



EMS Orientation Manual

Module 1 – Version 2.08

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UNDERSTANDING THE PROBLEM

For individual's mailboxes Outlook is almost certainly the best product available on the market today. However when used in a team environment against one or more shared "business" mailboxes the same can't be said.

Here are a few of the problems:

KEEPING TRACK

Emails come into the group mailbox but sent items go through the individual's sent items. To keep things together requires a lot of discipline from the staff manning the "business" mailbox.

PRODUCTION

Without a lot of effort, it is hard or almost impossible to keep a handle on how much work each person in the team is doing.

SERVICE LEVEL COMPLIANCE

Answering questions like "how many emails were replied to in 8 hours or less?" is not possible.

SECURE STORAGE

A business mailbox means that emails are of a business nature. Deletion should not be possible and a complete audit trail of who did what when needs to in place.

WHAT ARE THEY ABOUT?

Associating meta data with a client's query helps to identify trends and identify areas in the business that need to be addressed.

KEEPING THINGS TOGETHER

A customer sends in an email to a mailbox because they need something from the company. Subsequent emails pertain to the customer's initial request.

EMS has the concept of an enquiry and is the thread of one or emails. Individual emails are always associated with an enquiry and make up what is known as the Enquiry History.

This is achieved by embedding an enquiry reference number into the individual outbound emails that make up the enquiry. The easiest way to understand this is by way of an example.

Assume that EMS is processing the inbound mail associated with mailbox ABC. The mailbox ABC has what is known as a unique prefix and suffix. For this example let's assume the prefix is "[ABC]" and the suffix is "]". EMS looks for the prefix "[ABC]" in the subject and body of the email. If EMS finds it, EMS then looks for the suffix "]". Finally it checks the characters in between the prefix and suffix and if these are all numerics then it has found the number of the associated enquiry and it links the current inbound email to that enquiry.

It is now easy to see that a new enquiry is created when an email comes into the mailbox which doesn't have an existing enquiry reference.

Remembering that about 90% to 95% of people respond on the email that you sent them it is easy to see that the conversation chain works very effectively.

WHAT'S IN A STATUS

There are basically four actions that can be performed on any given email in a product like Outlook; Reply, Reply All, Forward and Delete. In EMS these actions are performed as a consequence of doing work (except for delete as EMS does not have a deletion function) but more importantly EMS introduces a number of statuses that fall into two categories; Unresolved and Completed enquiries.

Each status in EMS reflects the current state of an enquiry and gives the user an idea of what actions are likely to follow next.

UNRESOLVED STATUSES

RECEIVED

This status is reserved for new and as yet unworked Enquiries. It is not a user selectable status and the diarised point when the enquiry times out is preconfigured in EMS.

PENDING – CORRESPONDING

A user places an enquiry in this status when they need to get additional information from the enquirer. An example would be when an enquirer sends in a request but fails to include an agreement number. The user would need to get back to the enquirer to ask them for the agreement number and then diarise the enquiry for a day or so to give the customer time to get back with the relevant information.

PENDING – REQUEST INTERNAL FEEDBACK

This status is used when the user needs to send an email to a dependency. The dependency will get back to the user and then the user will get back to the enquirer. This status allows the user to diarise the enquiry to a point that falls in line with promises made to the enquirer.

PENDING – GENERAL

Should an instruction go via a different system (For instance a workflow system) or be totally time driven, an email asking for assistance may not be necessary. This is what this status is used for. As with all Unresolved statuses the user is required to diarise to a future point in line with the promise made to the enquirer.

PENDING – ESCALATED

This status is used when alternate actions have failed and it is necessary to escalate the enquiry to the user's manager or the manager in another area. As with all Unresolved statuses the user is required to diarise to a future point in line with the promise made to the enquirer.

HAS NEW MESSAGE

This is a catch all enquiry status. It cannot be selected by the user and the timeout is preconfigured by EMS. It is used when an enquiry has been placed in any one of the Completed statuses and a new inbound email has been received waking the enquiry up. It is as important as any other of the Unresolved statuses and can be

thought of as a “Received” status except that the enquiry has other emails in its history.

