

Microsoft Partner Support Community

Partner RSC Agent Training



Released: June 2014

Table of Contents

Course Overview	1
Microsoft Partner Support Community Overview	2
Microsoft Partner Support Community	2
Thread Management Tools	3
Thread Management Process	6
Community Platform Server (CPS).....	9
Access and Navigation	10
Logging into CPS.....	10
CPS Navigation	11
Partner Membership Forum	13
Partner Membership Forum Homepage.....	13
Thread List Page.....	13
Ask a Question.....	16
User Profile Page	17
Threads.....	19
Search Results	19
Thread Layout and Content.....	21
Moderator Tools and Filters	26
Community Agent Tool (CAT)	29
The CAT Homepage.....	30
CAT Cards	30
Preferences and Profile Menus	30
Announcements.....	31
Alerts	31
Help.....	31
The Forums Page.....	33
View the Forums Page	33
CAT Toolbar.....	33
Forum Page Sections	34
Search Profiles.....	36
The Threads List.....	38
Threads List Icons and Columns	38
Actions	39

Columns.....	39
Deleted Threads	43
Viewing Multiple Threads	44
Preferences and Profiles	45
My Preferences (Alerts)	45
My Profile	46
Tickets.....	48
Automated Tickets	50
View the Team Tickets List.....	50
Take Ownership of a Ticket.....	51
View the My Tickets List.....	52
The My Tickets List	54
“Search By” Options	55
Customizing the Tickets List Columns.....	56
Interpreting Tickets	57
Ticket Documentation Tools.....	57
Ticket Actions	62
Tasks.....	66
What Is a Task?	66
My Tasks	66
View the Task.....	67
Accept the Task.....	68
Reject a Task	70
Create a Task.....	70
Closing Tasks	71
The Labor Timer.....	72
Labor Timer Overview.....	72
Idle Time Out	74
The Labor Center.....	75
Overview.....	75
Labor Category.....	76
Add Labor	76
Review: Thread Management Process.....	77

Course Overview


This course explains the new tools for managing the Microsoft Partner Support Community – both the internal CAT (Community Agent Tool) and the external CPS (Community Platform Server). Upon tool migration, support for Program questions will be provided by RSCs in up to eleven languages (it is currently English only).


Course Objectives

After completing this course you will be able to:

- Explain the thread management process
- Navigate and explain how to use CPS (Community Platform Server), the Partner-facing tool which hosts the forums
- Navigate and use CAT (Community Agent Tool) which RSC Agents use to respond to and manage Partner queries (threads)

The following icons will be used throughout the instructor’s notes:

 Helpful instructor information

 Information to be shared with CSRs

Course Timing

<i>Microsoft Partner Support Community Overview</i>	<i>10</i>
<i>Community Platform Server</i>	<i>30</i>
<i>Community Agent Tool</i>	<i>90</i>
<i>Review</i>	<i>25</i>
<i>Assessment</i>	<i>60</i>
<i>Survey</i>	<i>15</i>
<i>TOTAL</i>	<i>3 hours 50 minutes</i>

IMPORTANT NOTE:

Because there will be no VKB when this training is released (or probably for some time after), this PRINTED course document will be used as a reference for RSC Agents to use until they become accustomed to using the tool. Be sure they print it out and take notes on it, and use it to answer the assessment.

Also, the URL for CAT is not currently known. The CPS address is <https://mspartner.microsoft.com/en/ca/Pages/Support/online-technical-communities.aspx>, though you must change the “en/ca” section to your country. This is for the NEW portal only (Argo). The Microsoft Partner Support Community for the old MPN Portal is <https://partner.microsoft.com/global/40014662> (global version).

Microsoft Partner Support Community Overview

This section should take approximately 10 minutes to complete.

This brief lesson provides a high-level view of the Microsoft Partner Support Community and the online environment, including the tools that RSC Agents and Partners use.

Lesson Objectives

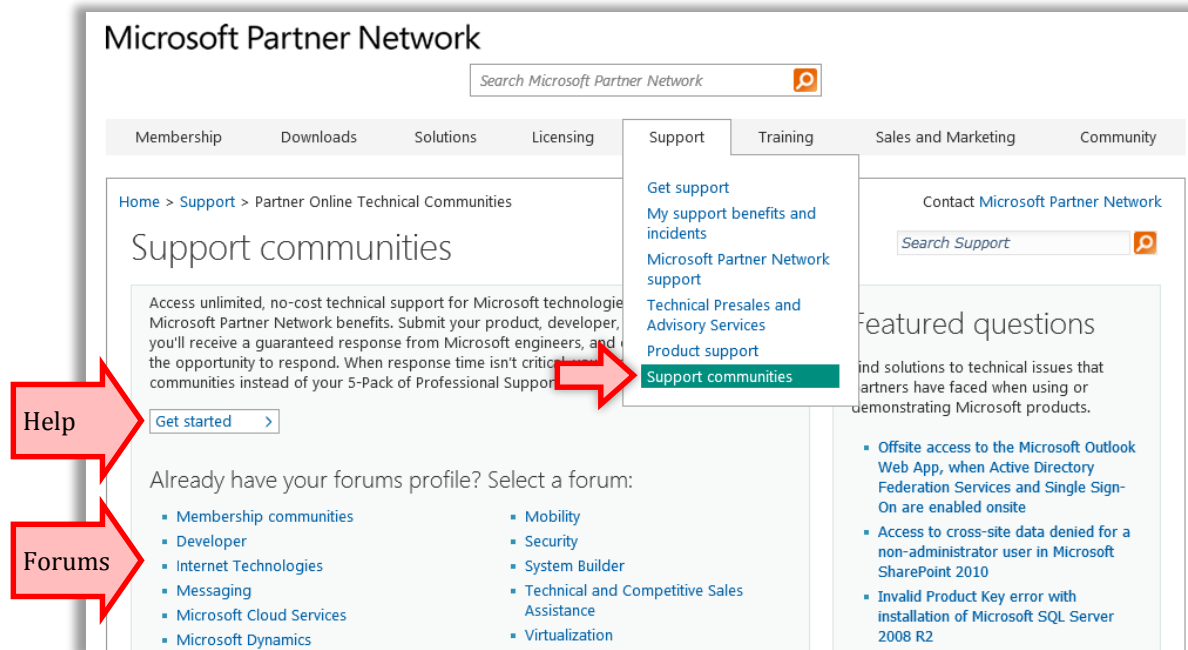
After completing this lesson you will be able to:


- Explain the high-level thread management process
- Describe Community Platform Server (CPS), the tool that Partners use to ask questions (create threads)
- Describe Community Agent Tool (CAT), the tool that RSC Agents use to manage Partner questions (threads)

Microsoft Partner Support Community

This is a private online community where Partners may ask and respond to questions posted by other Partners. Various teams within Microsoft monitor these forums and provide responses to these questions as well. Partners may access the support community forum and guidance pages from the Support section in the MPN Portal.

