



EMS Pro Training Manual

Module 1 – Version 2.0.1

Author: David Ford
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INTRODUCTION

This manual is to be used referencing “EMS Module 1 – Orientation Manual”

UNDERSTANDING THE INTERFACE

Explain each of the sections in EMS namely:

Mailboxes,
My Enquiries,
Results,
Calendar,
Reports

INTRODUCTION TO THE WIZARD

The pages that follow we will look at each of the main pages in the Wizard.

ENQUIRY TRACKER

Enquiry Wizard - [OMPS9035222] EMS Server Application Error. Version 2.0.0.6

ENQUIRY TRACKER

The incoming email message does not have any embedded reference number tags.
Please review the email and select the appropriate action based on it's content.

This is a new Enquiry
This option should be selected if the Enquirer is asking a new question and is not referring to an existing enquiry.

Link to existing Enquiry
Use this option when the Enquirer refers to an existing enquiry.

Assign Enquiry to another mailbox user
Use this option to assign the popped enquiry to another mailbox user.

Assign to user:

< Back Next > Finish & Copy Finish Cancel

Three options exist:

THIS IS A NEW ENQUIRY

From the content of the email received you see that the enquirer is initiating a new enquiry.

LINK TO EXISTING ENQUIRY

If you see that the enquirer is referring to another enquiry but has neglected to include the enquiry reference use this option to link this correspondence with the applicable enquiry reference number.

ASSIGN ENQUIRY TO ANOTHER MAILBOX USER

Use this option if you need to refer the enquiry to another team member because of a particular skill set that user has. For instance the enquirer has corresponded in Xhosa and you are not familiar with that language or you are not up skilled in a particular process.

Remember that this should be done in accordance with the standard methods of operation in your department.

ENQUIRY LINKER

Find an Enquiry...

Reference No: [] [Clear]

Enquirer Name: EMS Server Application [] Start

Enquirer Email: dave@emspro.co.za [] Start

Enquiry Subject: [] Start

Agreement No.: [] Start [Find]

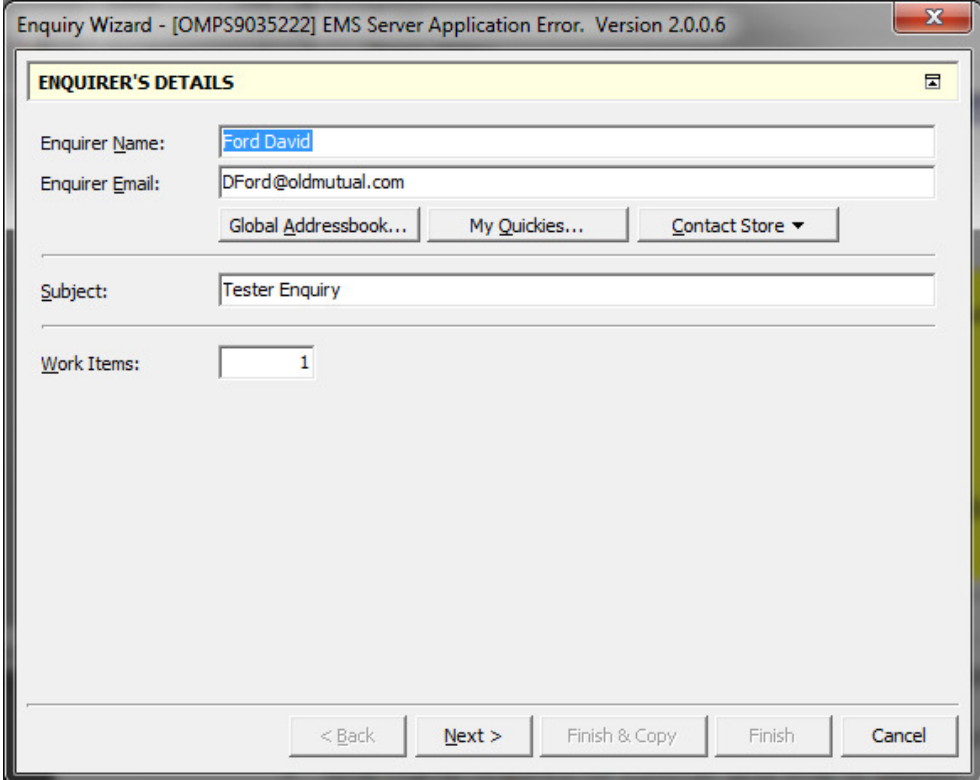
Enq.Ref.	Enquirer Name	Enquirer Email	Subject

[Select] [Close]

Here options are displayed to find the enquiry that you wish to link correspondence to.