USER PROCESSING

This status indicates that the enquiry in question has been locked by a user who is working on it.

COMPLETED STATUSES

COMPLETED – RESPONDED

The enquiry has been completed and an answer has been sent to the enquirer via email.

COMPLETED – NO RESPONSE

The enquiry has been completed without an email being sent to the enquirer. This is useful when a client says thanks or when spam or non-actionable emails are received.

COMPLETED – FORWARDED

The enquirer has sent an email that is totally out of scope for the current mailbox. The work has been forwarded to the correct area and the enquiry has been completed.

COMPLETED – REASSIGNED

An enquiry is placed in this status when the email that it contains is actually part of another enquiry. The user has the ability to link the email to the other enquiry and the current enquiry then gets this status.

KEEPING COMMUNICATIONS SEPARATE

EMS separates communications between the user and the enquirer and communications with other parties. There are good reasons for this behaviour not least is that if the user exposes their internal resource to the enquirer it won't take long before the enquirer goes directly to that person.

This behaviour is achieved by the creation of two emails under a specific condition. This condition coincides with the following statuses:

Pending – General,
Pending – Request Internal Feedback,
Pending – Escalated and
Completed – Forwarded.

All of the above statuses are directed at parties other than the enquirer so EMS asks that the enquirer be kept in the picture with respect to the delivery on their request. This is known as the enquirer feedback email.

ENQUIRY COLOURS

Colours are the easiest way to rapidly reflect a change either for the better or worse. Take the example of a traffic light; green signifies that all is okay, orange that change is a foot and red signifies that traffic should stop. EMS has incorporated this paradigm in for the SLA compliance and mailboxes that are well managed have a team that operate by ensuring that the colours are well managed.

For easy maths let's assume that a mailbox has a contracted response time of 2 hours, i.e. an enquirer sends in an email and the users behind the mailbox in question have two working hours to get back to the enquirer with either the answer or a status and/or delivery update.

On receipt of the inbound email from the enquirer, EMS calculates the 2 hour expiry point and then divides the time in 3. The first is for $\frac{1}{3}$ the time and during the first 1 hour the enquiry is green. The second is for the period 1 hour to $1\frac{1}{3}$ hours and in this phase the enquiry is orange. The final $\frac{1}{3}$ of the cycle in this case from $1\frac{1}{3}$ to 2 hours the enquiry goes red. Finally the enquiry goes purple if the SLA is not met. This colour coding enables the users to effectively manage all enquiries just by actioning the different colours appropriately.

QUICK RECAP

EMS groups emails into enquiries and this is achieved by embedding the enquiry reference number in all outbound emails. Enquiries are grouped into Unresolved and Completed enquiries and then each of these has corresponding statuses that reflect where the enquiry is right now. Lastly colour coding enables the users to effectively manage what needs to be attended to and in what order.

TOUR OF THE INTERFACE

EMS was designed to look and feel like most Windows applications around 2005. An Outlook style bar has buttons that denote the sections of the system.

My Enquiries	This section is the space reserved for the user's owned enquiries.
Results	Displays the results of searches conducted against EMS.
Mailboxes	Displays unresolved enquiries for mailboxes that the current user has access to.
Calendar	This section is where a user would log their downtime for system outages, training, meetings, etc.
Reports	These are real time reports which cover production and email traffic.

The easiest section to start with is the "Mailboxes" section.

"MAILBOXES" SECTION

In the top panel are the unresolved enquiries. The middle panel contains the individual emails that make up the enquiry history of the enquiry highlighted in the top panel and finally the bottom panel is the preview of the currently highlighted email.

Below the last panel there are tabs that allow the user to switch between mailboxes that they are authorised to view.

Let's turn our focus to the top panel (the Enquiries panel). Notice the colours correspond to the green, orange, red and purple discussed earlier.