Information on MPN Portal



 *Information to be shared with CSRs*

Why is this community particularly beneficial to Partners?

1. *The Microsoft Partner Support Community is only viewable by Microsoft and other Partners. By contrast, the MSDN and TechNet forums are publicly indexed by search engines. Partners may post things in the Support Community that they might not feel comfortable posting in a public environment.*
2. *Every post to the support community is guaranteed to receive a response – and has a guaranteed initial response time (SLA) – from Microsoft support professionals.*

RSC Agents globally will now participate in supporting this community.



Helpful instructor information

For your information, the NA region has previously supported this community using tools that are no longer being used as of this training.

What are two benefits provided to Partners by the Microsoft Partner Support Community?

1. _____

2. _____

Can you think of a benefit to Microsoft?



Information to be shared with CSRs

See if agents can think of a response (they might come up with something in addition, but be sure to mention): This community provides a place for Partners to search for existing answers to their questions before contacting Microsoft support, which reduces the amount of chat and calls that come in, and potentially provides Partners with an immediate response to their questions.

Thread Management Tools

There are two tools used to create and manage Microsoft Partner Support Community threads. We will look at them briefly in this lesson before examining each one in more detail.

But first, let us review one definition. What is a **thread**?




Information to be shared with CSRs

A thread consists of an original post and all associated responses to that post. In these forums, a Partner generally begins a thread by asking a question, and an RSC Agent (or another Partner

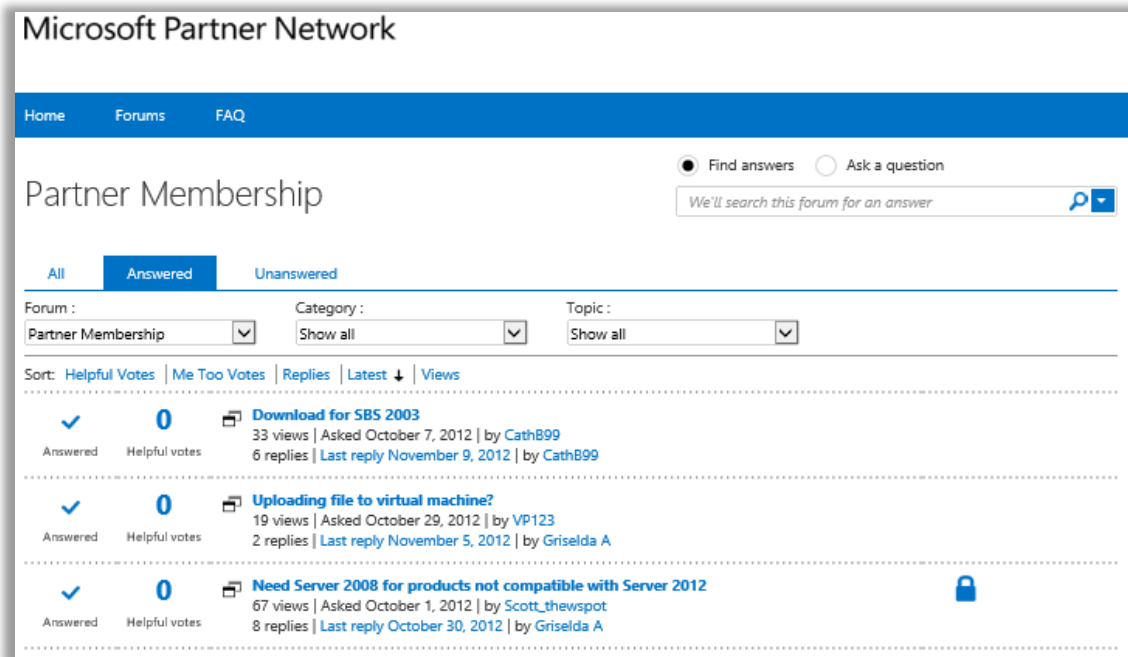
in the community) responds to this question, which adds a post to the thread. Make sure agents understand that a thread is not simply one post – it includes all responses to that post.

Write the main purpose of each tool below as your instructor describes them.

Community Platform Server (CPS)

 Information to be shared with CSRs

Community Platform Server, referred to from now on as CPS, is the online tool that Partners use to create, respond to, and search for threads in the support community. Threads are divided into forums, categories, and topics. Partners may post questions here, or they may search for threads that other Partners have posted in order to see if their question has already been answered. RSC Agents must know how to use it in order to assist Partners, but they do not need to use this tool unless they are posting a thread themselves (for example, an announcement).



The screenshot shows the Microsoft Partner Network forum interface. At the top, there are navigation links for Home, Forums, and FAQ. Below this is a search bar with options to 'Find answers' (selected) or 'Ask a question'. The main heading is 'Partner Membership'. There are filters for 'All', 'Answered' (selected), and 'Unanswered'. Below the filters are dropdown menus for 'Forum' (set to 'Partner Membership'), 'Category' (set to 'Show all'), and 'Topic' (set to 'Show all'). There are also sorting options: 'Helpful Votes', 'Me Too Votes', 'Replies', 'Latest' (selected), and 'Views'. The main content area displays a list of threads, each with a checkmark indicating it is answered, a '0' for helpful votes, and a title. The threads listed are:

- Download for SBS 2003**: 33 views | Asked October 7, 2012 | by CathB99. 6 replies | Last reply November 9, 2012 | by CathB99.
- Uploading file to virtual machine?**: 19 views | Asked October 29, 2012 | by VP123. 2 replies | Last reply November 5, 2012 | by Griselda A.
- Need Server 2008 for products not compatible with Server 2012**: 67 views | Asked October 1, 2012 | by Scott_the_wspot. 8 replies | Last reply October 30, 2012 | by Griselda A.

