When an operator creates new cases in EPiDesk, it's possible to fill in the *External resource* field (an e-mail address) in advance. This way, when the operator later chooses to forward a case, the e-mail address is already filled in.

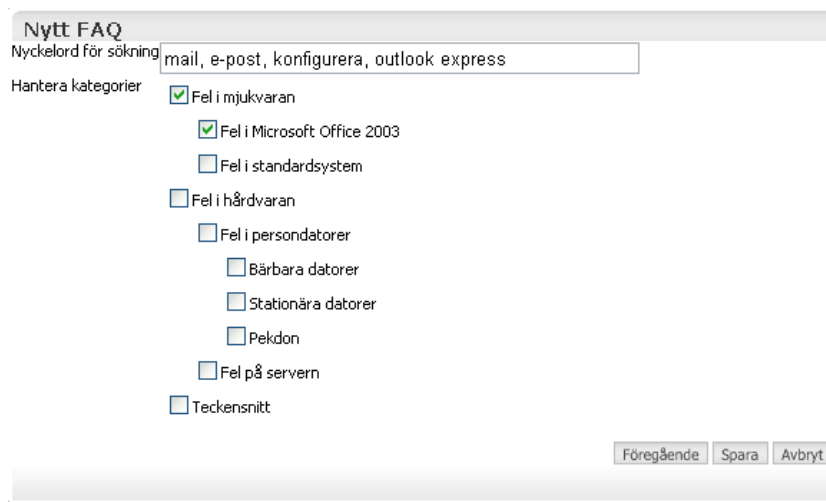
### Create FAQs

To create a FAQ article from a case, do the following:

1. Select the case from which you want to create a comment.
2. Click *Create FAQ* .
3. Select a subject, or click *New*. Click *Next*.



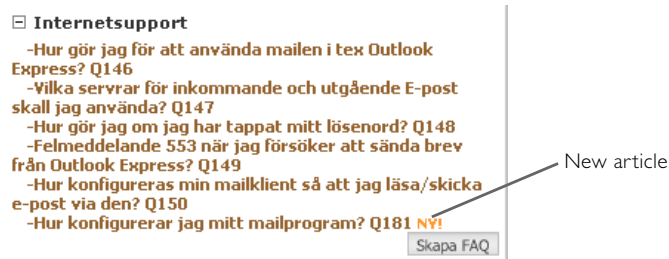
4. Edit and enter new, relevant text in the editor.
5. Click *Next*.



6. Enter a keyword in the *Search keywords* field.
7. Select one or more *categories*.
8. Click *Save*.


The article is now added to the FAQ Articles box on the right. All new articles are marked on the right with *NEW!*.

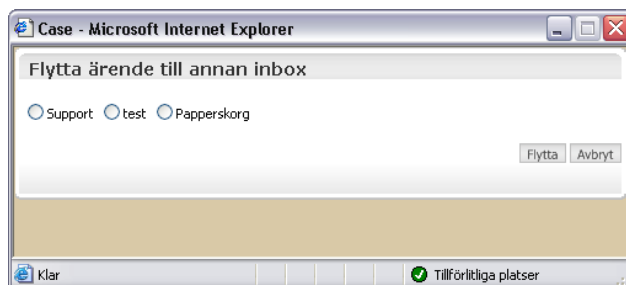




## Moving a case

Use the Move case button when you want to move a case from one inbox to another. Do the following:

1. Select a case.
2. Click *Move case* .





3. Select the inbox you want to move the case to.
4. Click *Move*.

## Closing a case

When a case is finished it has Closed status. The advantage to closing as opposed to deleting is that you retain the possibility for follow-up and statistical use of closed cases. If you delete a case there are no follow-up possibilities.

You can close a case in two ways.


1. Highlight a case.
2. Select a method to close the case.
  - a.) Click *Close case and send standard notification*.  An automatically generated e-mail is sent to the e-mail address that reported the case informing them that the case has been closed. (This message can be configured EPIDesk's administrator's interface).
  - b.) Click *Close case without sending any mail*.  A message will not be sent when the case is closed.




3. A confirmation dialog box appears. Click *OK*.

### Check in/out a case

Use Check out when you want to make sure that only you are working on that case. Additional operators now won't be able to reply, comment, etc., on this case. When you are finished with the case, check in again. An operator who checks out of a case is the only one who can check in to that case again.

1. Select the case.
2. Click *Check out* .
3. When you are finished with the case, click *Check in*.
4. A confirmation dialog box. Check in the case by clicking *OK*.




A case is automatically checked out when you click *Reply* . When you send a reply, you will be asked whether you want to check in the case again.

Note that EPiDesk measures the time that a case is checked out. See *Case Work Time*.

### Settings - Properties

By default, incoming cases are not prioritized. They are not assigned to a specific recipient or categorized. You have the possibility to automate case management by setting priority levels and assigning cases to specific recipients. You can also enter the amount of time a case may be open, and report how much time has been spent on it.

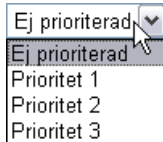
1. Select a case (if the case is already opened in a separate window, click *Properties* directly).
2. Click *Properties* . The *Case Properties* window opens.

*External resources* is the field where you can enter an e-mail address in advance. This way, when you forward a case, the address bar already contains the e-mail address.

*Assigned to* is the list box where you can choose which operator (support personnel) the case will be assigned to. The operator receives automatic e-mail notification that she has been assigned the case.

The *Status* field has the default value *New* when a case is incoming. Status is changed depending on the actions performed on the case. For example, when you reply to an incoming case with *New* status, its status is automatically changed to *Pending*. When you close a case, its status is changed to *Closed*.

*Priority* can be connected to rules for response times, which manage times, reminders and escalation of case priority when the various times are exceeded (see section *Inbox settings* on p. 38).



Note If response times are set for the different levels in Admin mode, it is only possible to reply to incoming cases when the priority level is selected. If no response times are connected to an inbox, an operator does not need to set case priority - it can already be replied to.

*Pending timeout* indicates when a case will be closed automatically. The default value is set by the administrator of that inbox (see section *Inbox Settings* on p. 38). You can personally change the preset value for specific cases.

*Worked time* has a default value of (0) hours. You can add the amount of hours already used in managing the case.

## Case Work Time

Case work time allows you to see and change the total time that has been spent on a case. The time is measured in hours and indicates the difference between the case check out and check in. The time is displayed in hours and minutes (HH:MM) and can be adjusted manually by either replacing or adding/deleting an amount of time to/from a case.

### Replaced time

You can replace the automatically measured time with a new time.

1. Enter a new value in the *Case work time HH:MM* field. 30 minutes is, for example, entered as 00:30.
2. Confirm the change by clicking *Save*.

Note that the new time replaces the previous value.

### Adjust the time

You can also adjust the total time for the case by adding or removing time.

1. Adjust the total time by using the plus or minus key in the *Case work time HH:MM* field. If, for example, you want to add one hour and 15 minutes, enter +01:15. If you want to remove an hour, enter -00:60.  
Confirm the change by clicking *Save*.

All changes are logged in the activity log for the case.

## View Log

The activity log shows the case events in chronological order. Information stored here is, for example, the type of event, the person that initiated the event and when.

Date	EpideskUser	Message	CaseItemID
10/24/2007 9:09:26 AM	LABAN\epideskuser	new case from:Support <38@dev.epidesk.com>	38
10/24/2007 9:09:26 AM	LABAN\epideskuser	Autoreply sent, to:per.rask@episerver.com, from:Su	38
10/24/2007 9:13:18 AM	EP\pr	Case checked out	38
10/24/2007 9:14:11 AM	EP\pr	send reply	39
10/24/2007 9:14:11 AM	EP\pr	keep status	39
10/24/2007 9:14:15 AM	EP\pr	Case checked in	38
10/24/2007 9:14:28 AM	EP\pr	Case checked out	38
10/24/2007 9:15:06 AM	EP\pr	send reply	40
10/24/2007 9:15:07 AM	EP\pr	Case checked in	38
10/24/2007 9:15:59 AM	LABAN\epideskuser	got reply from customer	41
10/24/2007 9:16:28 AM	EP\pr	case assigned to EP\pr	38
10/24/2007 9:17:11 AM	Per Rask (EP\pr)	case assigned to EP\ruwen	38
10/24/2007 9:17:22 AM	Per Rask (EP\pr)	case assigned to Per Rask (EP\pr)	38
10/24/2007 9:17:22 AM	Per Rask (EP\pr)	reassign notification sent to pr@ep.se	38

## Creating a New Case

A case can be created in EPiDesk in an inbox. (A case can also be created by users via the extranet.)

1. Select inbox.
2. Click *Create New Case* at the far right of the window.

**Ärendesinformation**

Kategori **Inga kategorier valda**

Externa resurser

Prioritet **Ej prioriterad**

Avvaktande tid **21 Dagar**

---

**Meddelande**

Från

E-post

Ämne

Verdana

Han vill att vi tittar på skärmens upplösning, upplever att det flimrar

3. *Case Information:*  
Fill in the *External resource* field, *Priority* and select a time for *Pending timeout*. The default value is 14 days if nothing else has been entered. Changes are made in Admin mode (see section *Inbox Settings* on p. 38).
4. *Message:*  
The *From* field is filled in with the operator's name.
5. In the *E-mail* field, enter the user's e-mail address. Note that it is necessary to enter the user's e-mail address in order to create an account for the user and send an auto-reply. The auto-reply message contains a password connected to the user's account, as well as a case ID number.
6. Enter a caption on the *Subject* line.
7. Enter message text in the editor, then click *Create*.
8. The case is added to the inbox along with the other received cases, and an auto-reply is sent to the user.

## Notification of Incoming Cases

When an operator is logged in to EPiDesk and an inbox open, it's easy to select a view (e.g. new cases). When an operator changes case settings and chooses to assign a case to another person, that person receives an e-mail stating that he has been assigned a case. In order to avoid having to watch over an inbox, a notification box is shown at the bottom right of the monitor. In order for notification to work, an operator must be logged in to EPiDesk (this still works when the program is minimized).

### The notification box

The notification box shows a number. This number is based on the amount of new actions that have been performed in this inbox. Click the link to go to the inbox.

The notification registers actions which have been performed on the server since the operator last viewed or refreshed the inbox. Possible actions could include a reply being sent to a case, a reply incoming from a user, a change in priority level or simply a new incoming case.

## Inbox Management

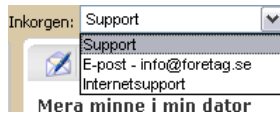
In EPiDesk there are many ways to provide the best possible support. An example could be when a user contacts support and explains that he cannot view cases on the extranet. The operator can easily view the inbox in the same way as the user, and, in this way, better assist the user. As an operator you must be able to switch effectively between different inboxes.



### Switching inbox

To switch inboxes, do the following:

1. Click the drop-down arrow beside the *Inbox* list box.



2. Select an inbox from the list.

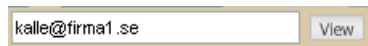
### View inbox as

To get the same view of the inbox as the user, do the following:

1. Select an inbox from the list.



2. Click *View inbox as* **Se inkorgen som** .

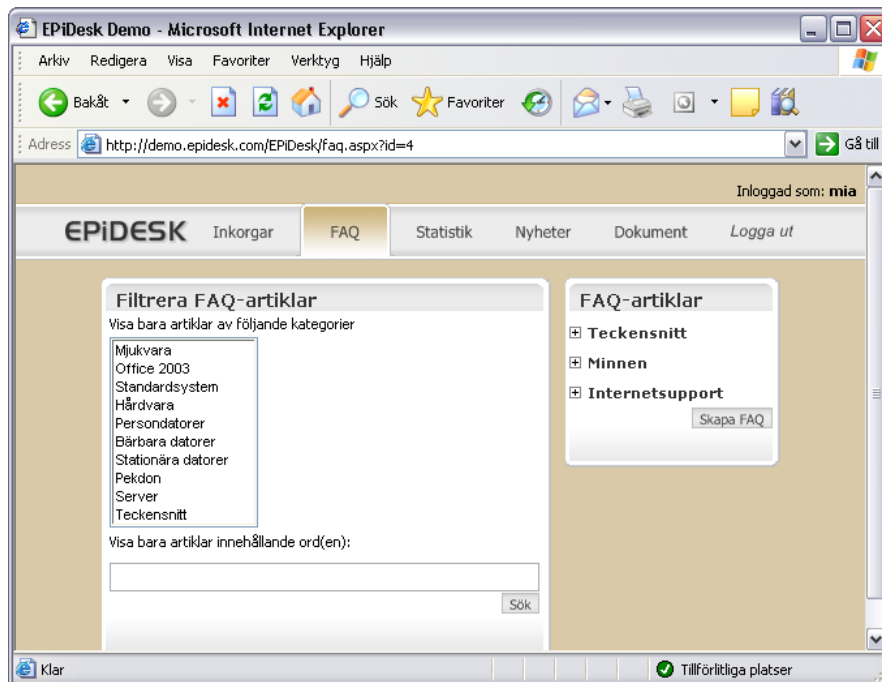


3. Enter the user's e-mail address (username).
4. Click *View*.

The inbox is now shown as the user views it.