If one looks at the order in which the enquiries are displayed. Notice they are ordered from the most recent at the top to the oldest at the bottom. This section is often used when a user is on the phone with someone querying something they sent through so it is advantageous to have the newest at the top much like the enquiry history panel displays the most recent at the top.

Next let's focus our attention on one of the enquiries and let's look at each of the columns.

Enq. Ref.	Displays the enquiry reference which is made up of prefix, enquiry number and suffix.
Owner	Displays the user who has this enquiry assigned to them.
Enquirer Name	This defaults to the name of the person who sent in the first email that created the enquiry. This may be changed by the user and in certain circumstances should be changed.
Received	This is the date and time that the first email arrived triggering the creation of the enquiry. It will also correspond to the date and time the enquiry was created when a user creates an enquiry themselves.

Expiry	The date and time that the current enquiry will expire (or go out of SLA).
Status	Shows the current status of the enquiry
Subject	This defaults to the subject of the first email that created the enquiry. Again it can be changed by the user if needed.
Completed	Shows the date and time the enquiry was completed.
Items	An indicator as to the number of unique work items for this enquiry. This is set by the user and will be covered later.

Just above the top panels column headers in the left of the row it has a button with a down arrow and (by default) “All Uncompleted Enquiries” shown to the right. This is used to filter according to a specific Unresolved status.

Be careful:

All statuses are equally important and by filtering on anything other than “All Uncompleted Enquiries” you may not be aware of enquiries going out of SLA.

“MY ENQUIRIES” SECTION

Click on the “My Enquiries” button in the Outlook bar.

This section is very much like the “Mailboxes” section except for the “Queue Status” panel.

The “My Enquiries” section displays a list of Enquiries owned by the user. The “Queue Status” panel provides snapshots of the mailboxes that the user has access to and it shows a summary of all the unresolved enquiries sitting in each mailbox not just the currently users enquiries owned. The idea of the “Queue Status” report is to get a team to pull together focused on the goal of keeping the mailboxes in check and to raise the necessary alarms if they are getting too busy.

Tip:

Notice at the bottom of the queue status report there is a bar which shows the age analysis of the mailbox. If your version of EMS doesn’t have this bar visible go to “Tools” menu then “Options” then “My Enquiries” and check “Display SLA Cycle Bar in Queue Status Report” select “OK” and finally hit F5 to refresh the display.

Let’s look at some of the less obvious differences between the “My Enquiries” and “Mailboxes” sections. Remember that this section filters enquiries around a specific user’s “My Enquiries” (enquiries owned by them). Look closely at the top Enquiries panel. Notice how the enquiries are now from the oldest at the top to the newest at the bottom. In fact they are from the highest priority to the lowest priority. If the enquiries all have the same priority it places the oldest enquiry at the top because it should get the user’s attention first.

Another difference is that the list of enquiries can span multiple mailboxes. “My Enquiries” is like a user’s queue of outstanding work.

The tabs at the bottom have also changed meaning. In the “Mailboxes” section they were used to switch between mailboxes. They now allow the user to switch between “Unresolved” and “Completed” enquiry views.