Used mainly by: _____ Partners

Purpose: _____

Partners post, search for, and reply to threads here.


When would RSC Agents use this tool?

RSC Agents will use this tool when posting a thread in CPS – this would usually be an announcement for the forum.

CPS URLs

- <https://mspartner.microsoft.com/en/ca/Pages/Support/online-technical-communities.aspx>. This example shows the Canadian site – for the site in your area you must remove “EN/CA” and replace it with your country’s information. Note that this is for the new (redesigned) MPN portal only.
- The Microsoft Partner Support Community for the old MPN portal is <https://partner.microsoft.com/global/40014662> (global version). In this site, the forum is referred to as Partner Online Technical Community (POTC).

Community Agent Tool (CAT)

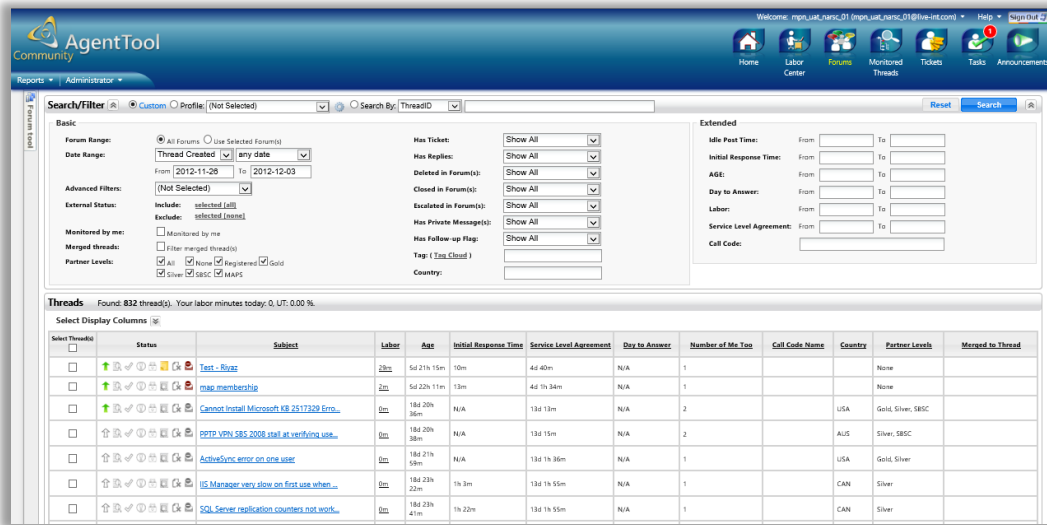
 Information to be shared with CSRs

Community Agent Tool, referred to from now on as CAT, provides all the functionality RSC Agents need in order to manage threads in CPS. This is why agents do not need to use CPS, other than to initiate a thread themselves. As the second screenshot shows (the Forums page), this tool has a much more complex interface that gives RSC Agents the ability to search for, filter by, and manage threads in a variety of ways. (The agents do not have to be able to read the information in the screenshot – it is just an example of the higher level of information available in CAT. They will see this screen later in more detail).

Main page



Forums page



Used by: _____ RSC Agents only

Purpose: _____

RSC Agents use this tool to manage the threads that Partners posted in the CPS tool.

The CAT URL (website link) is not yet known.