## FAQs

Click the *FAQ* tab on the main menu. You can access FAQs in several ways. When you reply to a case you can simply select a folder and an FAQ which you then drag into the body section (editor) to use as a reply. When creating an FAQ you can decide whether it will be public or restricted to fewer users. Public FAQs can be accessed and used from locations such as the extranet. If you choose to restrict it, only operators and administrators have access to that FAQ article. You can also create FAQs when viewing an inbox.




Here, you can create a new FAQ or search in existing articles. You can also select a category first and search within it, or enter one or more search words before starting your search.

## Reading an FAQ


In the FAQ Articles box in the right-hand box, click the plus sign (+) beside a category to expand it and read more.



## Creating an FAQ

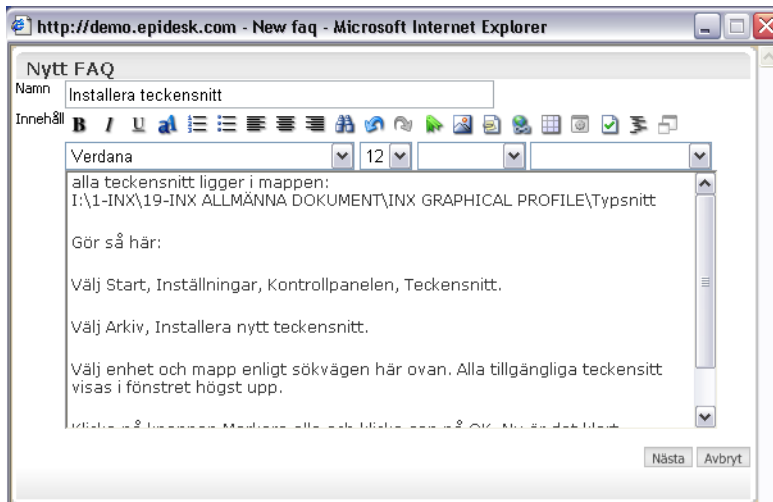
An FAQ can be created in several ways. It can be done from the main menu FAQ or in the inbox view with the *Create FAQ* button . A FAQ article can also be created from inside a case.

1. Option 1. Select FAQ from the main menu, and click *Create FAQ*.

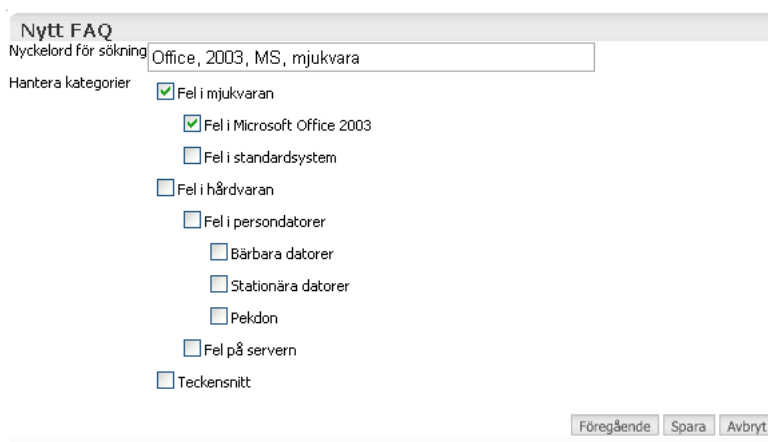
- Option 2. Select Inbox from the main menu, and click *Create FAQ*  in the toolbar of the right-hand box. Then, click *Create FAQ*.



- Select either an existing *subject* or *New*. If you select *New*, you are required to enter a new “folder name” where the article will be stored (the folder name becomes a subject. The figure above shows the Font, Memory and Internet support folders).
- Click *Next*.



- Enter a *Name* for the article (caption).
- Enter the article contents.
- Click *Next*.



- Fill in the *Search keywords* field. You can use a number of keywords and separate them with a comma (,).
- Select one or more categories, and click *Save*.



**Tip** To edit or add new categories you must be in Admin mode. In Admin mode, click *Manage Categories* (read more about categories on p. 48).

## Editing an FAQ Article

1. If you are authorized to edit, click the *Edit* icon.
2. Follow the steps in the instructions above to create an article.
3. Don't forget to click *Save* when you're finished.



## Deleting an FAQ Article

1. If you are authorized to delete, click the *Edit* icon.
2. Click *Delete*.

## Filtering FAQ Articles

1. In the left-hand box, *Filter FAQ Articles*, click a category in the list.
2. You can also enter one or more search words in the search field.
3. Then, click *Search.Statistics*

EpiDesk contains a built-in statistics feature. You can easily choose to view statistics on the number of incoming and outgoing cases per day, most active customers/users, etc.

The powerful statistics engine can filter categories, for example, which are then displayed graphically. You can combine several filters in various report settings. Graphic displays can be in the form of line charts, column charts and others.

## Reporting Service

To create statistics reports from one or more inboxes, do the following:

Click the *Statistics* tab on the main menu bar.

The screenshot shows two side-by-side panels. The left panel, titled 'Meny', lists various menu items under 'Inboxar' (Inboxes), 'Statistikrapporter' (Statistics Reports), and 'Sparade diagram' (Saved Diagrams). The right panel, titled 'Statistik', displays statistics for three categories: 'Support', 'test', and 'Internetsupport'. Each category shows 'Mest aktiva senaste 30 Dagar' (Most active in the last 30 days) and a table with columns for 'Namn' (Name) and 'Antal' (Count).

Support	
Namn	Antal
jb@ep.se	3
mia.scholz@inexor.se	3
mia.göthenby@inexor.se	2
demouser@epidesk.com	1

test	
Namn	Antal
jb@ep.se	61
demouser@epidesk.com	1

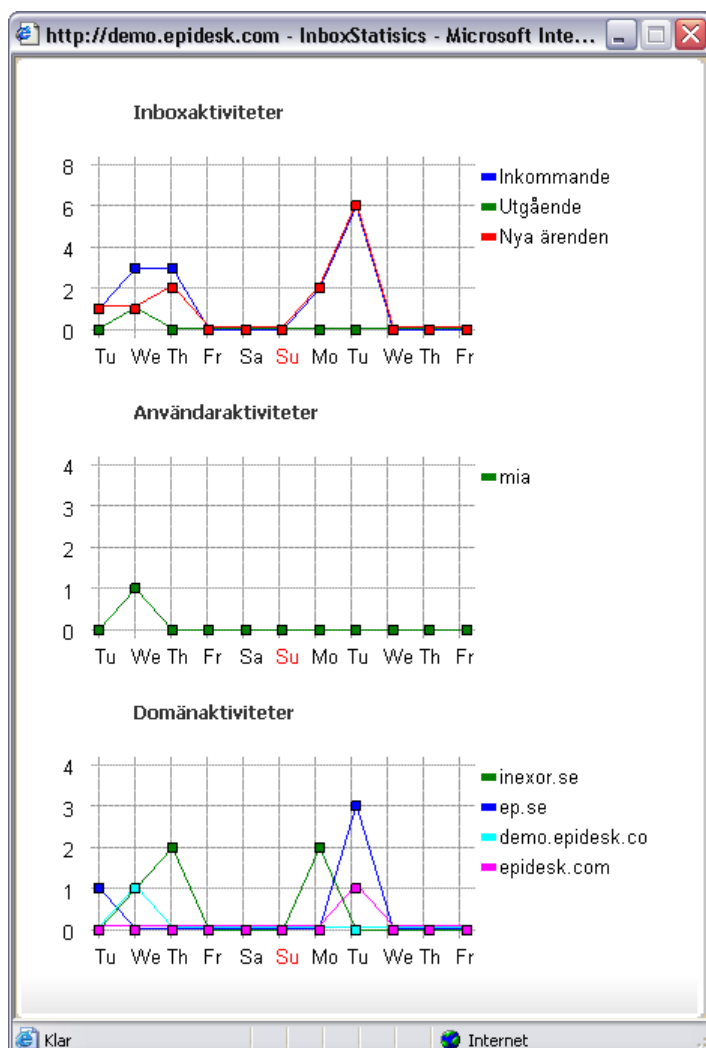
  

Internetsupport	
Namn	Antal
demouser@epidesk.com	4
pr@ep.se	1

## Graphic statistics

The menu on the left shows the accessible inboxes.

Click an inbox to show graphic statistics for user inbox activity, as well as for incoming, outgoing and new cases for that inbox. You can also view statistics and compare activity between different domains.



### Statistics report

1. Click *Create Statistics Report* in the left-hand menu.
2. The *Get Statistic* window opens, in which you can select one or more inboxes and add selections and filters.

The screenshot shows a web interface titled "Statistik" with a sub-section "Skapa filter" (Create filter). It is divided into several sections:

- Välj inkorgar att samla statistik ifrån** (Select inboxes to collect statistics from): A row of checkboxes for "Alla inkorgar" (checked), "Internetsupport", "E-post - info@foretag.se", and "Support".
- Skapa filter för egenskaper** (Create filter for properties): Two dropdown menus, the first showing "-Välj egenskap-" and the second showing "-Välj jämförelse-". To the right is a checked checkbox "Måste finnas" (Must exist).
- Filter för kategorier** (Filter for categories): A list box containing "Mjukvara", "Office 2003", "Standardsystem", "Hårdvara", "Persondatorer", "Bärbara datorer", "Stationära datorer", "Pekdon", "Server", and "Teckensnitt". To the right is a checked checkbox "Måste finnas".
- Lägg till filterval** (Add filter selection): A button.
- Nuvarande filter** (Current filter): A row of tabs labeled "Egenskap", "Jämförelse", "Värde", and "Måste finnas".
- Hämta matchande ärenden** (Fetch matching cases): A button.
- Spara urval som** (Save selection as): A button followed by an empty text input field.

The figure below shows an example of how to make a selection from an inbox. It can be described in four steps:

*Step 1*

Select inbox and properties, then save as a selection.

*Step 2*

Add filter selections. If you want several filters, make several selections and add them.

*Step 3*

Fetch matching cases based on the selections above. The graphic display will be based on these cases.

*Step 4*

Choose how it will be displayed. Display chart. You have the option of saving both the selections and the graphic display. Keep in mind that if you save a selection and use it later, new information will be shown. On the other hand, if you save a chart image it won't be updated the next time you view it.

**Statistik**  
**Skapa filter**

Välj inkorgar att samla statistik ifrån  
 Alla inkorgar  Internetsupport  E-post - info@foretag.se  Support

**Filter för kategorier**

- Mjukvara
- Office 2003
- Standardsystem
- Hårdvara
- Persondatorer
- Bärbara datorer
- Stationära datorer
- Pekdon
- Server
- Teckensnitt  Måste finnas

**Skapa filter för egenskaper**  
 -Välj egenskap-  -Välj jämförelse-  1  Måste finnas

Lägg till filterval

---

**Nuvarande filter**

Egenskap	Jämförelse	Värde	Måste finnas	
Prioritet	Lika	1	Sant	Ta bort

Hämta matchande ärenden

**Matchande ärenden:**  
 test case  
 konto!  
 Dåligt fungerande isskrapal Test  
 Problem med teckensnitt  
 Felanmälan driftsstörningar

---

**Se resultat i diagram**  
 Kolumn  baserat på egenskap  Prioritet

Visa diagram

Example:

1. Select *All inboxes*.
2. Create filter for properties: Choose *property- Priority*. Choose *comparison- Equal*. Enter number *1* (priority 1).
3. After selecting, click *Add Filter Selections*. You can continue to add more selections. Click *Add Filter Selections* after each selection.
4. Click *Fetch Matching Cases*. The cases are now listed at the bottom of the window.

## Graphics

The section above describes how to select Statistics from the main menu, and how to make selections to produce reports on a certain type of case. To move on to displaying reports graphically, do the following:

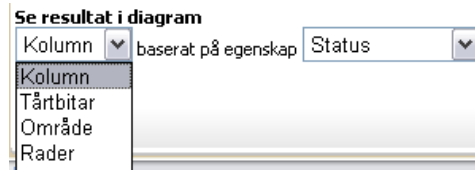
1. Make sure that you have followed the steps in the preceding example.
2. You should be in the *Get Statistics* window, after having made your selections.
3. At the bottom of the window is the "View result in chart" section (see figure below).
- 4.