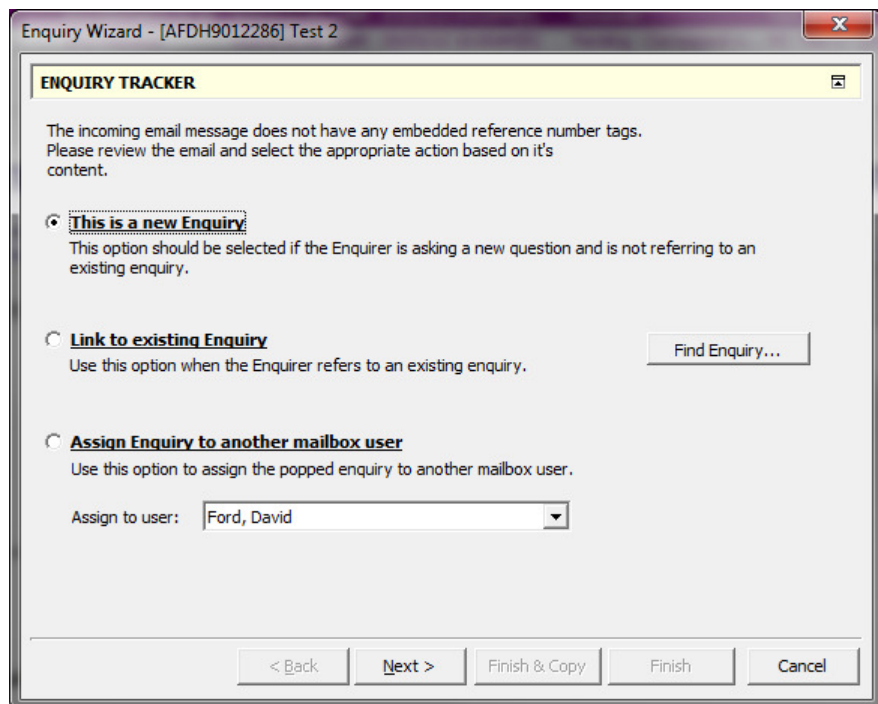
The other sections will be covered in a future document release but it is important to remember that there is an online help facility available from the “Help | Contents...” menu options.

WORKING EMS

The majority of work done in EMS is via the Wizard. The Wizard is accessible by double-clicking an enquiry in the top enquiry panel in the “My Enquiries” section (alternatively one can right click on an enquiry and then select “Activate Wizard...”). The Wizard guides the user through the process and displays the next screens relevant to the previous selection made by the user.

Let’s do this by finding an enquiry in the Received status in the Enquiries pane and then double-click on it (if you don’t have one click on the “Pop” button and then double-click it).

The Wizard will open.



The first page displays three options. The first is used most often and signifies that this is a new enquiry.

The second option enables the process to link this enquiry’s emails to another enquiry.

The third and final option allows the user to assign this enquiry to another team member.

Select the “This is a new Enquiry” and click “Next”.

Enquiry Wizard - [AFDH9012286] Test 2

ENQUIRER'S DETAILS

Enquirer Name:

Enquirer Email:

Subject:

Work Items:

The Enquirer's Details page is displayed and it is here that the user can change who the enquirer is as well as what is contained on the subject line for the enquiry, this in turn is used as the subject line in subsequent emails. The last point to cover is Work Items. Certain areas have standard operating procedures (SOP) and one of the points covered is how to account for emails that contain more than one item of work. Users should refer this matter to their manager for the appropriate guidelines.

Click "Next"

Enquiry Wizard - [AFDH9012286] Test 2

M.I.S.