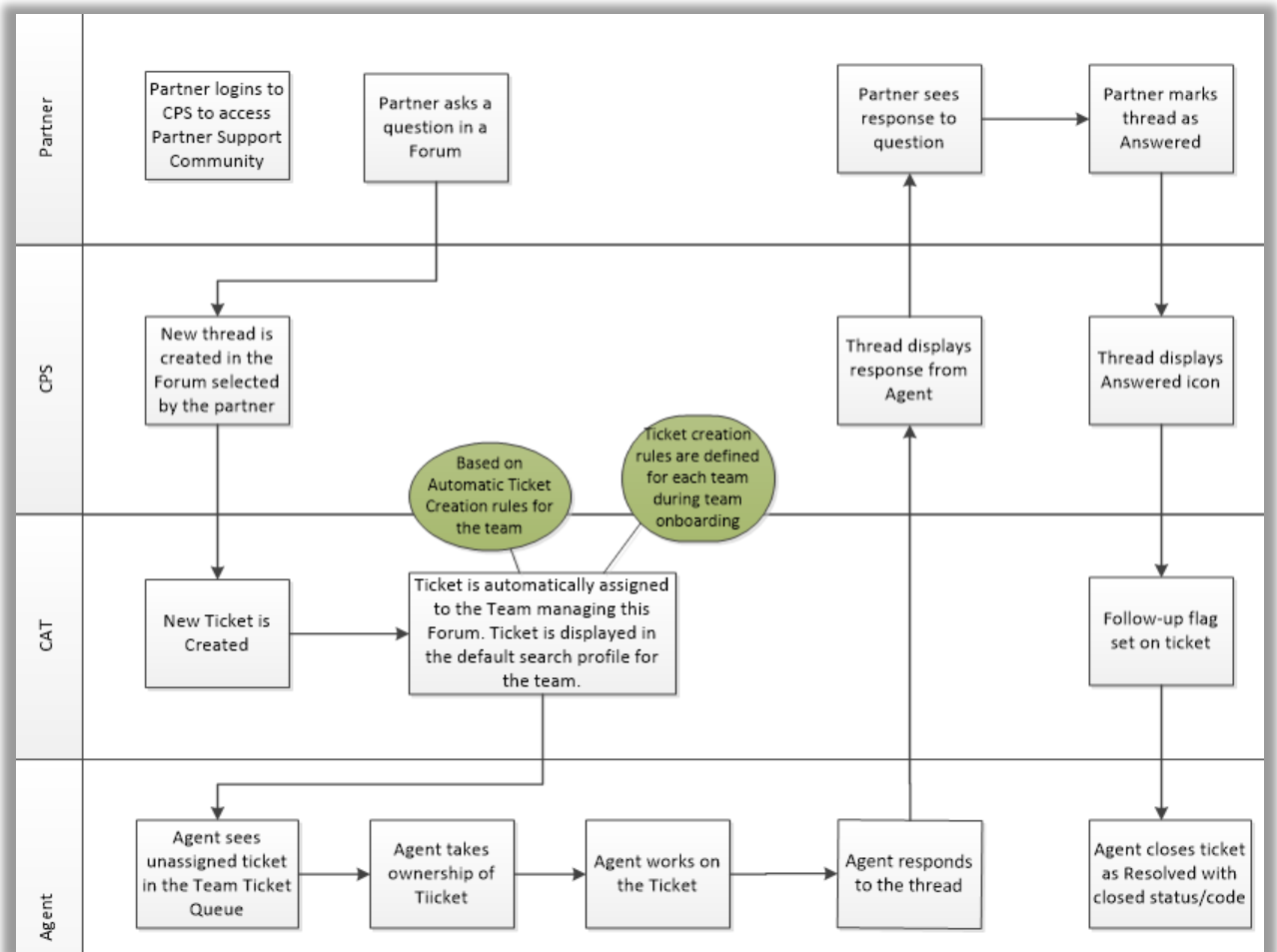
Thread Management Process

These two diagrams represent the overall thread management workflow, which includes the Partner, the RSC Agent, and the two thread management tools (CPS and CAT) that you will be introduced to shortly in more detail.

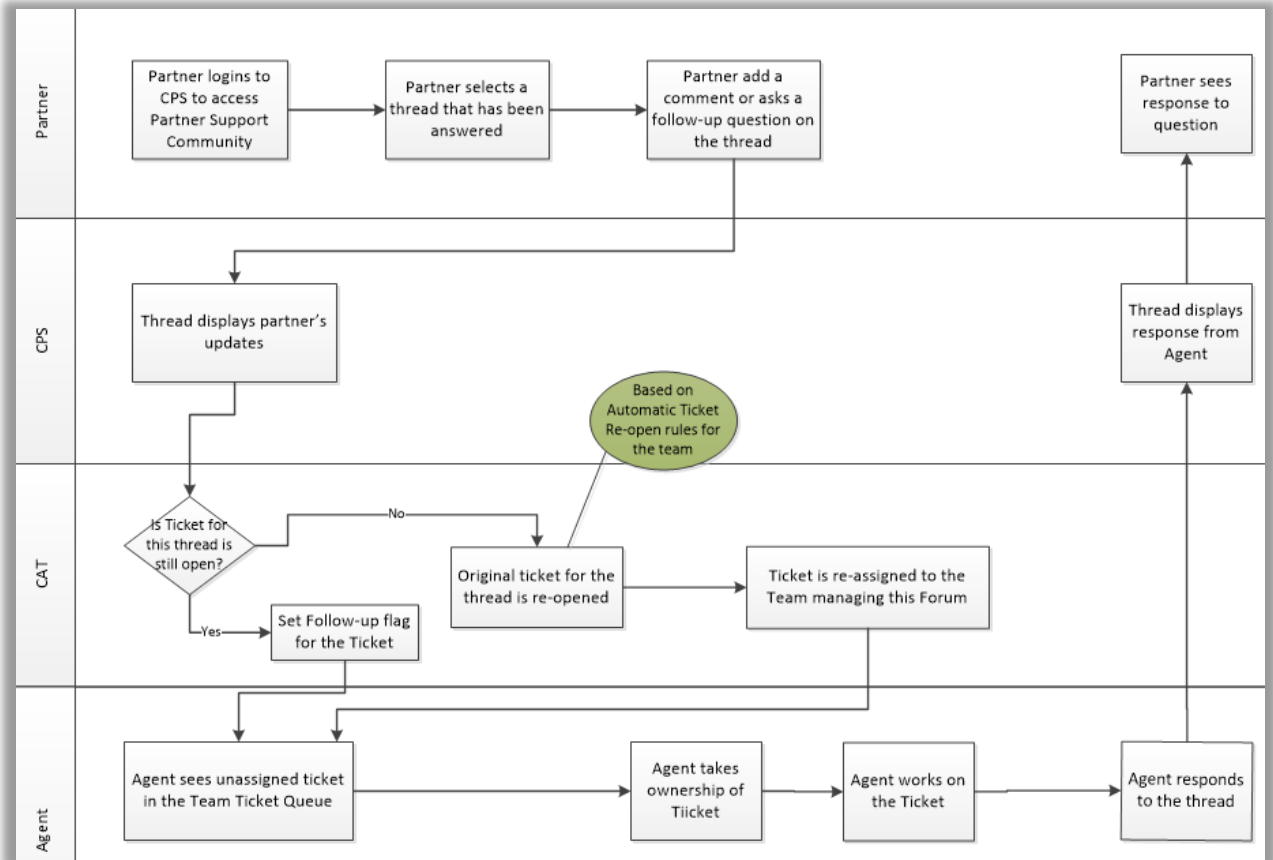
Information to be shared with CSRs

You will review these workflows again at the end of the course. For now, notice how the communications between Partners and RSC Agents run through both tools – the Partner-facing tool (CPS) and the Agent-facing tool (CAT). Information is automatically passed between them.


Partner Asks a New Question



Partner Updates Answered Thread



Community Platform Server (CPS)

 *Helpful instructor information*

This lesson should take approximately 30 minutes to complete.


This lesson provides a detailed description of the CPS tool's functionality.