**Se resultat i diagram**

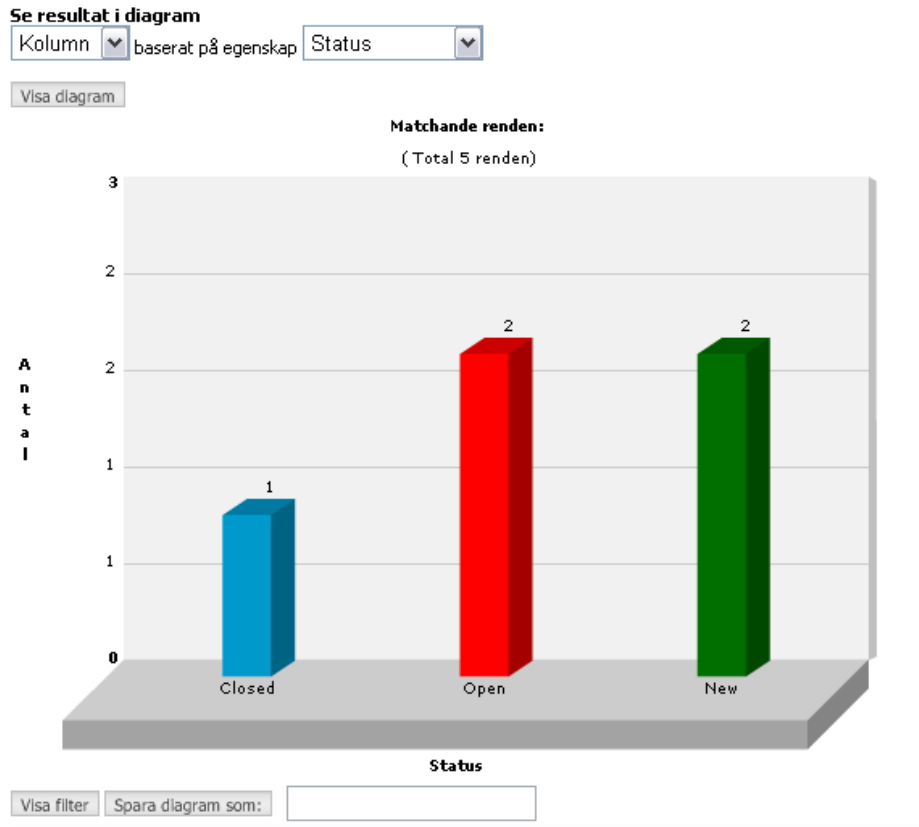
Kolumn  baserat på egenskap  Prioritet

Visa diagram

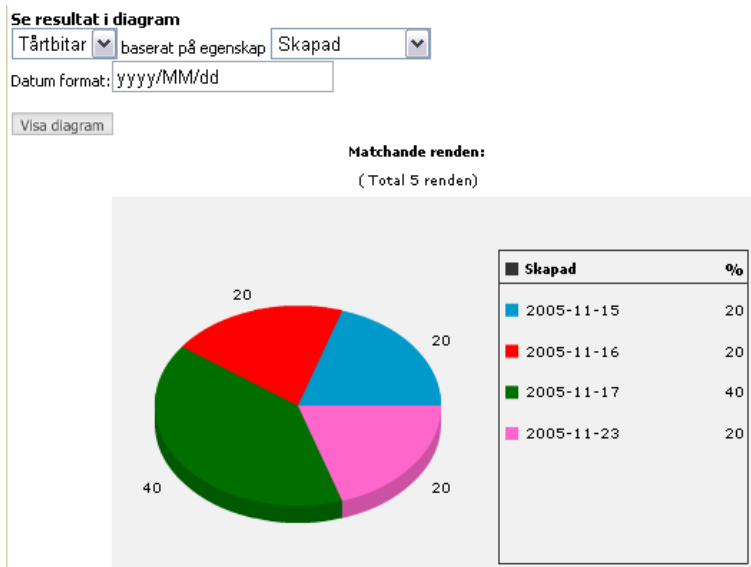
5. Here, you choose which type of chart you want to display. You also choose to base the chart on a property.



- Then, click *Display chart*.



- You can save your chart by entering a name and clicking *Save chart as*.
- To view selections again, click *Show filter*.
- You can select another type of chart based on a different property, and click *Display chart* again.

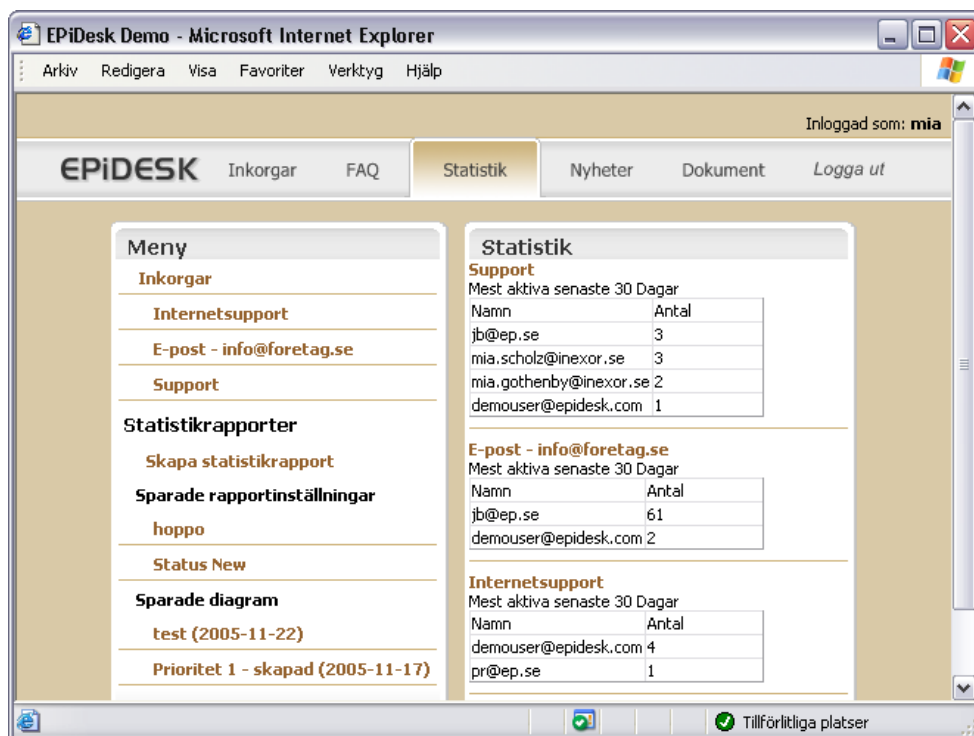


**Tip** To easily switch between the different selections, click the *Show filter* and *Display chart* buttons in the different windows.

### Showing saved charts

To show a saved chart, do the following:

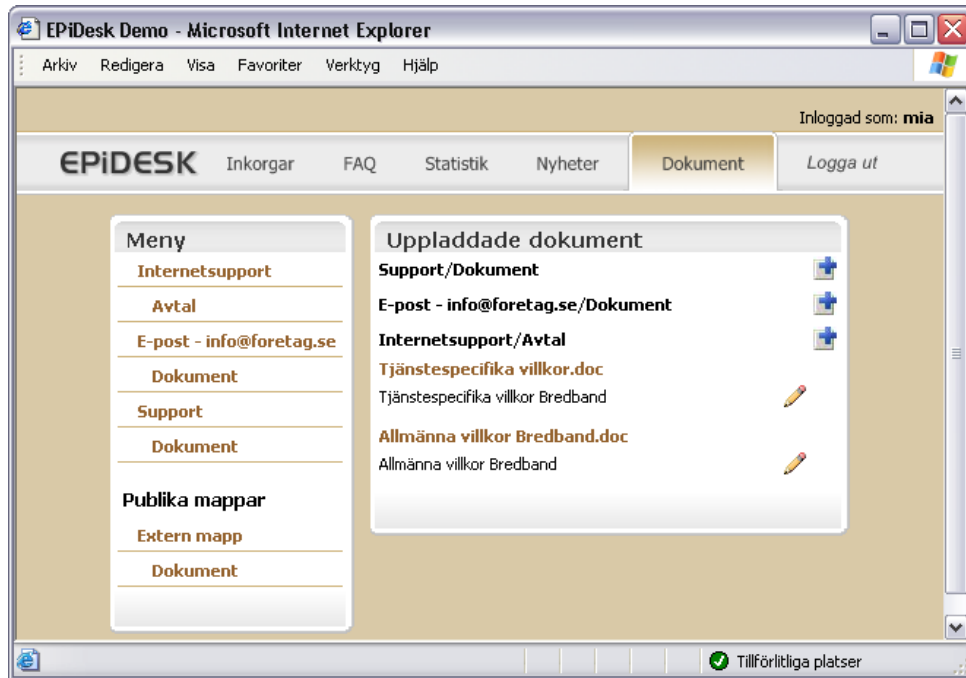
1. Click the *Statistics* tab on the main menu.
2. On the left-hand menu under the *Saved charts* heading is a list of all saved charts. Click the saved chart you want to show.



## Documents

Click the *Documents* tab on the main menu.

An inbox can contain the documents related to it. You can also choose to store documents in public folders. The documents that you upload to a public folder are the documents that can be read and used from the extranet.



## Opening Documents

1. In the left-hand menu, click *Documents* under the inbox name or *Documents* under the External folder heading. Uploaded documents are now shown in the *Uploaded Documents* box.




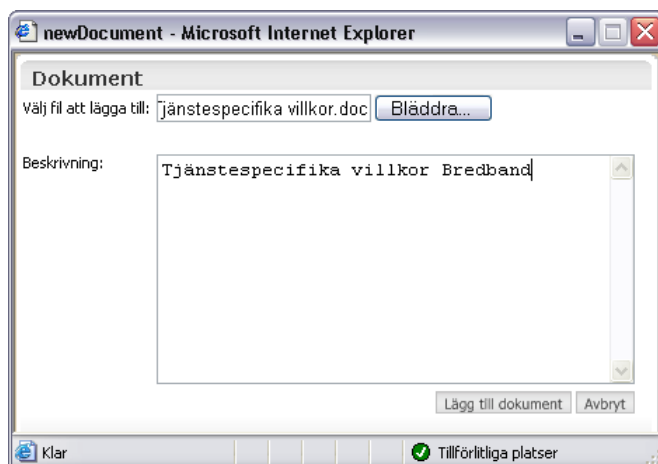
2. Click the document you want to open.



3. Click *Open* to open it in the same window, or click *Save* first.

## Uploading Documents


1. Select *Documents* under the inbox or external folder to which you want to upload a document.
2. Click *Upload document* at the right, to open a window for uploading. 



3. Click *Browse*.
4. Select a document, and click *Open*.
5. Fill in the *Description* field. The information entered in this field is shown under the file name in the document list when you click main menu *Documents* (see example below).
6. Click *Add Document*.

**Tjänstespecifika villkor.doc**  
Tjänstespecifika villkor Bredband 


## Editing a Document

1. Select the document you want to edit. If you are authorized to edit, the *Edit*  symbol is shown at the bottom right, following the document's description.
2. Click the *Edit* symbol.
3. Edit and make necessary changes.



4. Click *Update Document* when you are finished.

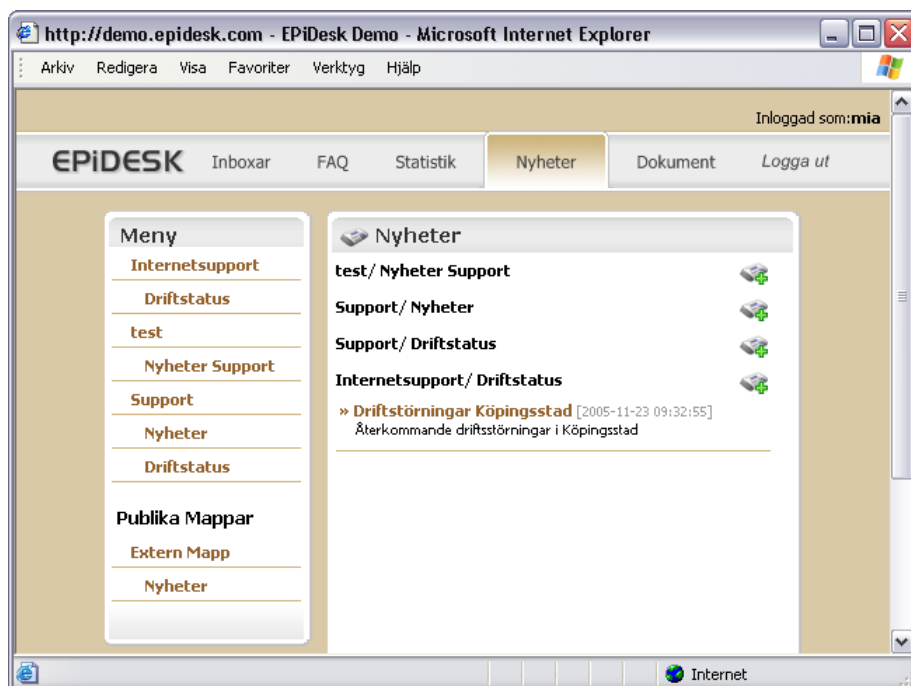
## Deleting a Document

1. Select the document you want to delete. If you are authorized to edit and delete, the *Edit* symbol is shown at the bottom right, following the document description. 
2. Click the *Edit* symbol.
3. Click *Delete*

## News


Click the *News* tab on the main menu.