Contract Number

Intermediary Code

Product Type

Enquiry Classification

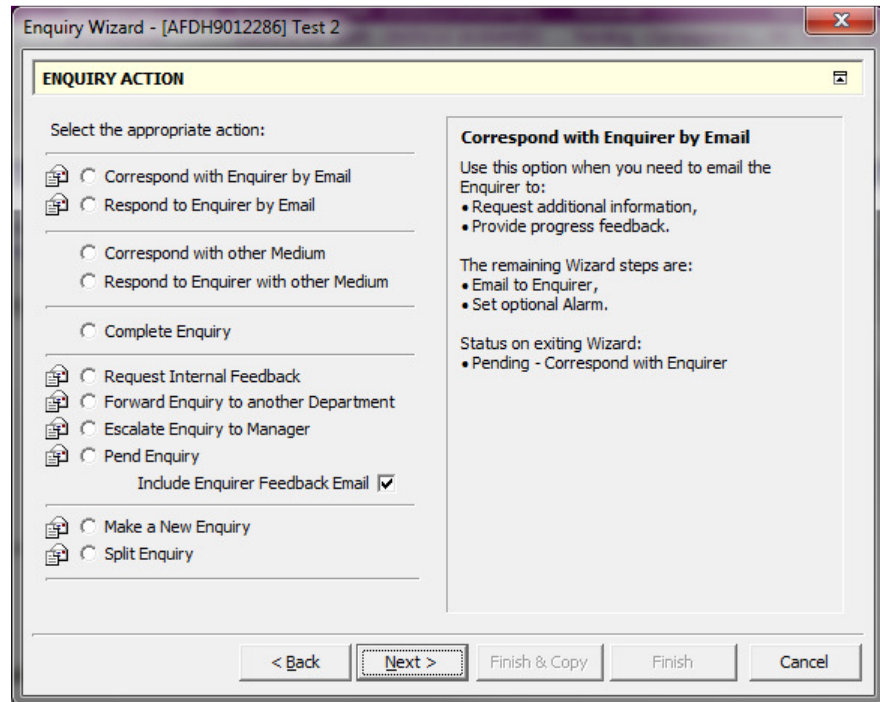
Enquiry Source

The next page is the M.I.S. data page. The screen shot above is an example of a custom MIS block and this usually differs from area to area according to the specific reporting requirements.

Note and Warning:

Numerous systems use data captured here for analytical purposes and accuracy is of paramount importance. Please capture information as accurately as possible and where there are gaps ensure to report these to your manager.

Complete all MIS dropdowns and then click "Next"



This page is the most complex and confusing page for all new EMS users because unlike Outlook where you have Reply, Reply All, Forward and Delete, EMS asks you to think which status is the most appropriate for the action needed at this point.

Tip:

Hold your mouse over any of the radio button options and you will see a detailed explanation to the right of what the next steps are.

Let's run through the options quickly.

Correspond with Enquirer by Email

This option is used when the enquirer has given insufficient information to action their request and the user needs to get back to the enquirer to get the information to be able to assist them. It will send an email to enquirer and ask the user to diarise a new expiration point in the future.

Respond to Enquirer by Email

This option is used when the user has completed all the work and is ready to compile an email with the answer to the enquirer's questions. This option will send an email to the enquirer and will then place the enquiry in a completed status.

Correspond with other Medium

This option is functionally equivalent to "Correspond with Enquirer by Email" except that another medium is used. Medium categories catered for are Fax, Letter, Meeting, Phone and Task. While meeting and task aren't really mediums they do fit well here.

Respond to Enquirer with other Medium

This option is functionally equivalent to "Respond to Enquirer by Email" except that another medium is used. Medium categories catered for are Fax, Letter, Meeting, Phone and Task. While meeting and task aren't really mediums they do fit well here.

Complete Enquiry

This is the closest to a deletion in EMS. It completes the enquiry without sending an outbound email.

Request Internal Feedback

This option is used to send a request for assistance from a dependency or from some backend processing area. The enquiry remains open and the user is expected to get back to the enquirer after the dependency has provided confirmation of the completion. By default this option sends a feedback email to the enquirer, an email to the dependency person/department/company and asks the user to diarise a new expiration point in the future in accordance with any promises made to the enquirer in the feedback email.

Forward Enquiry to another Department

This option is used when a piece of work has come into the wrong area and needs to be routed to the correct servicing area. The enquiry is placed in a completed status. By default this option sends a feedback email to the enquirer informing them that they have sent in a request to the wrong area, an email to the department/company that is tasked to perform this request and finally it completes the enquiry.

Escalate Enquiry to Manager

This option is used to send an escalation request when a request for assistance from a dependency or from some backend processing area failed. The enquiry remains open and the user is expected to get back to the enquirer after the manager escalated to has provided confirmation of the completion. By default this option sends a feedback email to the enquirer, an email to the manager handling the escalation and asks the user to diarise a new expiration point in the future future in accordance with any promises made to the enquirer in the feedback email.

Pend Enquiry

This option is also known as a general pend. It is used when an activity that needs to occur is purely time based (“I will get back to you when the debit order has gone through”) or when the instruction for assistance/work is created on some other system. . The enquiry remains open and the user is expected to get back to the enquirer after the dependency has provided confirmation of the completion or the time based event has occurred. By default this option sends a feedback email to the and asks the user to diarise a new expiration point in the future in accordance with any promises made to the enquirer in the feedback email.