Lesson Objectives

After completing this lesson you will be able to:

- Log into CPS with the Moderator role
- Navigate to the Forums, FAQ, and Code of Conduct
- Search for, create, and reply to threads
- Edit, delete, and designate threads as Answered or Helpful
- Request notification of thread updates
- Locate and edit a user profile
- Explain the options (tools and filters) available only to moderators (not Partners)

Access and Navigation

 *Helpful instructor information*

This section should take approximately 5 minutes to complete.

This section explains how to access CPS and navigate to the forum that RSC Agents will be monitoring – Partner Membership.

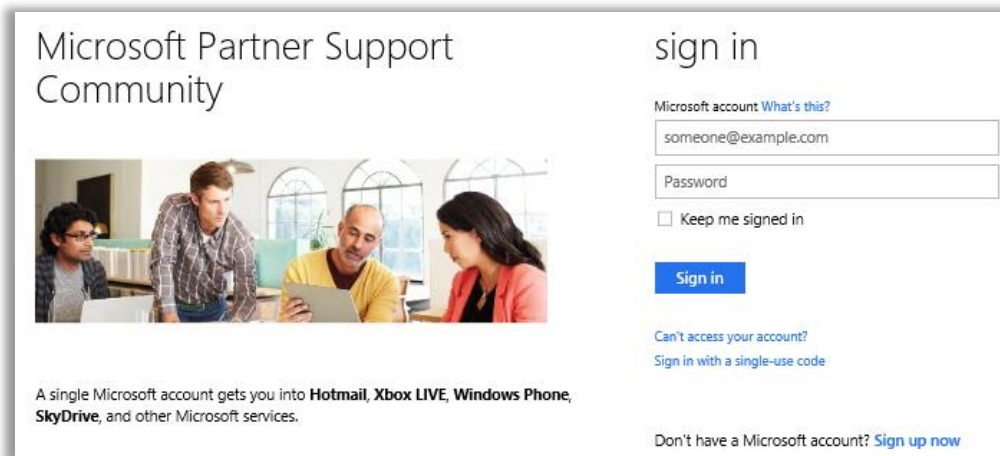
Logging into CPS

RSC Agents

RSC Agents log into CPS using their own Microsoft Account ID (this was formerly referred to as Windows Live ID, or WLID), which has been assigned a Moderator role in CPS. This Microsoft Account ID will also be used to log into CAT. If you do not have a Microsoft Account ID or if you are a new RSC Agent, talk to your manager to be provisioned on CPS and CAT.

Partners

Partners must log in with a Microsoft account that is associated with an active Microsoft Partner Network membership (new Partners will no longer experience a 2-day delay when trying to access the forums for the first time).



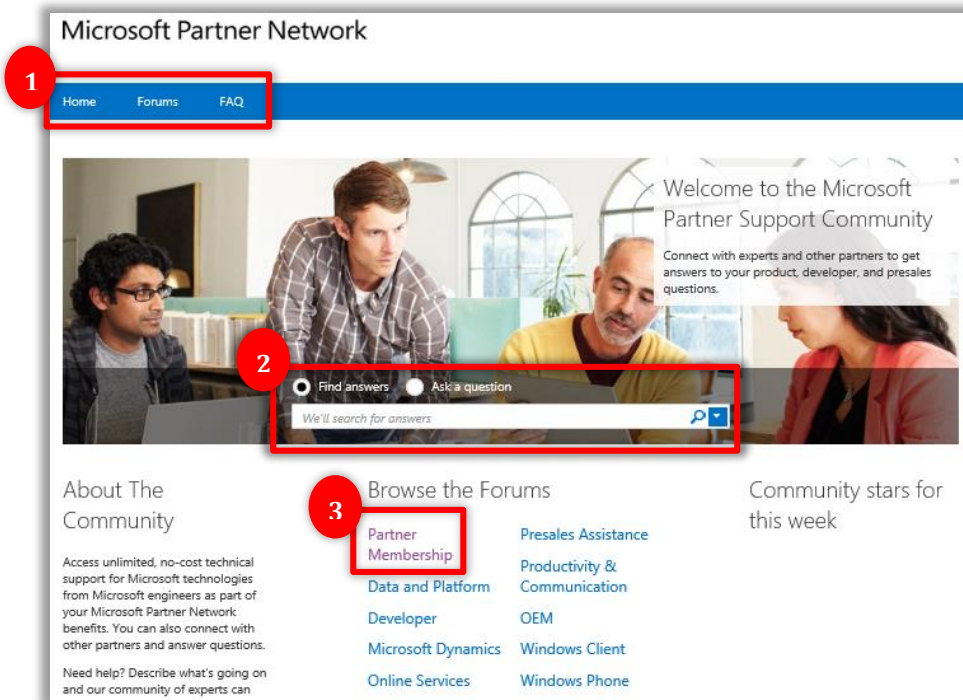
Partners' browser language settings determine the language that CPS appears in, but Partners may select another language after logging in. RSC Agents should be aware of this, as it means that a Partner in France might be asking questions in the English language forum. Available languages are listed at the bottom of the website by clicking on the globe icon:



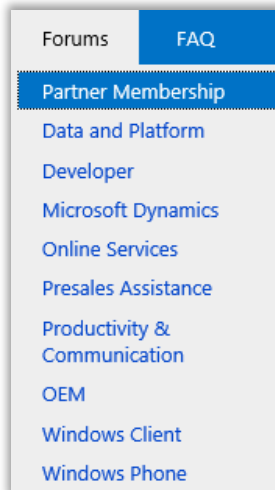
Notice that this area of the page is also where you can find the Code of Conduct and other information.