Tip: If you need to refine your search use the main search function in EMS Pro to get the reference number and then copy it into the Reference No text input area. You need only capture the numerics as the reference number is unique to the database that your mailbox resides on.

ENQUIRER'S DETAILS



Enquiry Wizard - [OMPS9035222] EMS Server Application Error. Version 2.0.0.6

ENQUIRER'S DETAILS

Enquirer Name: Ford David

Enquirer Email: DFord@oldmutual.com

Global Addressbook... My Quickies... Contact Store ▾

Subject: Tester Enquiry

Work Items: 1

< Back Next > Finish & Copy Finish Cancel

This page gives you the opportunity to change who the enquirer is. Why?

Quite simple let's assume that this was forwarded from a third party and they will take no further part in this enquiry you would then change the enquirer to suit who you will be interacting with.

There are three buttons that allow you to get the address of the enquirer:

GLOBAL ADDRESSBOOK

This option displays the normal corporate address book.

Caution: There can be only one enquirer so don't add more than one person and don't cc or bcc anyone.

MY QUICKIES

This option gives you access to your personal repository of email addresses that you use.

CONTACT STORE

In certain situations you have parties that are not on your corporate address list and they need to be accessible to all the team members. You can store them in a database wide Contact store for quick use.

ENQUIRY ACTION

Enquiry Wizard - [OMPS9035222] EMS Server Application Error. Version 2.0.0.6

ENQUIRY ACTION

Select the appropriate action:

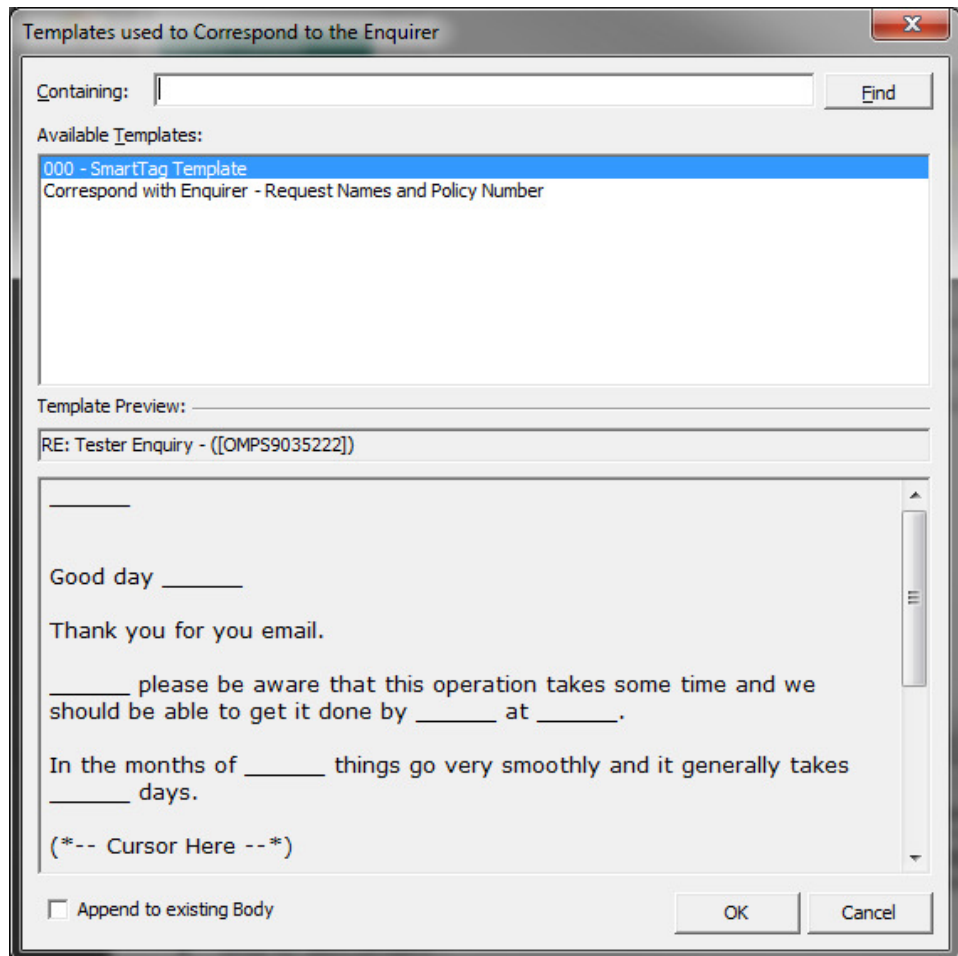
- Correspond with Enquirer by Email
- Respond to Enquirer by Email
- Correspond with other Medium
- Respond to Enquirer with other Medium
- Complete Enquiry
- Request Internal Feedback
- Forward Enquiry to another Department
- Escalate Enquiry to Manager
- Pend Enquiry
- Include Enquirer Feedback Email
- Make a New Enquiry
- Split Enquiry