Include Enquirer Feedback Email

“Request Internal Feedback”, “Forward Enquiry to another Department”, “Escalate Enquiry to Manager” and “Pend Enquiry” all have one thing in common, they direct an instruction to someone other than the enquirer. History has shown that keeping the enquirer out of the servicing loop is not a good idea so providing a feedback email with expected delivery dates is very important. There are however times when this action may not be necessary. For instance the user has just emailed the enquirer with an estimated delivery date and the enquirer emails back saying thanks and look forward to the answer. Sending another feedback email may not be necessary.

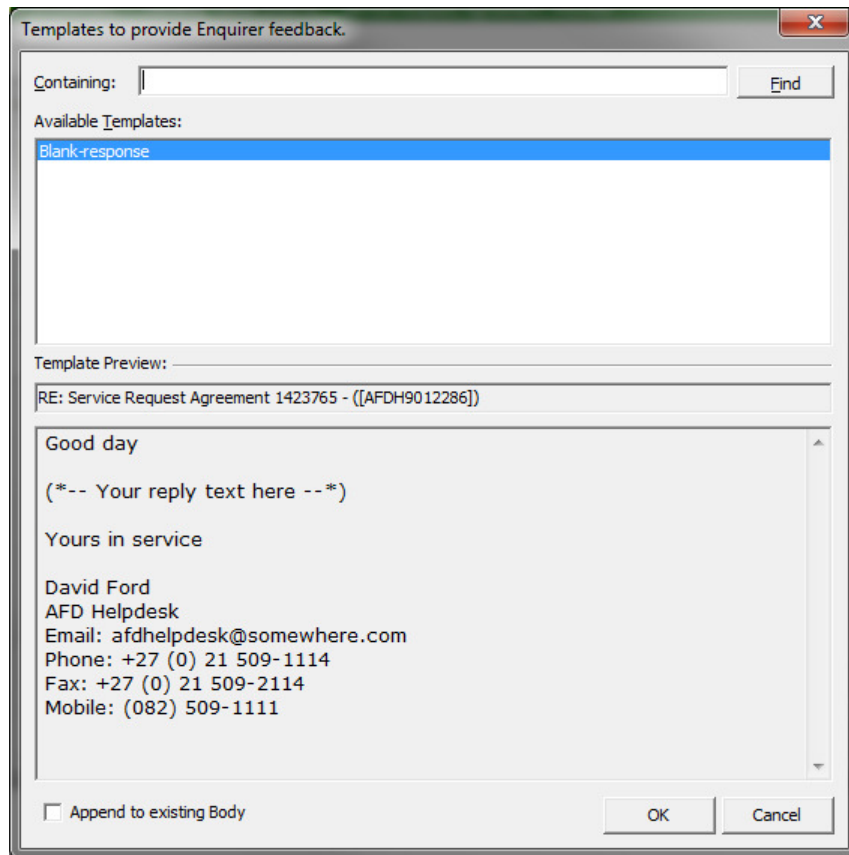
Make a New Enquiry

Sometimes an enquirer may initiate another service request and reply on an old enquiry reference number. This option provides the process needed to create a new enquiry which can be handled as its own thread.

Split Enquiry

This option takes an enquiry and makes a full duplicate copy of it. Experience has shown that this can be very confusing at first and it is advisable not to use this option. Some areas used this option for breaking enquiries into single work items. If this is the intention then it is suggested that one opt for work items instead.

For this example let’s walk through a “Request Internal Feedback” process which will demonstrate all the activities. Click this option and then click “Next”.