CPS Navigation

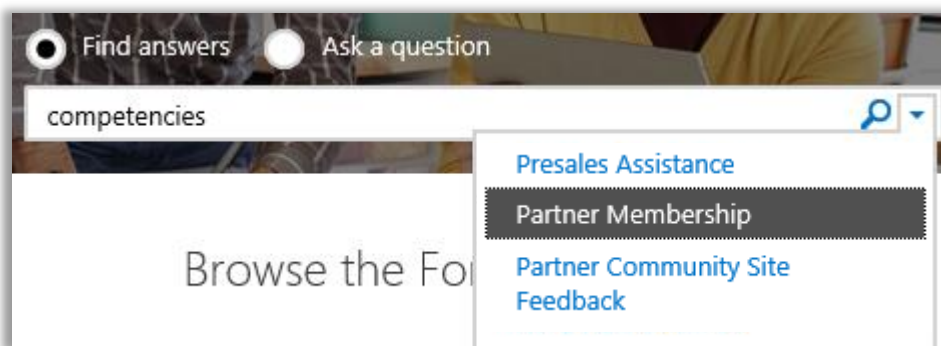
This is the Microsoft Partner Support Community homepage (in the CPS tool). There are three important areas:



1. The top menu contains links for the Home page (this page), Forums, and FAQ (Frequently Asked Questions). Clicking Forums will bring up the list of available forums. The only one that RSC Agents are responsible for is the top one – Partner Membership.



- Users may either find answers (within existing threads) or ask a question in the center text field. The blue arrow at the right allows users to restrict their answer search to a particular forum.




- Finally, the Browse the Forums section lists the all of the forums. Partner Membership is the top left option.



Other items you will find on the homepage:

- Community Stars for the Week: Partners with the most posts for the week are listed here.
- The Code of Conduct is linked at the bottom right of this and every page in the site.
- The Language Selection option is located at the bottom left of this and every page.

Partner Membership Forum


 *Helpful instructor information*

This section should take approximately 7 minutes to complete.

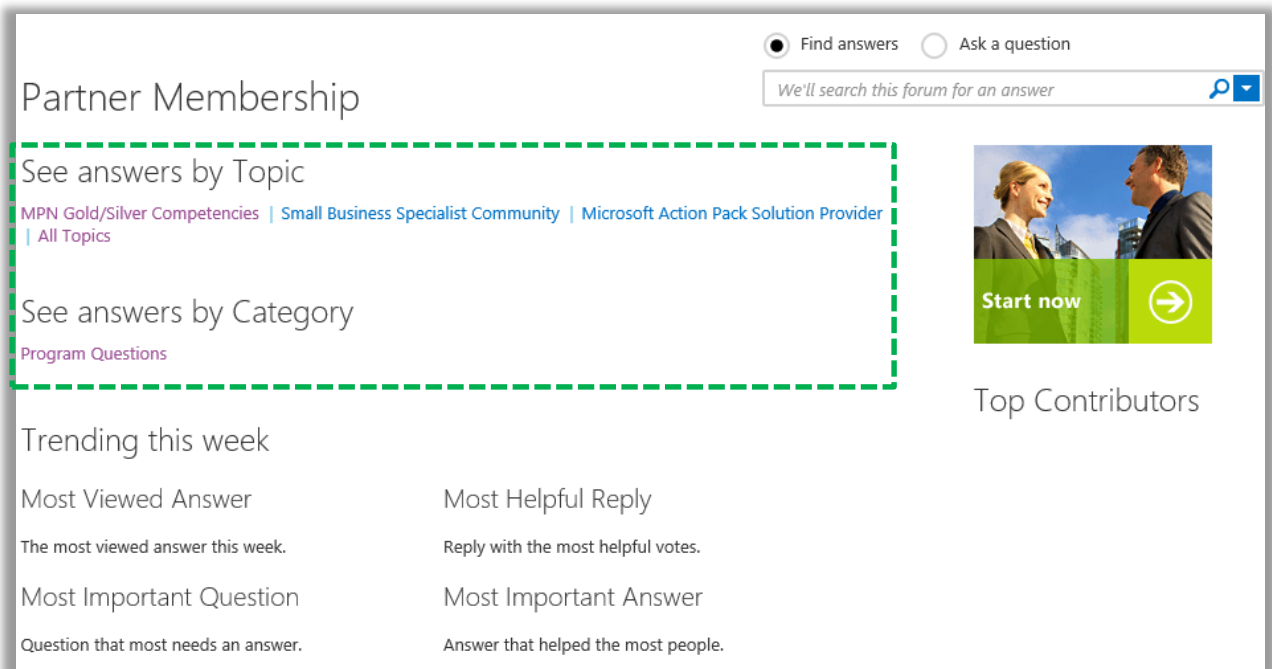
This section explains the items on the forum homepage and thread list page, as well as forum basics like how to filter forum search results and ask a question.

Partner Membership Forum Homepage

This is the homepage for the Partner Membership forum. The other forums are similarly organized. The top section (highlighted in green dashes) lets users choose how to view the thread list – by a particular topic or category, or by all topics or categories. Any option takes you to the same page – the only difference is the way the information is initially displayed.

 *Information to be shared with CSRs*

Notice that the top menu and Search box appear on this page (and other forum pages) as well. This time, the search will be limited to the current forum. The bottom section (Trending This Week) is self-explanatory, showing the top posts in each area.