An inbox can contain the news related to it. You can also choose to store news in public folders. The news you upload to a public folder is the same news that can be read from the extranet.



## Creating News

To add news to an inbox or external folder, do the following:

1. Click the "green plus sign" to open the *Create news* folder. 

http://demo.epidesk.com - Skapa nyhet - Microsoft Int...

### Skapa nyhet

Titel:

Introduktion:

Innehåll:

Skrivet av:

Internet

2. Enter *Title*, *Introduction*, *Content* and *Written by*.
  3. Click *Create*, or click *Cancel* to cancel this action.
- News is displayed on the main page as follows:

#### Internetsupport/ Driftstatus



- » **Driftstörningar** [2005-11-25 10:33:46]  
 Nyinstallation av servrar kommer att pågå under vecka 49

#### Reading News

Click the link/title to read the entire news item.

- » **Driftstörningar** [2005-11-25 10:33:46]  
 Nyinstallation av servrar kommer att pågå under vecka 49  
 Under vecka 49 kommer IT-avdelningen byta ut befintliga servrar mot nya. För att minska störningarna så mycket som möjligt kommer bytet att ske kvällstid.  
**Skrivet av:** Katarina K

The *Content* and *Written by* fields are now also shown.

#### Editing News

1. If you are authorized to edit, click the *Edit* icon.
2. Follow the steps in the instructions above to create news.
3. Don't forget to click *Save* when you're finished.



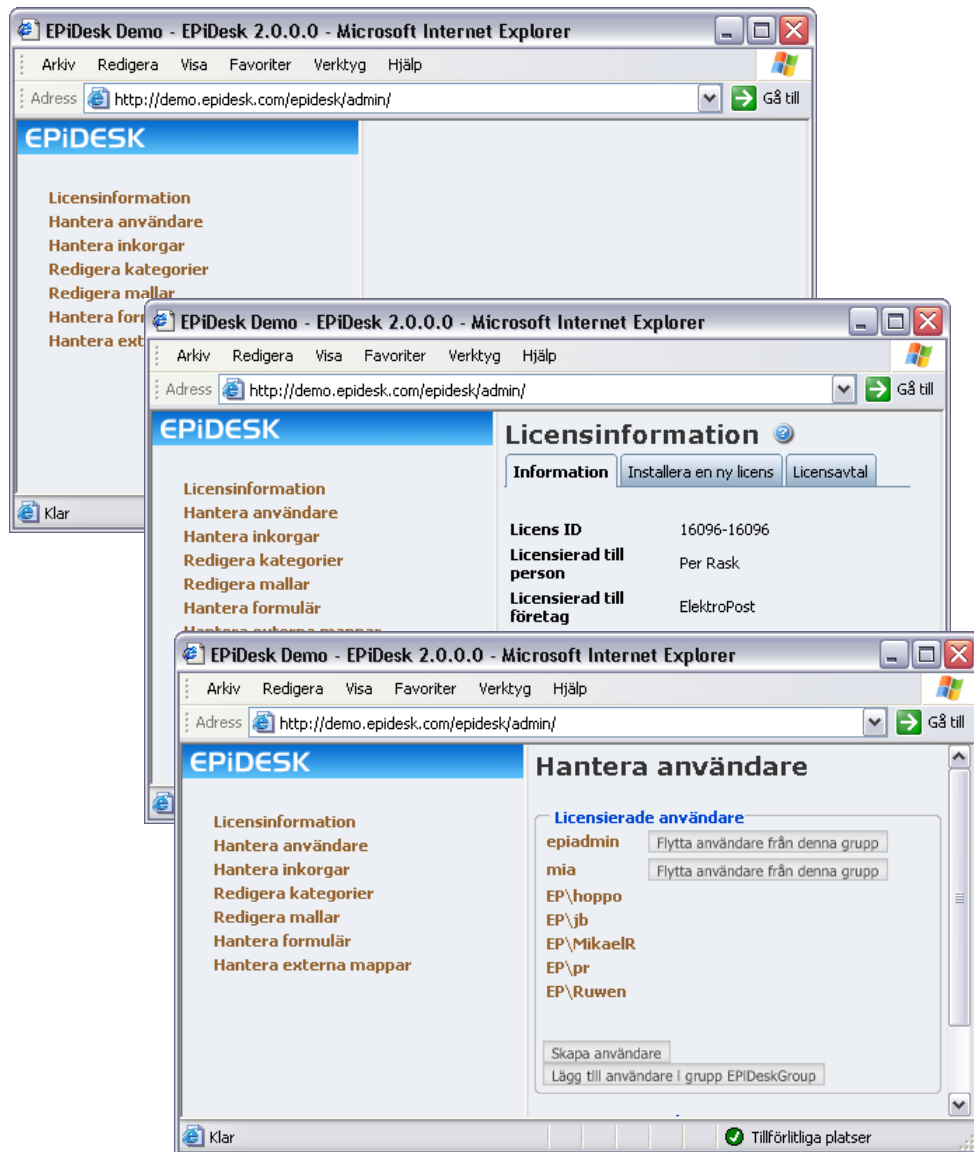
#### Deleting News

1. If you are authorized to delete, click the *Edit* icon.
2. Click *Delete*



## Administrator Interface

Administrator interface is where you manage inboxes, users, licenses and much more. You get to administrator interface by entering `http://domainname.com/epidesk/admin/`.



## Login

You get to the administrator interface by entering "/admin" after the URL.  
E.g. <http://domainname.com/EPiDesk/admin>.



The login form has a blue header with the text "EPiDESK". Below the header, there are two input fields: "Namn" (Name) and "Lösenord" (Password). Below the password field is a checkbox labeled "Automatisk påloggning mot den här webbplatsen" (Automatic login to this website). A "Logga in" (Login) button is located to the right of the checkbox. At the bottom of the form, there is a link: "Om du loqar in kommer cookies att användas" (If you log in, cookies will be used).

Enter your name and password, and click *Login*

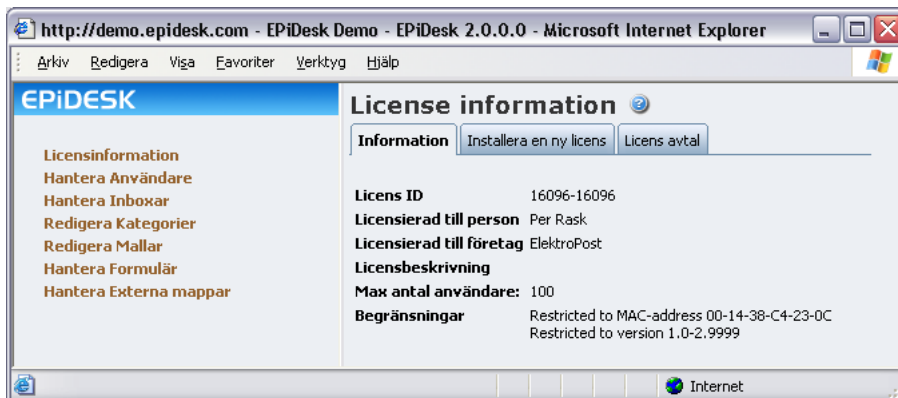


From here, you administer everything that concerns licenses, users, inboxes, categories, etc.

## License Information

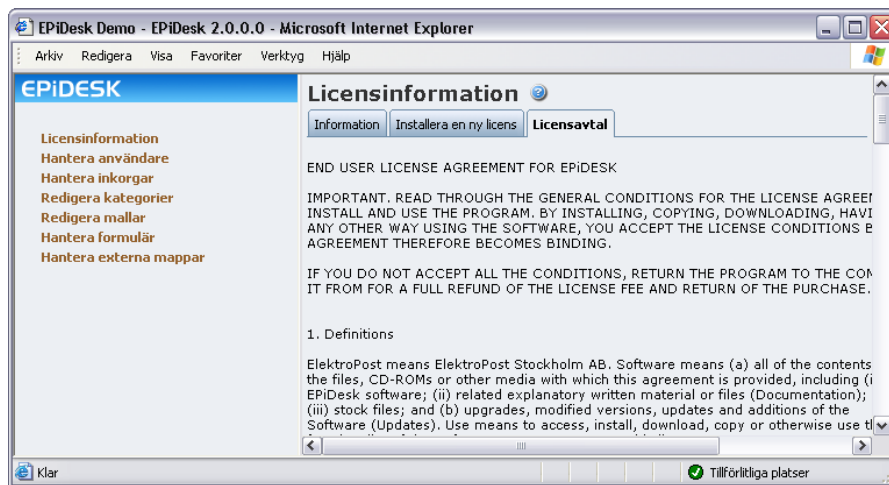
In Admin mode, select *License Information* from the left-hand menu. The License Information tab is shown. Here, you can find out who the program is licensed to, which company, maximum allowable users, ID and restrictions.

The license is a file connected to a specific computer's IP or MAC address. The basic package includes a license for five users. Upgrading to a new version or more licenses requires installation of a new license file.



## License Agreement

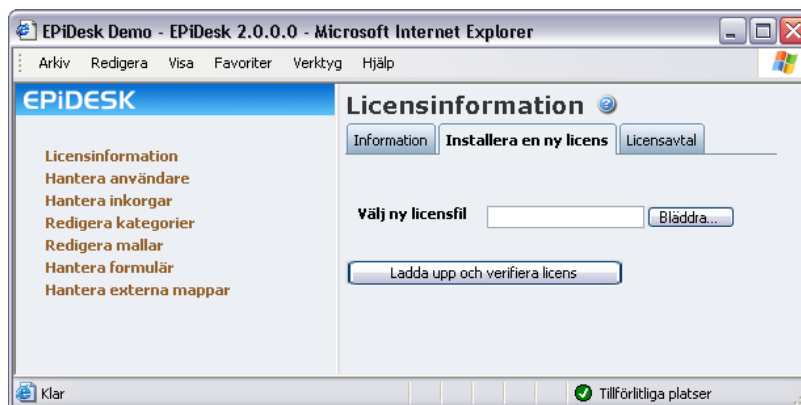
Click the *License Agreement* tab to open the entire agreement text.



## Installing a New License

The license file is sent via e-mail from EPIServer's license managing system (through the dealer EPiDesk was purchased from). Store the license where it is easily accessible during file installation, such as on the computer's desktop.

1. Click the *Install a New License* tab.



2. Click *Browse* beside the *Select new license file* field.
3. Click *Desktop* in the *Open* dialog box (or find the file where you chose to store it).
4. Select the license file, and click *Open*.
5. Click *Upload and Verify License*.
6. Once the file is uploaded, the *Information* tab is updated automatically. Click the *Information* tab to verify.

## Managing Users

In Admin mode, select *Manage Users* from the left-hand menu. A list of licensed users is shown. You can add and move users to and from the EPiDeskGroup. EPiDeskGroup is the default group when EPiDesk is installed. You can send passwords to external users via e-mail.



### Licensed Users

Licensed operators that are created must be members of the default EPiDeskGroup.

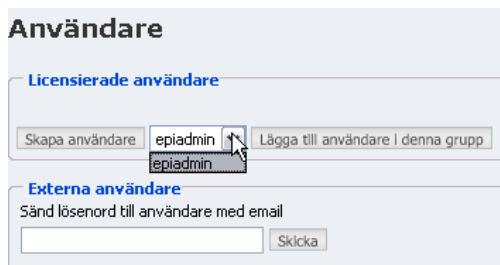
### Moving/removing users

To remove a user from the group, click *Remove User from Group*.

### Adding users

To add a user to the EPiDeskGroup, do the following:

1. Click *Add User to EPiDeskGroup*.



2. Click the drop-down arrow and select the user to be added.
3. Then, click *Add User to EPiDeskGroup*. The user is now a member of the EPiDeskGroup.