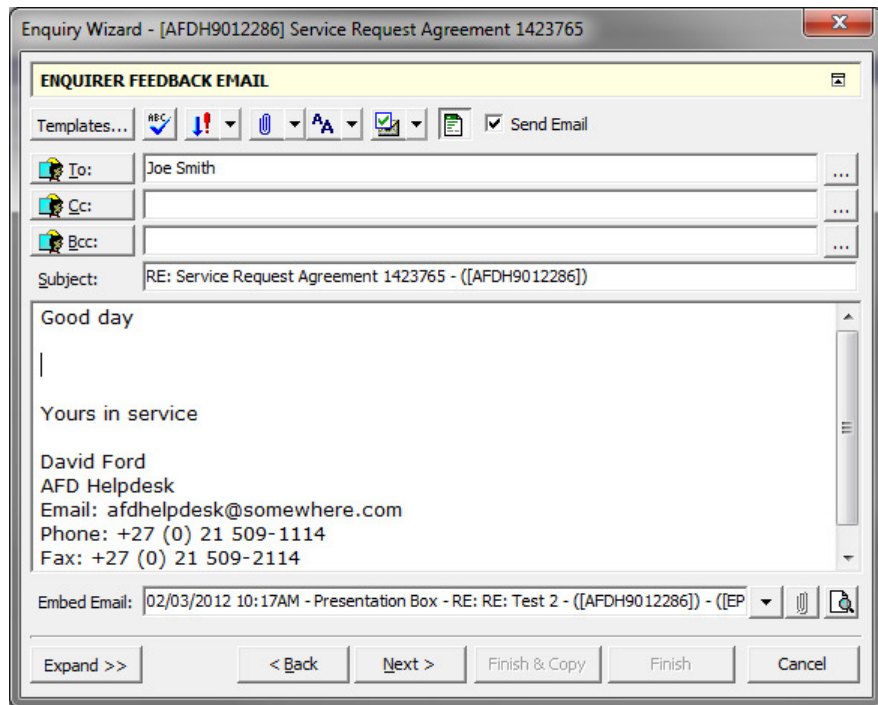
EMS has email templates that can be customised to suit a client's needs. Templates can be associated with the "type" of person you are directing the email to as well as which mailboxes to associate them with. The end reckoning is if a user is typing the same email over and over chances are a template is needed.

Tip:

To have new templates created please log a call with "EMS Support" with the template text. Remember to get sign-off from your manager for the inclusion of any new templates and to CC them on all new template requests logged with EMS Support.

Notice that because we have gone down the "Request Internal Feedback" path the first set of templates presented is for the "Enquirer Feedback Email".

Pick the template most suited and click "OK".



By default this email will be directed to the Enquirer as its title is “Enquirer Feedback Email”.

Notice that the email is pre-addressed To the enquirer and the template has been put into the body section and the reference number is included in the subject line.

If needed other parties can be included in the To, CC and BCC address areas. Remember to keep internal communications separate from external enquiry communications.

Click “Next”.

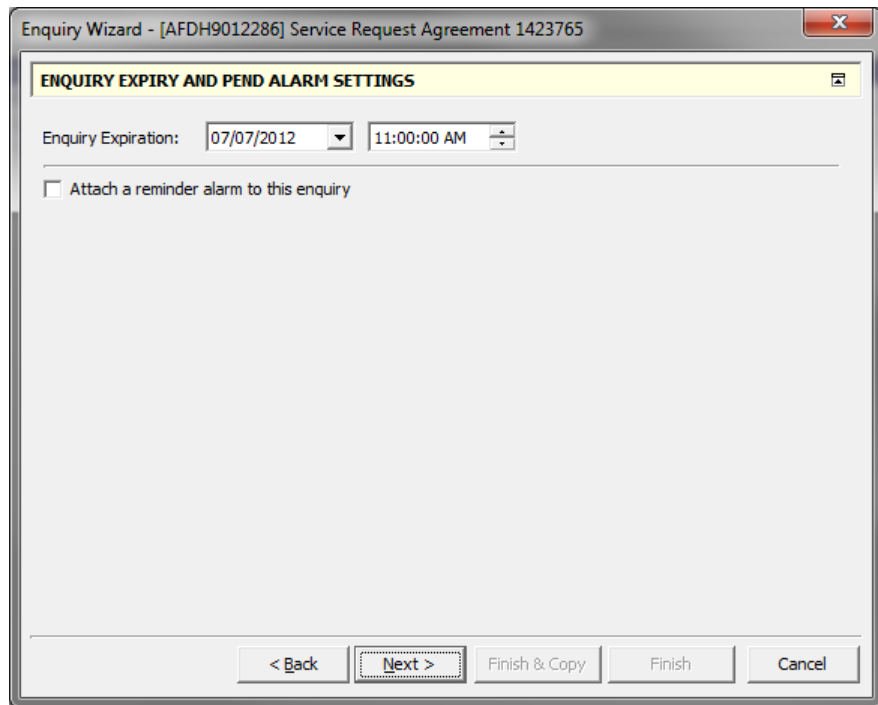
The same template selector as before is displayed except that the title now reads “Templates to Request Internal Feedback”