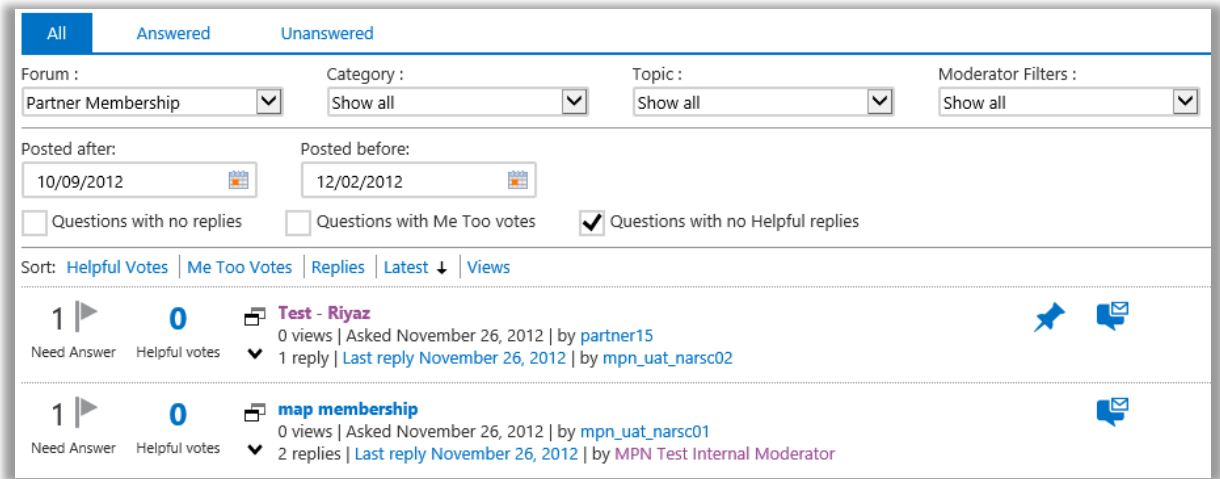
The screenshot shows the Partner Membership forum homepage. At the top right, there are radio buttons for "Find answers" (selected) and "Ask a question". Below them is a search bar with the placeholder text "We'll search this forum for an answer" and a search icon. The main content area is titled "Partner Membership". A green dashed box highlights the navigation options: "See answers by Topic" (with links for "MPN Gold/Silver Competencies", "Small Business Specialist Community", "Microsoft Action Pack Solution Provider", and "All Topics"), "See answers by Category" (with a link for "Program Questions"), and "Trending this week". To the right of the navigation options is a "Start now" button with a right arrow icon. Below the navigation options is a "Trending this week" section with four categories: "Most Viewed Answer" (The most viewed answer this week.), "Most Helpful Reply" (Reply with the most helpful votes.), "Most Important Question" (Question that most needs an answer.), and "Most Important Answer" (Answer that helped the most people.).


Thread List Page

If you click the third item under “See answers by Topic” listed above (MPN Gold/Silver Competencies), the Thread List Page appears with this Topic already selected in the drop-down menu options.

3. Change the date range of a thread
4. View Questions that have additional attributes – Me Too votes, no replies, no Helpful replies (these will also be discussed later)

Which filters do you see selected or altered below? Which filters from the image above have been removed? Find at least four things.



 Information to be shared with CSRs

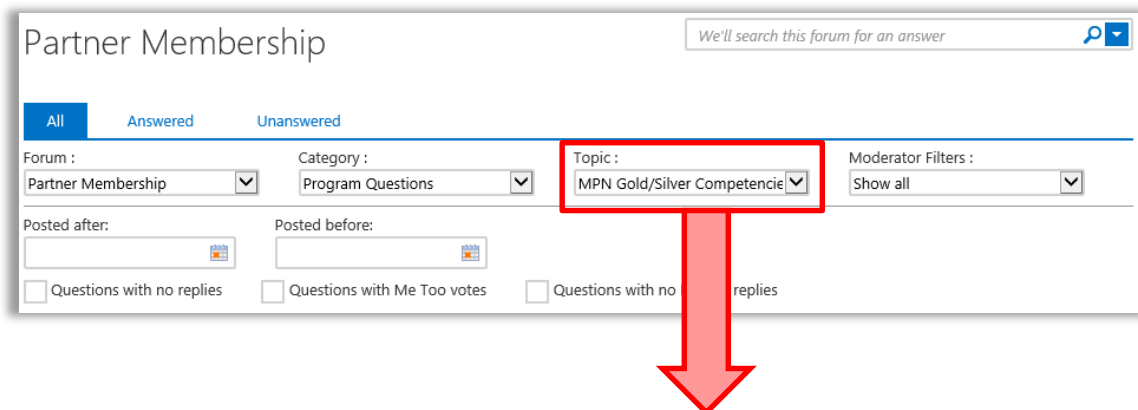
Have RSC Agents answer this out loud. Answers:

1. A date range has been added
2. Only questions with no Helpful replies are shown
3. At the top, ALL is now selected (rather than Answered questions only)
4. The Topics filter has been removed, so that all Topics are being shown (not just MPN Competencies)

We will look at the thread results and the information listed there in a few minutes.

Partner Membership Forum

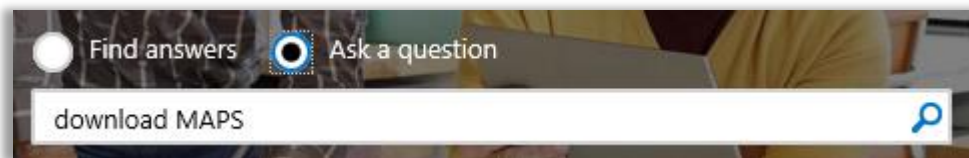
Recall that this is the only forum that RSC Agents will be responsible for managing. There is only one category within the this forum, “Program Questions.” Within this category, there are many topics.



- Show all
- MPN Gold/Silver Competencies**
- Small Business Specialist Community
- Microsoft Action Pack Solution Provider
- Microsoft Action Pack Development and Design
- Cloud Essentials/Accelerate Subscription
- Learning Solutions Partners
- Software Assurance Voucher Programs
- Channel Incentives
- Pinpoint
- Microsoft Dynamics
- Partner Learning Center

Ask a Question

You have seen how to browse to the Partner Membership forum. But what if you would like to ask a question right away? From the homepage (or the search box of a particular forum), a user may type in an entire question, or just a few keywords:



CPS retrieves a list of existing threads that might answer the user's question, and asks the user to make sure their question is not listed before continuing.

Partner Community Microsoft Support Microsoft Community

Before you post your question...
You may find that the community has already answered it. Check out these threads first, then if you still don't see the answer, you can post your question below.

<p>5 </p> <p>Need Answer</p>	<p>0</p> <p>Helpful votes</p>	<p>Download MAP Software</p> <p>I have been trying to download software as a part of MAPS. The download starts but consistently ends in a fatal error. There is a message saying the downloaded file is corrupt. I am asked if I want to</p>
<p>4 </p> <p>Need Answer</p>	<p>0</p> <p>Helpful votes</p>	<p>Unable to download SQL Server Standard 2008 (English) from MAPS</p> <p>Hi, I'm trying to download SQL Server Standard 2008 (English) from the MAPS area. I'm using the provided download manager. The download attempts to initialise, then fails. A message box appears which</p>

If the question is not listed, the user has the option to complete a form at the bottom of the page and submit the question as a new thread to a particular forum.