### External Users

When a user has forgotten his password, the administrator can re-send the same password via e-mail. The password is encrypted and stored in a database, so the administrator never sees it.

**Externa användare**  
Sänd lösenord till användare med email

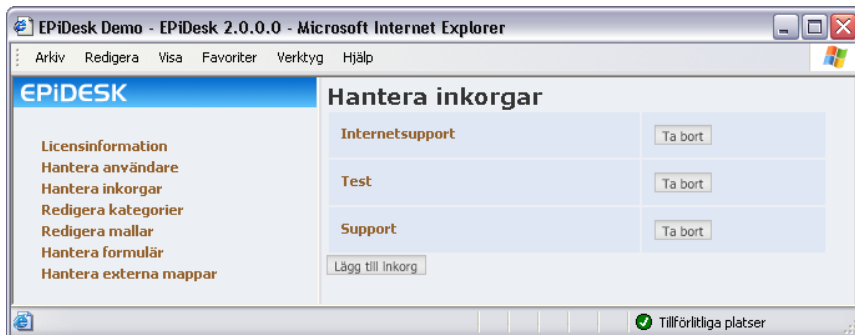
Do the following:

1. Enter the external user's e-mail address in the field.
2. Click *Send*.

A message is now sent to the e-mail address entered. The message contains the username (e-mail address) and password.

## Managing Inboxes

In Admin mode, select *Manage Inboxes* from the left-hand menu. Here, you manage all inboxes with all the settings for replies, how long a case may be open, which texts are written in auto-replies, reminders etc.: in other words, all the settings for respective inboxes. It is also here that you add new or delete old inboxes.



## Creating Inboxes

To create a new inbox, do the following:

1. Click *Add an Inbox*.

**Hantera inkorgar**

Ny inkorg baserad på

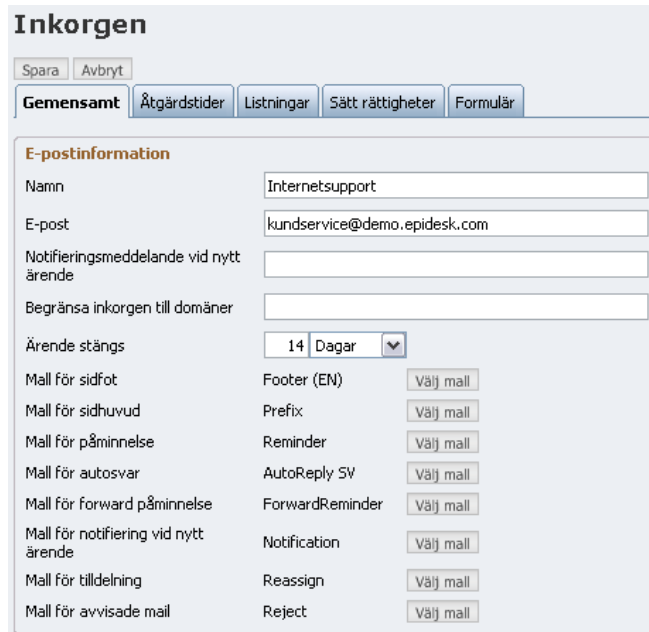
Namn

E-postadress

2. From the *New Inbox based on* field on, you select the inbox who's settings you want to copy. In this way you avoid making settings from scratch. If you do not want to base the inbox on another, leave the *New Inbox based on* field blank.
3. Enter a name for the inbox.
4. Enter the e-mail address of the person who will be notified with a message every time a new case comes to the inbox.
5. Click *Add*.

## Inbox Settings

To administer an inbox, click the inbox name. The inbox opens on the Common tab.



When you have made the settings for the inbox, click *Save*. To cancel without saving, click *Cancel*.

### The Common tab

This is where you enter the inbox's name and e-mail address. You can also restrict the inbox to certain domains. Enter domain names and divide them with a semicolon (;) when there are more than one.

#### *Notification e-mail on new case*

This is where you enter the e-mail address of the person or persons who will receive a message every time a new case comes to the inbox. Enter e-mail addresses with a semicolon (;) to divide when there are more than one.

#### *Pending timeout*

This is where you enter the time until the case is closed. A case is closed automatically if it has had Pending status for more than 14 days. After 70% of this time has gone, a message is sent to the user as a reminder that a reply still has not been made (if this is defined on the "Reminder template").

After 14 days, the case is closed automatically. It is possible to change this time via the Properties button in operator interface. (Read more about managing times for warning messages and pending timeouts on p. 41).

### The different templates explained

#### *Footer template*

The example below shows the *Footer (Sv)* template. This template is used for the default text written at the bottom of all e-mail messages from this inbox.



Till er tjänst,  
ElektroPosts kundtjänst

**Kommentarer?** Svara bara på detta epost-meddelande om du har synpunkter eller kommentarer. Ditt meddelande kommer automatiskt att knytas till ärendet.

**Problemet löst?** [Klicka här](#) för att följa ditt ärende online, med möjligheten att stänga ärendet. Du behöver ett lösenord för att följa ärendet: {CaseTicket}

#### Prefix template

The example below shows the *Prefix* template. This template is used for the default text written at the top of all e-mail messages from this inbox.

**Regarding case #**{PageLink}, {PageName}

#### Reminder template

The example below shows the *Reminder (SV)* template. This template is used for the text written in reminders sent from this inbox. A reminder is sent to users who have not responded to an earlier reply. The reminder is sent after the time specified in respective inboxes.

Ert ärende #{PageLink} "{PageName}" väntar på återkoppling från er om ni inte svarar på detta meddelande kommer vi automatiskt att stänga ärendet. Om du väljer att svara kommer ärendet att öppnas och bli läst av någon på vår support.

**Problemet löst?** Ni kan då stänga ärendet direkt [här](#). För att komma in i denna area måste ni använda denna hemliga kod: {CaseTicket}

**Varför fick du detta mail?** Antagligen för att vi inte vet om vårt senaste svar hjälpte er.

Till er tjänst,

#### Auto-reply template

The example below shows the *Auto-reply SV* template. This template is used for the text written in the auto-reply, sent from this inbox as soon as a case arrives.

Hej,  
Din fråga har tagits emot och givits ärendenummer: {PageLink}.

**Kommentarer?** Om du kommer på någonting ytterligare eller vill skicka in kommentarer så skickar du bara epost till adressen [{PageLink}@epidesk.ep.se](#) eller svarar på detta mail.

**Andra frågor?** Har du andra frågor så skicka dessa i ett nytt epost-meddelande till [support@epidesk.ep.se](#). Då skapas automatiskt ett nytt ärende. Undvik att blanda in andra frågor i detta ärende (dvs besvara inte detta epostmeddelande med andra frågor).

..

#### Forward reminder template

The example below shows the *ForwardReminder* template. This template is used for the text written in the messages sent from this inbox to persons who have received a forwarded message, but not replied. The time at which this message is sent is configured for respective inboxes.

```
A question is waiting for feedback from you.

Regards
ElektroPost Customer Support

-----The original case email-----

From: {From}
Subject: {PageName}
Message:
{MainBody}
```

#### *Template for new case notification*

The example below shows the *Notification* template. This template is used for the messages sent to those persons requiring notification when a new case has come to the inbox.

```
A new case #{PageLink} "{PageName}" has been created in {Inbox}

-----The original case email-----

From: {From}
To: {To}
Subject: {PageName}
Message:
{MainBody}
```

#### *Template for reassign*

The example below shows the *Reassign* template. This template is used for messages sent to the person to whom a case has been assigned. The assigning is placed in the case's properties/settings.

```
A case #{PageLink} "{PageName}" has been assigned to you in
{Inbox}

-----The original case email-----

From: {From}
To: {To}
Subject: {PageName}
Message:
{MainBody}
```

#### *Reject template*

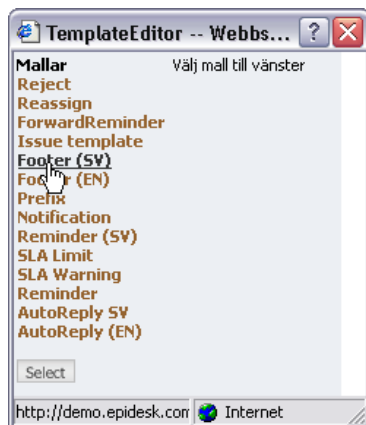
The example below shows the *Reject* template. This template is used for the messages sent to anyone trying to send a case to an inbox restricted to certain domains. Persons trying to send a case receive a message stating that they do not have permission to do this.

The inbox {To} is configured to reject mail from your maildomain.  
Please contact site administrator for further information.

#### Templates - select or switch template

Every template contains the text content which is written in a reminder, auto-response, footers at the bottom of all types of e-mail messages, etc. For more information about contents in respective templates you can read more in the Editing Templates section on p. 49.

To select or switch template, click *Browse template*.



Select one of the templates, and click *Select*.

### The Response times tab

Click the *Response Times* tab.

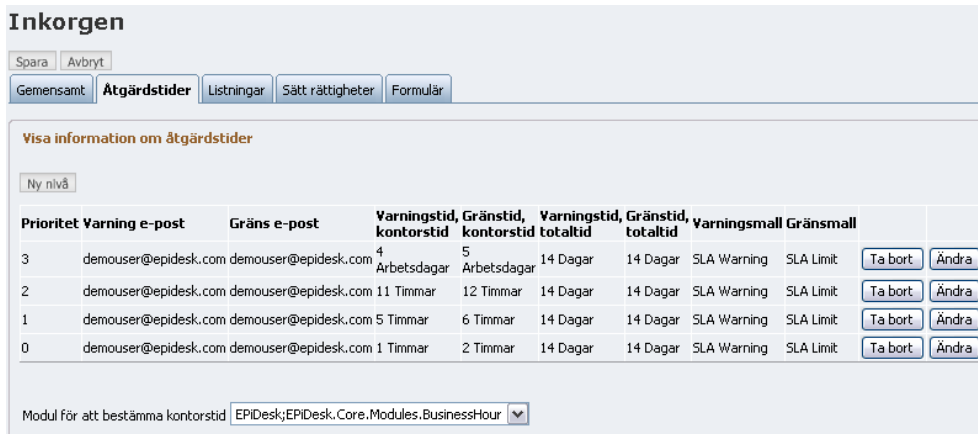
Response times is a feature with which you can create automatic messages connected to different priority levels. This feature can be used with e-mail to notify those in an organization responsible for making sure cases are responded to within a certain time (escalation). Every priority level can be configured with a warning time and a time limit for business hours or total time.

Business hours are defined in a module (see below) and normally consist of the time an organization employs workers, or the hours included in a service undertaking, SLA, etc.

Hours are counted from the time a case arrives in the inbox, until it is replied to (status changed to pending) or closed.

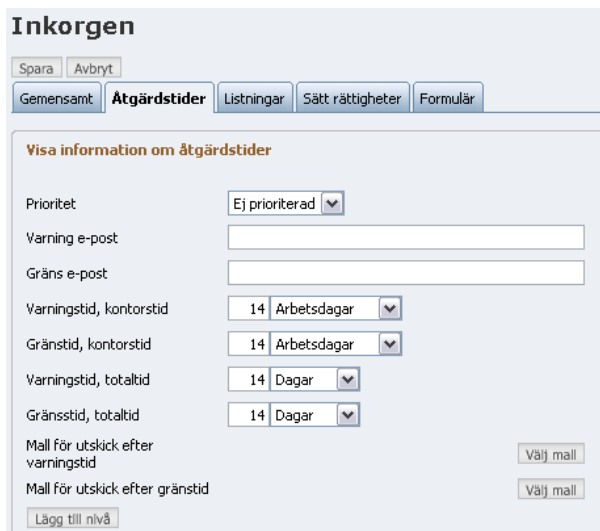
Warning time- business hour and Time limit - business hour are only counted during business hours.

Total time is counted from when a case arrives in an inbox until it is replied to (status changed to pending) or closed. Total time is not related to business hours.



*Create new response time*

To create a new response time, click *New Level*.



*Priority*

Here, you enter the priority for a response time. Select from Not Prioritized, Priority 1, 2 and 3. The number of levels and level names can be customized and set up during installation by the partner who delivers EPiDesk to the customer.

*Warning e-mail*

Here, you enter the e-mail address to which your warning message is sent, when the warning time for a case has been reached. When entering multiple e-mail addresses, separate them with a semicolon (;).

*Limit e-mail*

Here, you enter the e-mail address to which your warning message is sent when the warning time for a case has been reached. When entering multiple e-mail addresses, separate them with a semicolon (;).