Select an appropriate one and click “OK”.

The same email page is displayed except that it is now labelled “Request Internal Feedback Email”. Notice that all merging is done except that there is no email address. This you will need to provide as EMS does not know who you want to refer this instruction to.

Click on the “To” button and pick the appropriate person or mailbox.

Click “Next”.



The “Request Internal Feedback” process falls into one of the pending statuses and as such always displays this diary page. EMS is asking the user to set the new expiration point. Pick the point in the future that coincides with the time expectations communicated with the enquirer in the feedback email.

A user can also attach an additional alarm that will notify them before the fact. This alarm is optional.

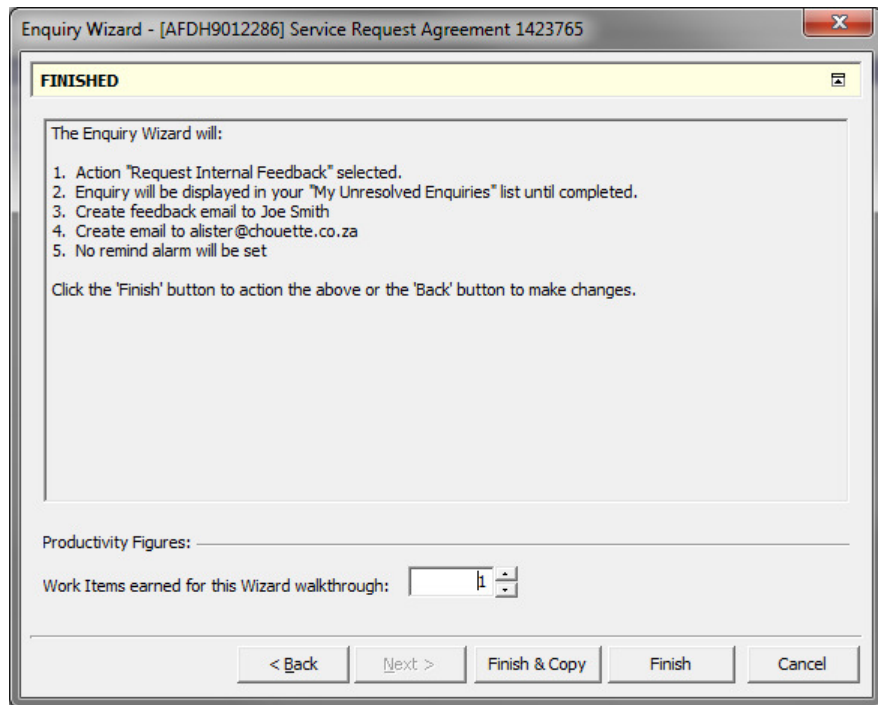
Tip:

If your time does not display the AM and PM settings contact EMS Support.

Warning:

Don't diary enquiries for after hours or at times when you know that you won't be working EMS. EMS will expire these enquiries and this will reflect as out of SLA enquiries.

With the correct expiry time selected click “Next”.



Up till now all that has happened is that the Wizard has queued the instructions for the user.

By clicking on the "Finish" or "Finish & Copy" buttons the instructions will be performed.

Finish just does the instructions

Finish & Copy does the instructions and places a prepared plain text rendering of the emails on the clipboard ready to be inserted into AWD as a source created against the applicable policy numbers.