Keep this Enquiry in my Enquiry List

< Back Next > Finish & Copy Finish Cancel

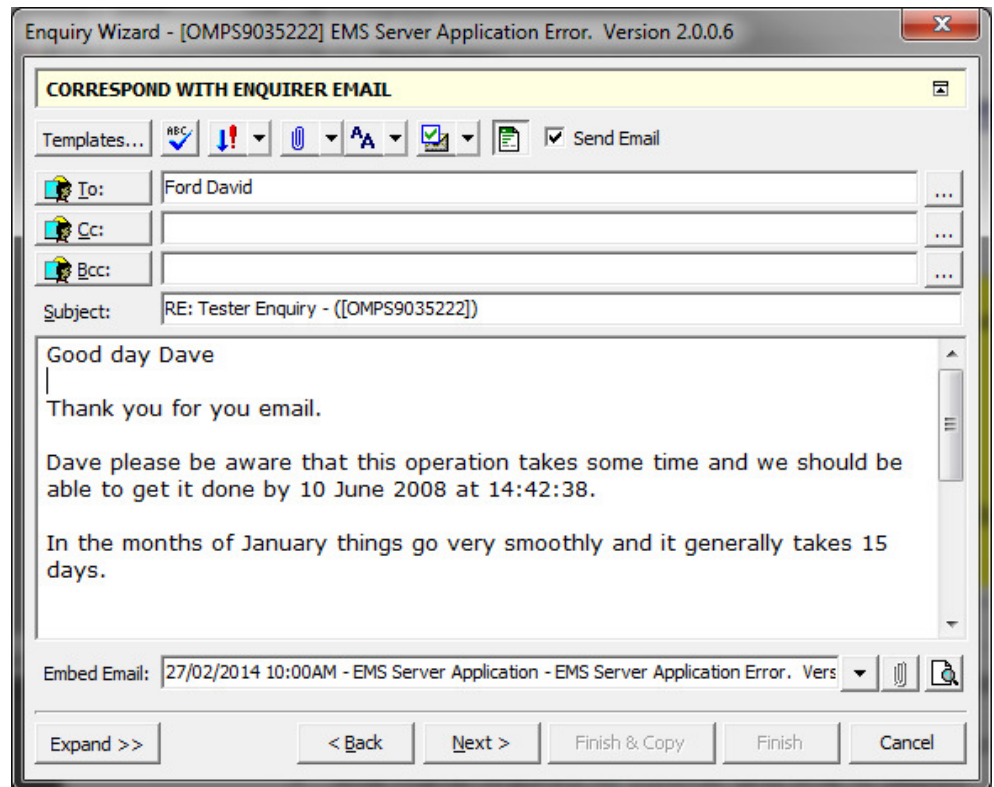
The enquiry action page is covered in the “EMS Module 1 – Orientation Manual “.

TEMPLATES



Templates are a great productivity booster so if you say the same thing 10 times a day then you should add a template. Usually you contact the EMS Support team who will add the templates needed for you and then associate them with the correct actions.

EMAIL INTERFACE



If you have used an email client this page should be largely self-explanatory however let's look at a couple of unique features in EMS.

Corporate address book is accessible by clicking on the To, Cc and Bcc buttons. Clicking on the contact person or the ellipse buttons opens the "My Quickies" section.

EMS Pro does not support rich text. While this is a limit it is also an advantage as it forces you to remain true to the corporate look of emails.

EMS Pro automatically selects the correct email to embed. This works as follows: It takes the first person in the To list and responds on the last email that that person sent you. If there are no emails from the person then the last email from the enquirer is used.

The advanced training manual includes other options that are available.

ENQUIRY EXPIRY AND PEND ALARM SETTINGS

Enquiry Wizard - [OMPS9035222] EMS Server Application Error. Version 2.0.0.6

ENQUIRY EXPIRY AND PEND ALARM SETTINGS

Enquiry Expiration: 10/04/2014 03:00:00 PM

Attach a reminder alarm to this enquiry

Alarm Prompt:
Tester Enquiry

Time: 03:43:00 PM

Custom: 09/04/2014

Quickies:

- Tomorrow
- Next Week:
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday

< Back Next > Finish & Copy Finish Cancel

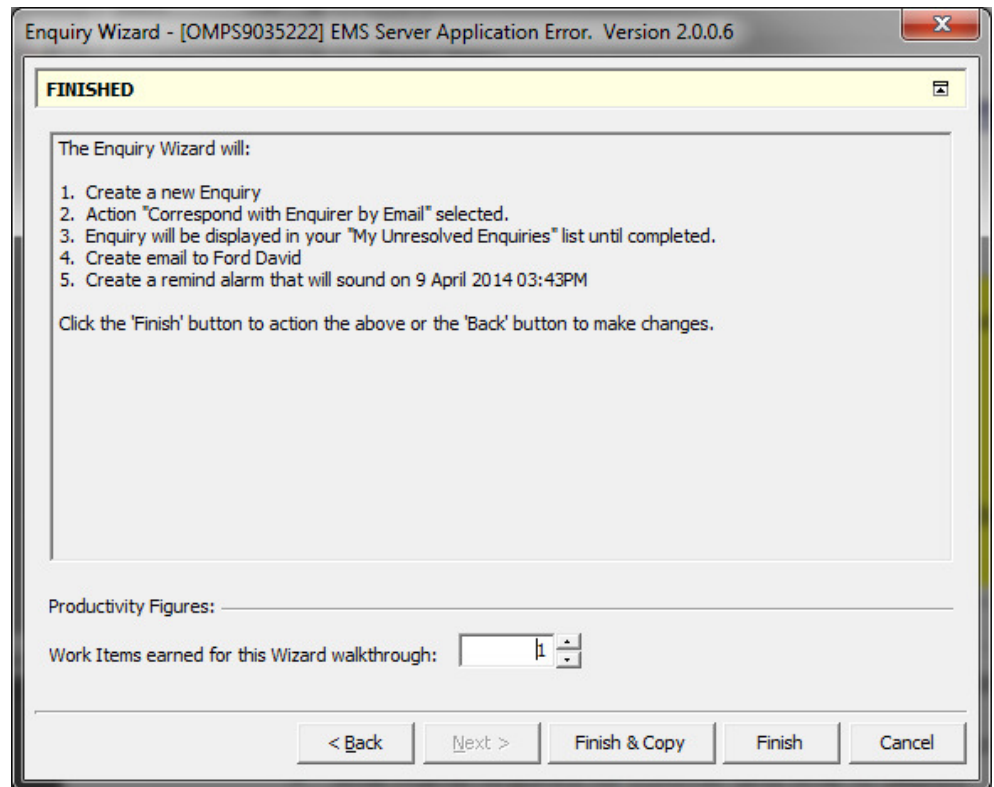
When any enquiry is placed in an unresolved state EMS Pro gives you the opportunity to diarise the next expiration date according to the promise you made to the Enquirer.

You can also include an personal alarm to remind you of something that needs to be done before the enquiry expires.

TIP: EMS Pro allows you to pend for whenever you need.

Warning: Don't pend enquiries when you won't be in the office!

FINISHED



This is the last step in the Wizard and will detail all the actions that the Wizard will do should you elect to click the Finish & Copy or Finish buttons. If you need to make changes use the Back button.

In some areas Finish & Copy is replaced with "Send to Process" which is a dedicated push to AWD feature. This functionality is only available in the retail affluent space at present.

PRACTICAL INTRODUCTION

We will now go through some practical Examples:

- Complete No Response
- Complete Respond
- General Pend
- Request Internal Feedback
- Forward Enquiry

SEARCHING IN EMS PRO

The screenshot shows the 'Search for...' dialog box in EMS Pro. It has two tabs: 'Enquiry' and 'Special'. The 'Enquiry' tab is selected. The dialog contains the following fields and options:

- Reference No.: [Empty] [St]
- Enquirer Name: [Empty] [St]
- Email Address: [Empty] [St]
- Subject Line: [Empty] [Con]
- Agreement No.: [Empty] [St]
- Owner: [Frontmost, Tracey] [...]
- Enquiry Status: [Received] [v]
- Received After: [09/04/2014] [12:00:00 AM]
- Received Before: [09/04/2014] [11:59:59 PM]
- Body Containing: [Empty] [Con]
- Return first [100] matches.
- Only search the mailboxes that I process/monitor
- Search Archive

At the bottom of the dialog are 'Search' and 'Close' buttons.

EMS Pro provides you with the necessary tools to rapidly narrow your result set to home in on the enquiry needed. You can specify multiple search criteria by ensuring that the checkbox to the left of the item you specify is selected.

The fastest method of searching is the enquiry reference number. Here you need only enter the numerics of the reference.

All items are defaulted to “starts with” (St) except for the “Subject line” which defaults to contains (Con).

The “Body Containing” option is hidden by default as it is extremely database intensive and this functionality needs to be motivated for.

By default EMS Pro only returns the first 100 matches. This behaviour can be changed as needed.

Lastly if you need to conduct a database wide search then uncheck “Only search the mailboxes that I process/monitor”.

ADVANCED TRAINING

Refer to the EMS Module 2 – Advanced Features for many features not covered in this session