*Warning time - business hour*

Here, you enter the allowable time from when a case comes until a warning message is sent. The message is sent to the e-mail address entered in the Warning e-mail field above. Warning time - business hour is only counted during business hours.

*Time limit - business hour*

Here, you enter the allowable time from when a case comes until a message is sent stating that

the time limit has been reached. The message can be sent to a manager within the organization, and escalated in this way. The message is then sent to the e-mail address entered in the Limit e-mail field above. Time limit - business hour is only counted during business hours.

#### *Warning time - total time*

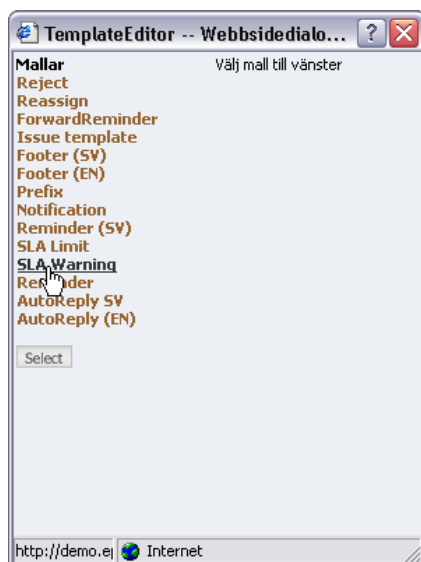
Here, you enter the allowable time from when a case comes until a warning message is sent. The message is sent to the e-mail address entered in the Warning e-mail field above. Warning time - total time is not related to business hours.

#### *Time limit - total time*

Here, you enter the allowable time from when a case comes until a message is sent stating that the time limit has been reached. The message can be sent to manager within the organization, and escalated in this way. The message is sent to the e-mail address entered in the Limit e-mail field above. Time limit - total time is not related to business hours.

#### *Template for warning when case not handled*

1. Click *Browse Template* to select a template to send when the warning time has been reached.



2. Select the *SLA Warning* template (this is the default installation - there may be others to choose from).
3. Click *Select*.

#### *Template when case not handled*

1. Click *Browse Template* to select a template to send when the warning time has been reached.
2. Select the *SLA Limit* template (this is the default installation - there could be others to choose from).
3. Click *Select*.
4. Click *Add Level*.

#### *Module to determine business hour*

This is where you indicate the module for business hours. A module for business hours is included in the delivery of EPiDesk: Monday to Friday 8AM - 5PM. You can customize business hours by developing your own business hours module and adding it to the EPiDesk system. (see EPiDesks technical documentation).

5. Don't forget to click *Save* when you're finished.

### The Lists tab

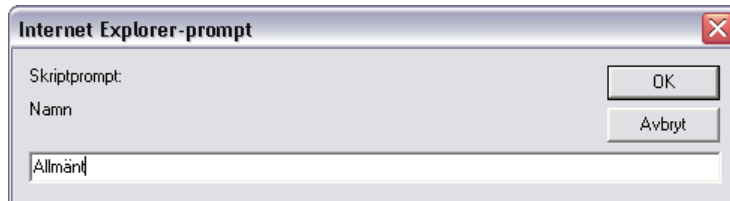
Click the *Lists* tab.

Here, you enter names for news and document groups for each inbox. To better understand what this means, it can also be described as a container for news articles and documents. The changes you make here apply to the inbox you administer - as opposed to generally for all inboxes.



Add a news list

1. Click *Add* under *News lists*.



2. Enter a name in the user prompt, and click *OK*.

Add a document list

1. Click *Add* under *EPiDesk DocumentFolder*.
2. Enter a name in the user prompt, and click *OK*.

Delete a list

Click *Delete* beside chosen list.

### The Access Rights tab

Click the *Access Rights* tab.

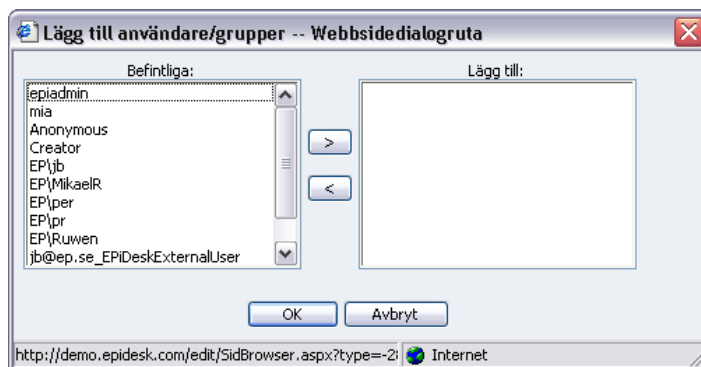
On the *Access Rights* tab you'll find all you need for *administration of access rights*. Here, you can add groups or users, as well as edit authorization/access rights for groups, users and super users. The changes you make here apply to the inbox you administer - as opposed to generally for all inboxes. The window is divided into two sections: *Set Access Rights* and *Super Users*

*Note* The changes you make here apply only to the inbox you administer; in other words, the inbox selected when you earlier selected *Manage Inboxes* and a specific inbox, before clicking on the *Access Rights* tab.



Adding a group or user

1. Click *Add Group* or *Add User*. You can also enter part of a user or group name, and click *Search*.



The window consists of two sections: *Existing* and *Add*. The Existing box contains all existing users and groups.

2. Select the user or group you want to add.
3. Click the *arrow* pointing towards the *Add* box. The user or group has now been moved to the Add box.
4. Click *OK* when you are finished.

The user or group is now added, but currently has only Read rights.

*Changing access rights for groups or users*

1. Select or clear the check boxes for Create, Change, Delete, Publish or Administer.
2. Click *Save* at the top of the window.

*Deleting a group or user.*

1. Click *Clear* at the end of the group's or user's row.
2. Click *Save* at the top of the window.

*Super users*

Do the following to add a new super user:

1. Click *New Super User*.

**Superanvändare**

E-post

Avgränsa användare till domäner

Sänd lösenord till användare

E-post	Avgränsa användare till domäner
--------	---------------------------------

2. Enter the super user's e-mail address.
3. You have the option to select *Restrict user to domains*. If you do not restrict to domains, the super user will be able to view all cases in the inbox.
4. Enter the name of the domain which the super user is restricted to. Leave blank if the check box above it is clear.
5. Select the *Send ticket to user* check box if you want to send the e-mail message containing username and password information to the super user.
6. Click *Add User*.

An e-mail message containing password and login information is sent to the super user. The super user uses her e-mail address as a username when logging in to the extranet. <http://www.company.se/epidesk/public> (same login procedure as users)

7. The super user is added to the list below:

E-post	Avgränsa användare till domäner		
rb@ep.se	ep.se	<input type="button" value="Ta bort"/>	<input type="button" value="Ändra"/>

8. Click *Save* at the top of the window when you are finished.

#### *Deleting a super user*

1. Click *Delete* at the end of the row.

The super user is deleted at once.

#### *Editing a super user*

1. Click *Edit* at the end of the row.
2. Make desired changes to the various fields.
3. Click *Update user*.
4. Click *Save* at the top of the window when you are finished.

## **The Forms tab**

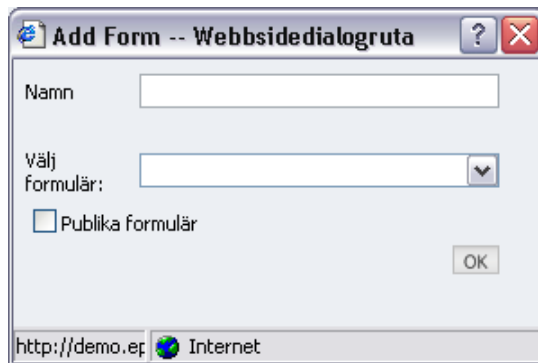
On an extranet, users can normally fill out a form to send a case to support. If a user intends to use forms and send e-mails, the e-mail address for the inbox must be indicated. If you want to remove the possibility to send e-mails, you have to delete the e-mail address from the E-mail field (click *Manage Inboxes*, select the inbox name and delete the e-mail address from the E-mail field).





To add a form, do the following:

1. Click *Add* to add a form.





















2. Enter a *name* for the form. The form name automatically becomes a shortcut/URL to that form, e.g. `www.company.com/name`.
3. Select a form by clicking the drop-down arrow to the right of *Choose form*. The available forms in this list have been created in administrator interface *Manage Forms* (see p. 51). You can select several forms connected to the same inbox.
4. Select the check box if you want the form to be public.  
If the form is not public it can be connected to a user group in the company's catalog server, so that only users logged in to the network (intranet) can access it.
5. Click *OK* when you are finished.





## Editing Categories

In Admin mode, select *Manage Categories* from the left-hand menu. When an operator is handling a case and clicks the Properties button, it is possible to select case categories. Here, you decide and administer which categories are shown, and in what order they are listed. You can add new categories, delete categories, move them, etc.

**Kategorier** 

*Definiera de kategorier som din webbplats använder. Dessa kommer att vara tillgängliga i redigerläget för varje sida under "Kategorier".*

Flytta upp	Flytta ner	Namn	Beskrivning	Synlig	Valbar	Lägg till	Ta bort	
		Mjukvara	Fel i mjukvaran	x	x			<input type="button" value="Ändra"/>
		Office 2003	Fel i Microsoft Office 2003	x	x			<input type="button" value="Ändra"/>
		Standardsystem	Fel i standardsystem	x	x			<input type="button" value="Ändra"/>
		Hårdvara	Fel i hårdvaran	x	x			<input type="button" value="Ändra"/>
		Persondatorer	Fel i persondatorer	x	x			<input type="button" value="Ändra"/>
		Bärbara datorer	Bärbara datorer	x	x			<input type="button" value="Ändra"/>
		Stationära datorer	Stationära datorer	x	x			<input type="button" value="Ändra"/>
		Pekdon	Pekdon	x	x			<input type="button" value="Ändra"/>
		Server	Fel på servern	x	x			<input type="button" value="Ändra"/>
		Teckensnitt	Teckensnitt	x	x			<input type="button" value="Ändra"/>

 Flyttar kategorin upp ett steg i listan.  
 Flyttar kategorin ner ett steg i listan.  
 Lägg till kategori under vald kategori. Observera att du måste spara för att förändringen skall slå igenom.  
 Ta bort kategori. Observera att om kategorin har underliggande kategorier kommer de att flyttas upp en nivå.

### New category

1. Click *Add*.
2. Enter a name in the *Name* field. This name is used in programming.
3. Enter a description in the *Description* field. This name is seen by operators (support personnel) when selecting a category. The field can also be language-encoded.
4. Select whether the category will be *Visible* and/or *Selectable*.
5. Click *Save*. The new category is added at the bottom of the list.

**Tip** You can click *Add* on the row of any category to add a new category under it. Enter name and description, and click *Save*.

### Edit a category:

1. Click *Edit* beside a category to edit that category's information.
2. Click *Save*.



Move category up in the list.



Move category down in the list.



Add category under current.



Delete category from the list.

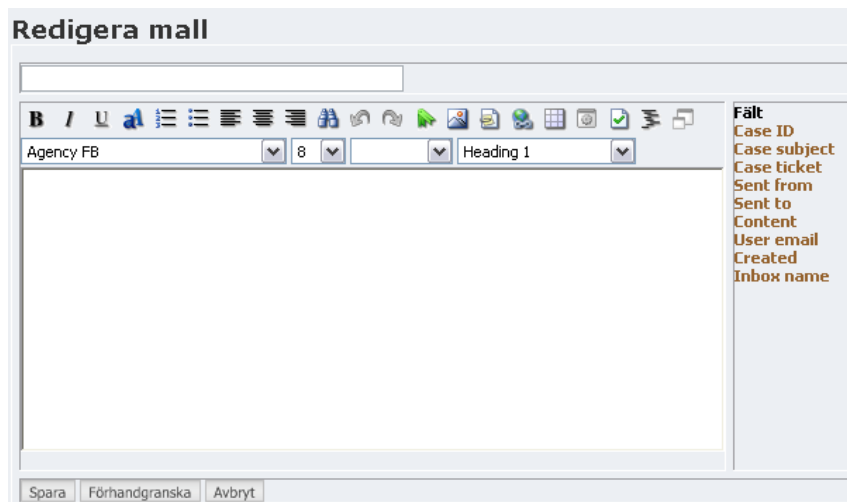
## Editing Templates

In Admin mode, select *Manage Templates* from the left-hand menu. Here, you administer existing templates used when creating settings for respective inboxes. You can also delete templates or add/create new templates.



