

## Functional Synopsis

Release 3.21

### Users: Employees & Customers

- Unlimited technical/support personnel
- Personalization
- Wizard-driven custom fields
- Security for Internal, External & B2B
- Individual-level privileges
- Departmental hierarchies
- Multiple profiles
- Single-Sign-On
- API for creating users

### Ticket Submission

- Intuitive user interface
- User-defined context-sensitive help
- Email notification/confirmation
- Document upload / ticket attachments
- Tracking & multiple updates / upload capability
- Usage policies to restrict access by Type
- Submit on behalf of other user(s)
- Create tickets from multiple email accounts

### Ticket Administration

- Unlimited Queues
- Unlimited custom Ticket Type definitions
- Unlimited custom Ticket fields
- Manual or Workflow assignment by Ticket Type
- Dual data categorization (End-User & Tech)

### Resolution

- Service Level Agreements w/Escalation
- Multiple calendar business rules
- Document / Solution upload & download
- Estimated and actual time, plus job costing

### Process Tracking and Auditing

- "User Footprints" session tracking trails
- Alert of updates to tickets since last login
- Full activity/audit summary by ticket
- System-wide database-level auditing

### Corporate Identity Branding

- Multiple Company / Client capabilities
- User-defined labeling by Ticket Type
- Standard & custom Look-and-Feel themes
- Organizational branding for total confidence
- Unique perpetual and global site license
- Replace any image with company logos etc.

### Asset Tracking

- Integrated Asset Management

### Surveys & Customer Feedback

- Customer Feedback surveys
- Wizard-driven survey definition
- Quick Polls with instant results
- Multiple-instance surveys
- Real-time survey results preview
- Publish & distribute final results

### System Administration

- Real-time, parameterized control
- Browser/session timeout security
- Background Process management

### Workflow & Business Process Management

- Manual & multi-level automated ticket routing
- Real-time usage statistics
- Auto-assign to User, Department or Team
- Reverse Workflow & Auto-Close capabilities
- Assign, re-assign, auto-assign, reverse assign

### Business Intelligence

- Real-Time Data Warehousing
- Dashboard for system-wide service activity
- Core Report Library, Chart & Calendar formats
- Graphical and personalized drill-down analysis
- Manager reporting with multi-level statistics
- Integrate to enterprise reports
- Integrate to data warehousing
- Integrate with 3<sup>rd</sup>-party reporting tools

### Knowledge & Content Management

- Integrated, self-service knowledge base
- Search Term storage and analysis
- User Portal and service summary
- Search-and-Suggest™ keyword search
- Publish to knowledge base based on Ticket Type
- "My Notebook" for storing search results
- User-defined categorization and content
- Virtual Security for internal vs. external users
- Quick Links to Top10 Downloads

### Integration

- Real-time to Oracle Apps, PeopleSoft, SAP etc.
- Wizard-driven, auto-discovery
- Performance recommendations
- Dynamic API's for auto ticket creation
- Web-Services capable for B2B automation

### Group Messaging & Broadcast Center

- Alerts, News items and Portal Messaging
- Mass email broadcast capabilities
- Broadcast Center for pro-active support