## Adding/Creating a Template

1. Click *Add New*.



In the editor you can edit the text and add or delete fields found there. Fields found in the editor are enclosed by braces {}, e.g. {CaseTicket}. You have many possibilities to customize format and layout with the help of the editor's powerful editing features (for more information on formatting in editor, read the section, *The editor*, on p. 11, read about fields in the right-hand box in the following section, *Explanation of the various fields*).

1. Enter a *name* for the new template.
2. Enter desired text content in the editor window.
3. To insert a field, point to it in the right-hand column. Hold down the mouse button and drag and drop the field where you want it in the editor.
4. Click *Preview* before you approve it, by clicking *Save*.

## Explanation of the Various Fields

### Case ID

The case number automatically assigned each case.

### Case subject

The text or caption entered on the subject line of an e-mail message (or the subject line of a form).

### Case ticket

The automatically generated password connected to the user's e-mail address.

### Sent from

The user's name shown with the e-mail address.

### Sent to

The e-mail address (inbox address) a case is sent to.

### Content

The text content a user enters in the body, or "message field", of an e-mail message (or online form).

### User e-mail

The user's e-mail address.

### Created

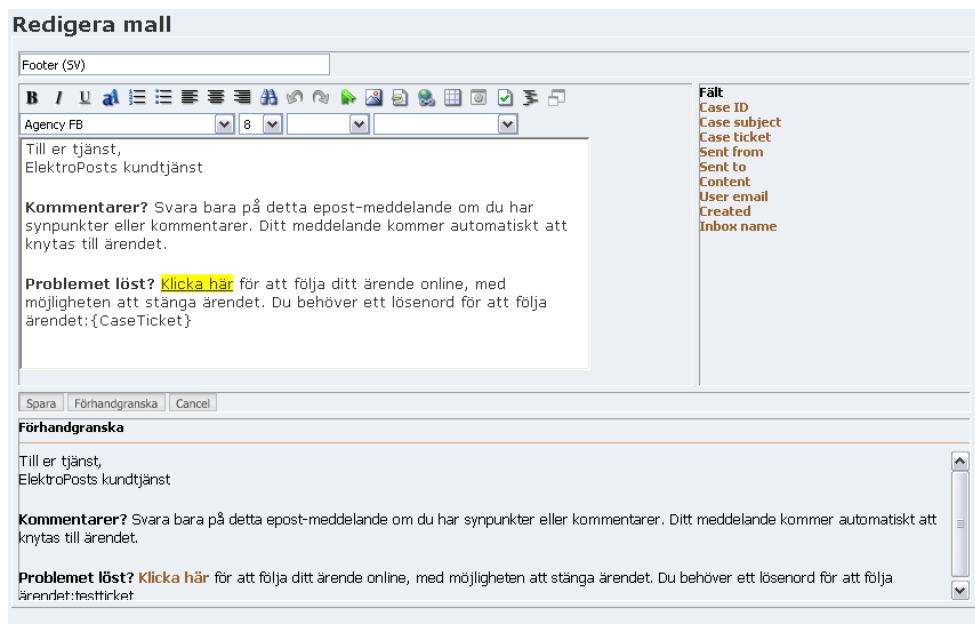
The date and time a case came to an inbox.

### Inbox name

The name of the inbox.

## Editing a Template

1. Click *Edit*.



Read the section above for instructions on how to insert text and fields in the editor.

2. Make the necessary changes. Add or remove fields.
3. Click *Save* (below the editor).

4. Click *Preview* to preview the result in the lower box. Click *Cancel* to cancel this action.

## Copying a Template

To avoid having to create templates from scratch, it can sometimes be better to copy an existing template and make adjustments to it.

1. Click *Copy*.
2. The name *Copy of XXX* is now shown in the name field at the top.
3. *Rename the template* something else.
4. Make necessary changes (see instructions in the section, *Editing a template*, on p. 50).
5. Don't forget to click *Save*.

## Deleting a Template

1. Click *Delete*.



2. Click *OK* to delete. Click *Cancel* to cancel this action.

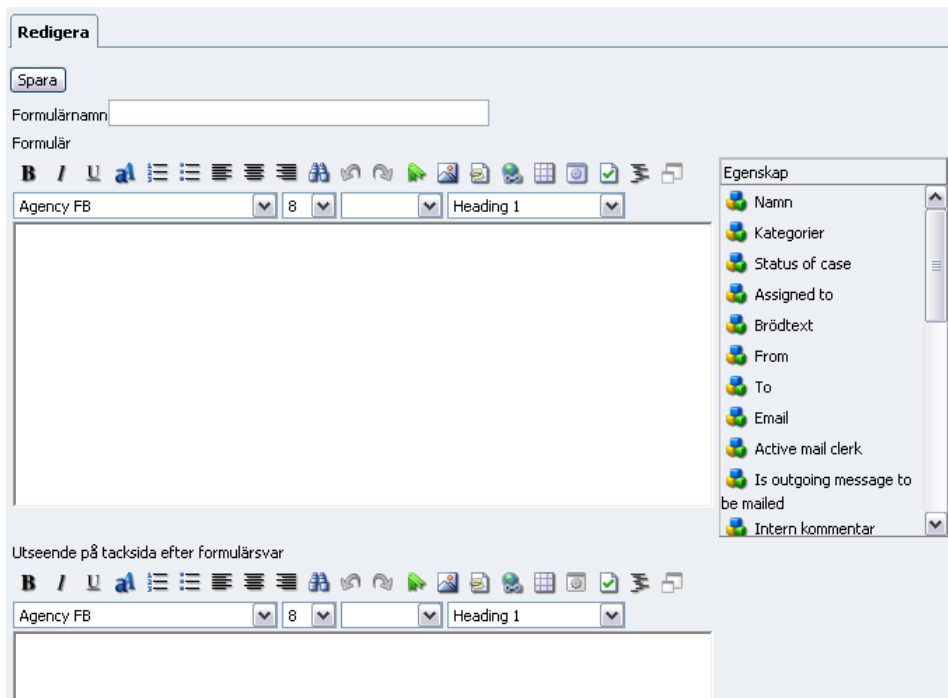
## Managing Forms

In Admin mode, select *Manage Forms* from the left-hand menu. Here, you create and edit the forms indicated when you administer an inbox (Manage Inbox, Select an Inbox, the Forms tab). The form indicated here is the same form that will be filled out by a user wishing to receive support.

Forms consist of text, tables and properties. Tables are used to make it easier to place properties (fields) where you want them. Properties act as containers for the information later stored in the database to be worked on and written. For more information on tables, see the Editor's manual for EPiServer CMS. It can be downloaded in PDF format from [www.episerver.se](http://www.episerver.se).

## Creating Forms

1. Click *Add*.



2. Enter a name in the *Form name* field. The form name automatically becomes a shortcut/URL to that form, e.g. [www.company.com/name](http://www.company.com/name).
3. Enter all text in the editor, and drag and drop the properties you want to include there. Read more about properties in the following section, *Explanation of properties*
4. Enter also text in the *Layout of page after form been sent* editor.
5. Click *Save* when you are finished.

## Explanation of Properties

Property	Description
Name	The case's title. If the "Incoming e-mail" feature is activated, this property is included in the message heading. Shown as text box. In programming, this property is indicated by PageName.
Category	A case's categories. Shown as check boxes. In programming, this property is indicated by Category.
From	The name shown for a user. Shown as text bar. In programming, this property is indicated by From.
E-mail	The e-mail address of the person who created a case. Auto-replies are sent to this address. Shown as text bar. In programming, this property is indicated by E-mail.
Body text	The contents of a case. If the "Incoming e-mail" feature is activated, this property is included in the message text. Shown as editor. In programming, this property is indicated by MainBody.
Priority	A case's priority. Shown as drop-down list. In programming, this property is indicated by CasePriority.

Property	Description
Status of case	This property represents a case's status. Shown as drop-down list. In programming, this property is indicated by CaseStatus.
Assigned to	The name of the person to whom a case is assigned. Shown as drop-down list. In programming, this property is indicated by AssignedTo.
To	Receiver address in an e-mail to an inbox (most likely not used in forms). Shown as a text bar. In programming, this property is indicated by To.
Is outgoing message	Indicates whether a case is to be sent (most likely not used in forms). Shown as check box. In programming, this property is indicated by OutgoingMessage.
Internal comment	Indicates whether a case is an internal comment (most likely not used in forms). Shown as check box. In programming, this property is indicated by IsInternalComment.
Timeout for pending case	Time limit for how long a case may be pending before it is closed. Shown as a text bar with drop-down list for units. In programming, this property is indicated by PendingTimeout.
Worked time in hours:	The worked time spent on a case. Shown as a value against saved hours, which can be edited to increase time use. In programming, this property is indicated by WorkedTime.
CC e-mails	Refers to the Cc line in e-mails sent by the system. Shown as text bar. In programming, this property is indicated by CCGroup.
When reminder was sent	The date and time a reminder was sent (most likely not used in forms). Shown as date/time selector. In programming, this property is indicated by RemindersSent.
Case has a HTML body	A Boolean value indicates if the contents are in HTML format. Shown as check box. In programming, this property is indicated by IsHtmlBody.
Is response time warning sent	Boolean value which indicates if a warning has been sent (most likely not used in forms). Shown as check box. In programming, this property is indicated by IsSLAWarningSent.
Is response time warning sent	Boolean value which indicates if a time limit has been sent (most likely not used in forms). Shown as check box. In programming, this property is indicated by IsSLALimitSent.
External resource	Indicates external resource e-mail to which a case is sent. Shown as text bar. In programming, this property is indicated by ExternalResource.
Master case	Indicates to which master case a subcase belongs (most likely not used in forms). Shown as vertical tab. In programming, this property is indicated by MasterCase.
Inbox for case	Indicates to which inbox a case belongs (most likely not used in forms). Shown as vertical tab. In programming, this property is indicated by CaseInbox.
Forwarded message	Boolean value which indicates if a message has been forwarded (most likely not used in forms). Shown as check box. In programming, this property is indicated by IsForwardedMessage.
Visible on public site	Boolean value which refers to replies from forwarded messages. Indicates if reply message is shown on a public Web site (most likely not used in forms). Shown as check box. In programming, this property is indicated by IsPublic.
Is reply on forwarded mail	Indicates if a case is a forwarded message (most likely not used in forms). Shown as check box. In programming, this property is indicated by IsForwardReply.

## Editing a Form

1. Click *Edit* beside the form you want to edit.

The form is shown in “Preview mode” (this is an example of a form).

Visa Redigera

**Kundservice**

**Kundservice**

Här kan du skicka in din fråga eller felanmälan. Glöm inte att ange din e-postadress eftersom svar kommer skicka från kundservice till den e-postadress som har angivits.

Ämne:

E-postadress:

Spara

2. Click the *Edit* tab.

Visa Redigera

Spara

Formulärnamn: Kundservice

Formulär

Agency FB 8 Heading 1

**Kundservice**

Här kan du skicka in din fråga eller felanmälan. Glöm inte att ange din e-postadress eftersom svar kommer skicka från kundservice till den e-postadress som har angivits.

Ämne:

E-postadress: {Email}

{Brödtext}

{Save Button}

Utseende på tacksida efter formulärsvar

Agency FB 8 Heading 1

Egenskap

- Namn
- Kategorier
- Status of case
- Assigned to
- Brödtext
- From
- To
- Email
- Active mail clerk
- Is outgoing message to be mailed
- Intern kommentar

Save Button

You can edit a form in the editor using standard methods, e.g. entering text, deleting text, etc. A trick for placing properties where you want them is to first place markers in the positions where the properties will be placed. Keep in mind that when you drag and drop a property from the right-hand window, the mouse pointer is shown as a four-arrow “move” icon.



3. Edit the text and add properties with drag and drop.
4. In the lower editor: *Appearance of page after form been sent* enter the text to be shown on the Thank You page when the user has filled out the form.
5. Click *Save* when you are finished.

## Deleting Forms

1. Click *Delete* beside the form's name.



2. Click *OK* to delete the form. Click *Cancel* to cancel this action.

## Managing External Folders (Public Folders)

In Admin mode, select *Manage External Folders* from the left-menu. Here, you administer how the external folders will work, which domains have access to which folders or if the folders show news or document list, etc.

An example could be a company which handles support for various customers - where each customer has different domains. When a user from customer X logs in to the extranet with his e-mail (name@customer.com), this user sees only the news and documents published in news and documents folders restricted to the customer1.com domain. In this way, information and relevant documents, agreements, etc. on the extranet can be directed to a specific customer.



## Creating a New External Folder

1. Click *New Folder*.

### Externa mappar

**Externa mappar**

Mappnamn

Domäner

Nyhetslistning

Dokumentlistning

Mappnamn	Domäner	Nyhetslistning	Dokumentlistning		
Extern Mapp		True	True	<input type="button" value="Ta bort"/>	<input type="button" value="Ändra"/>

2. Enter a name in the *Folder name* field.
3. In the *Domains* field, you enter the domains (separated by semicolons) which the external folder will be connected to.
4. Select the *News listing* and *Document listing* check boxes if you want to create a news folder, document folder or both.
5. Click *Add Folder* when you are finished. The new folder is added to the list of external folders.
6. Click *Save* when you are finished.

### Editing an External Folder

1. Click *Edit* to the far right of the folder's name.

### Hantera externa mappar

**Hantera externa mappar**

Mappnamn

Domäner

Nyhetslistning

Dokumentlistning

Mappnamn	Domäner	Nyhetslistning	Dokumentlistning		
Extern mapp		True	True	<input type="button" value="Ta bort"/>	<input type="button" value="Ändra"/>

2. Make the required changes.
3. Click *Update Folder* when you are finished. The edited folder is once again shown in the list of external folders.
4. Click *Save* when you are finished.

### Deleting an External Folder

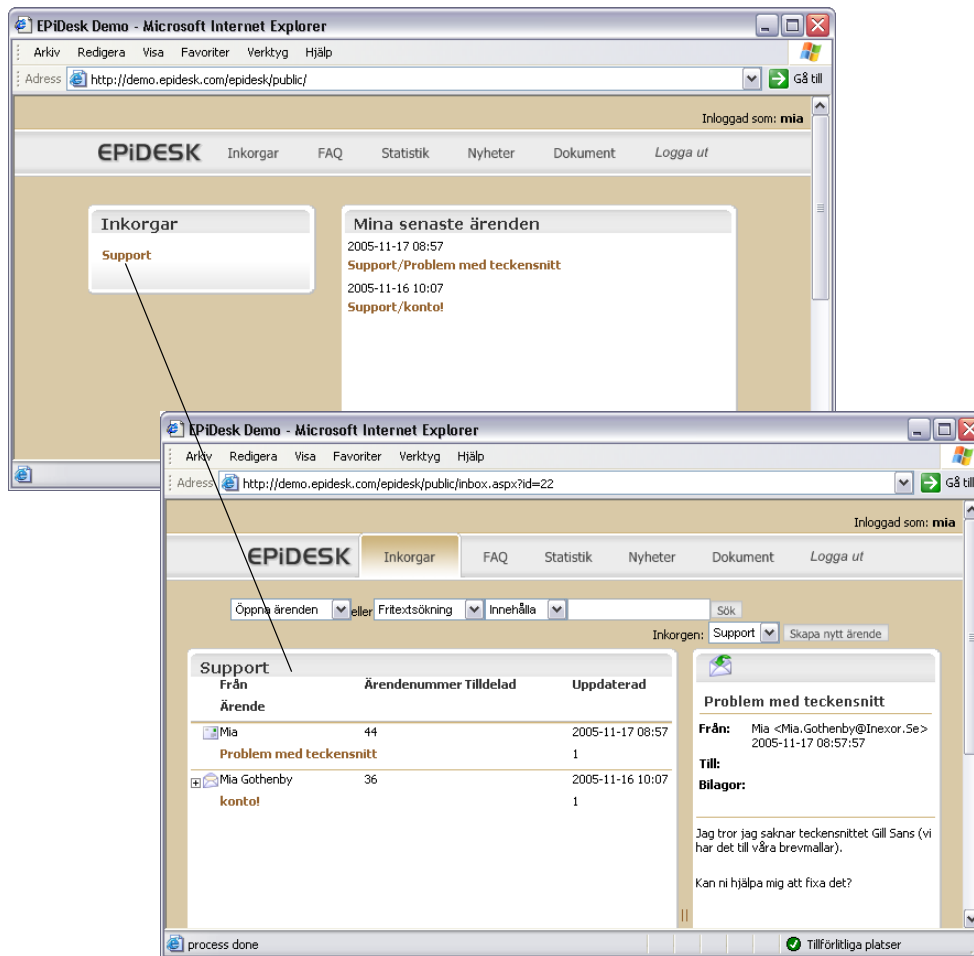
1. Click *Delete* to the far right of the folder's name.

2. The folder is deleted at once.

## Extranet for Users

This section goes through how EPiDesk works and how it appears for users or customers in the system. In EPiDesk there are two types of default users: Super users and Users. A user is someone who sends an e-mail to the system when she requires help, wishes to order a form or sends a question to a general e-mail inbox such as customer service. From then on, this person is called a user for the sake of simplicity.

A super user has more access rights than a user. A super user can use the extranet to view all cases in an inbox from users with one or more domain names. Read more about settings and creation of super users in the section For administrators - Managing Users, on p. 36).



## Creating a Case

There are three ways to create a case:

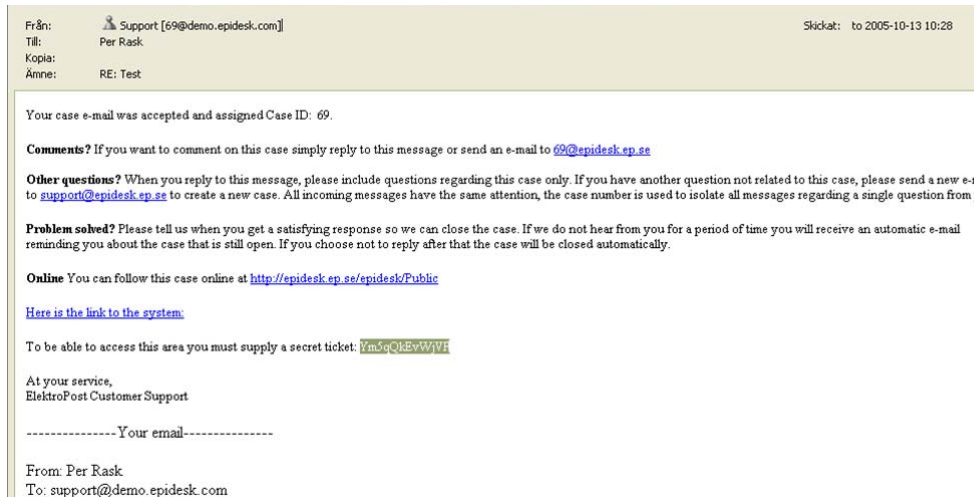
1. One typical way is when a user sends a form and that form is sent to an inbox as an e-mail.
2. A user can also send an e-mail message to a given e-mail address, e.g. support@company.com.
3. An operator can create a case in operator interface.

As soon as a case arrives in an inbox, it is assigned a Case ID (case number) consisting of a sequence of digits. Time calculation begins in order that warning messages are sent at the correct time. The case is worked on by an operator who assigns it a priority level. The operator can send a reply or add an internal comment (read more in the section *Operator Interface* on page 5).

## Auto-reply

As soon as a case arrives in an inbox, an auto-reply is sent back to the sender of that message. The appearance of the reply depends on what is written in the AutoReply template (default settings contains two templates: AutoReply SV and AutoReply Eng). The auto-reply contains the case number and an automatically-generated password. The password is connected to the user's e-mail address.

The reply also gives a link to the extranet, where the user can trace her case and manage it in various ways.



## Managing my Case

The auto-reply contains both the case number and the password. If you forget your password you can ask to receive it again. An administrator enters your e-mail address in Admin mode, and clicks Send. The administrator never sees your password as it is stored and encrypted in a database.

**Externa användare**  
Sänd lösenord till användare med email



To manage and trace your case, you have to have access to the extranet. A link to the extranet is given in the auto-reply. You should also be sure of how to log in to the extranet.

## Logging in to the Extranet

On the extranet, all users can trace their cases in the inboxes they were sent to. Do the following to go to the extranet and your personal cases:

1. Enter the extranet address in your browser's address bar. In the example above, this is *http://demo.epidesk.com/epidesk/public/*. The login box opens.

**EPIDESK**

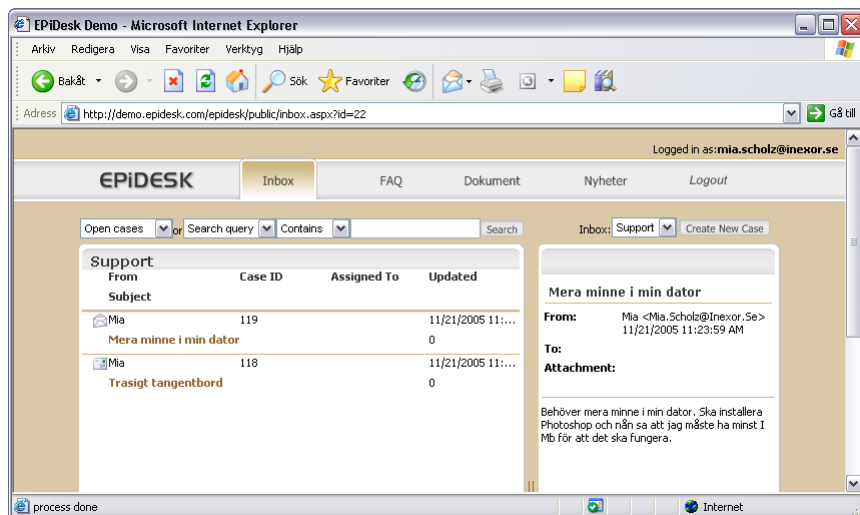
Namn

Lösenord

Automatisk påloggning mot den här webbplatsen

[Om du loggar in kommer cookies att användas](#)

2. Enter your e-mail in the *Name* field.
3. Enter the password you received, in the reply message in the *Password* field.
4. Click *Login*. The case you sent is now shown.



## Reading a Case

To read/view a case, click the subject line to the left. If a case has a thread with conversation - which could be several replies back and forth - you can click the plus sign in front of it to expand and view the entire thread.

The message content is shown in the right-hand window.




## Closing my Case

If you want to close a case yourself, do the following:

1. Click the subject line to the left.
2. Click *Close* above the right-hand window.



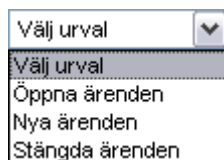
## Symbols

-  New case
-  Opened case
-  Closed case

## Select View

Here, you can choose to show all your open cases (cases handled by support), all new/unhandled cases and all closed cases.

Click the drop-down arrow beside the view options, and select from the list.



## Search

An easy way to find a specific case is by using the search feature.

### Begin search

1. Select *Search query*.



2. Enter a word in the search box, and click *Search*  
Once the search has filtered out one or more cases, the *Select view* option is shown.

Or:

1. Select the *Subject* option (search the subject line of all cases in the current view).
2. Select *Equal* or *Contains*. Then, enter the search text and click *Search*.  
Once the search has filtered out one or more cases, the *Select view* option is shown.

### **Restore**

To restore a search, do the following:

Click the drop-down arrow beside the view options, and select *New and open cases*.



## Licensing Model

The licensing model for EPiDesk is based on the number of named EPiDesk operators. An operator is someone who works in EPiDesk's operator and/or administrator interface. EPiDesk supports an unlimited number of external users (customers or persons reporting errors)

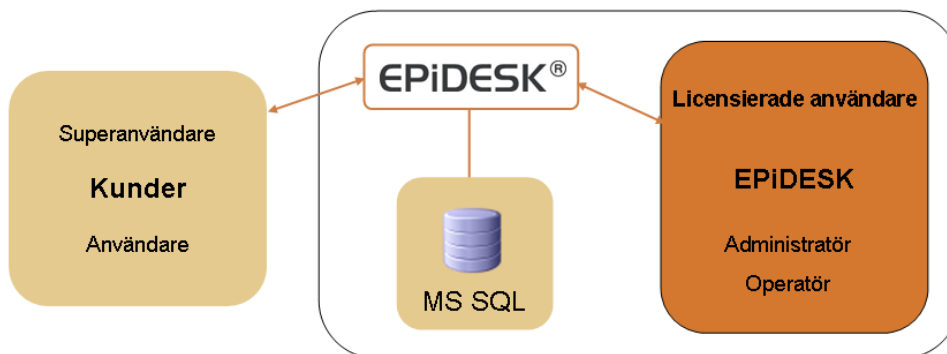
Basic delivery of EPiDesk includes a server license and five operator licenses. Additional operator licenses can be purchased if needed.

### EPiDesk Basic System

- Price per EPiDesk installation
- Includes support for five users, administrators & operators
- Also includes "runtime" from EPiServer CMS

### Additional

- Cost per additional administrators & operators
- Software subscription per year
- Possibly Microsoft SQL database license





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