Question / Thread Title

Additional Details

Select a Forum, Category, & Topic

Post your question

Title
Feel free to change the title

Details
Include details to make it easier to answer your question

B / I U ↶ ↷ ☰ ☷ ⌵

Forum:
Partner Membership

Category **Topic**

--Select One--
MPN Gold/Silver Competencies

Notify me when someone responds to this question

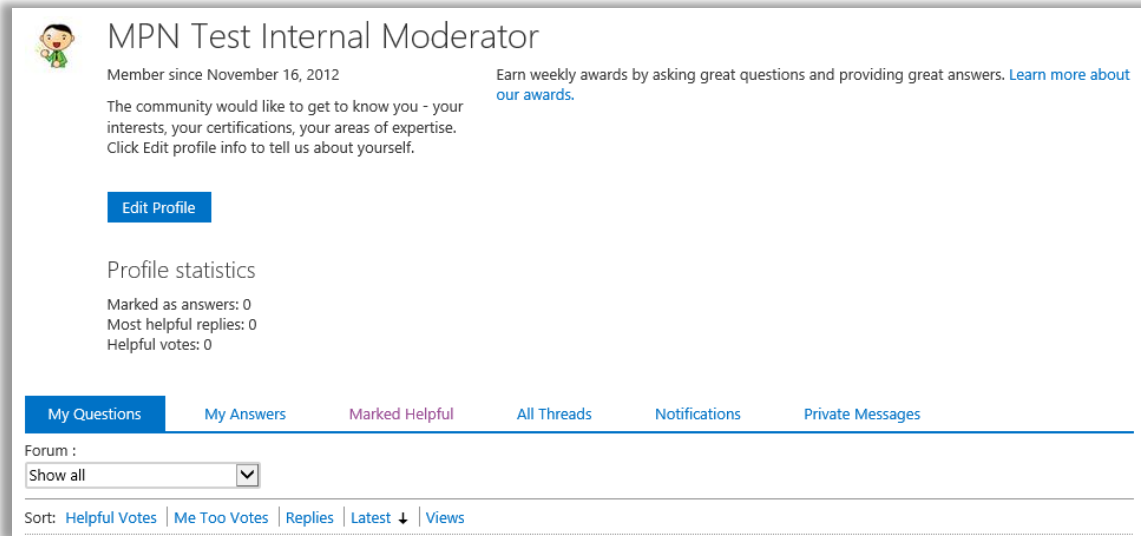
Submit
Cancel

The Forum will always be Partner Membership (for threads relevant to RSC Agents), and the only Category option is “Program Questions.” Users are automatically notified when someone responds to their question. If they prefer not to be notified, they may uncheck the box at the bottom of the form.

Once users click **Submit**, they will be taken to their Profile Page, where they will see their question listed with the others they have asked.

User Profile Page

This is the User Profile page. The top area shows statistics for the user, such as how many of their replies have been chosen as Answers, Most Helpful, or Helpful. The bottom area has tabs that provide several different types of information that will be described below.



MPN Test Internal Moderator
 Member since November 16, 2012
 Earn weekly awards by asking great questions and providing great answers. [Learn more about our awards.](#)

The community would like to get to know you - your interests, your certifications, your areas of expertise. Click Edit profile info to tell us about yourself.

[Edit Profile](#)

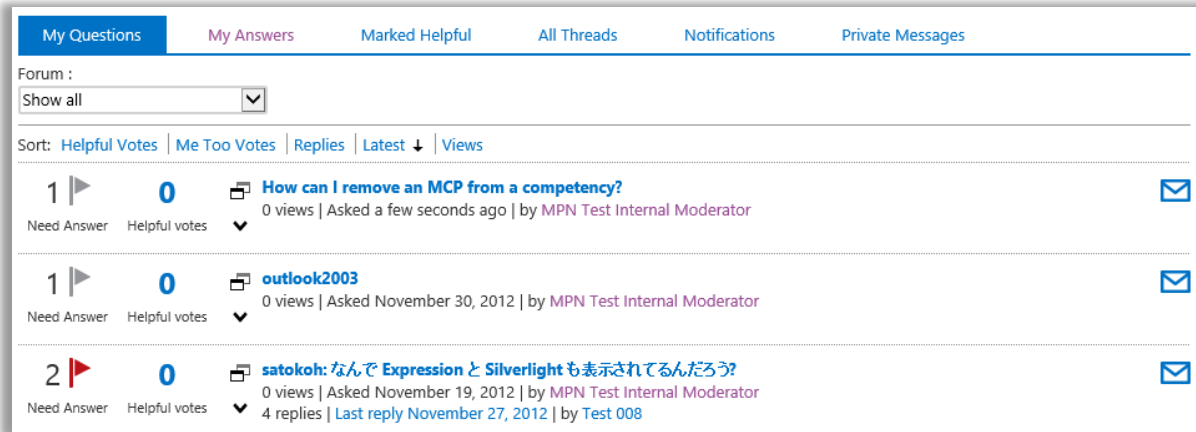
Profile statistics
 Marked as answers: 0
 Most helpful replies: 0
 Helpful votes: 0

My Questions | My Answers | Marked Helpful | All Threads | Notifications | Private Messages

Forum :
 Show all

Sort: [Helpful Votes](#) | [Me Too Votes](#) | [Replies](#) | [Latest](#) ↓ | [Views](#)

All of a user's questions appear under the **My Questions** tab.



My Questions | My Answers | Marked Helpful | All Threads | Notifications | Private Messages

Forum :
 Show all

Sort: [Helpful Votes](#) | [Me Too Votes](#) | [Replies](#) | [Latest](#) ↓ | [Views](#)

1	0		How can I remove an MCP from a competency? 0 views Asked a few seconds ago by MPN Test Internal Moderator	
1	0		outlook2003 0 views Asked November 30, 2012 by MPN Test Internal Moderator	
2	0		satokoh: なんで Expression と Silverlight も表示されてるんだろ? 0 views Asked November 19, 2012 by MPN Test Internal Moderator 4 replies Last reply November 27, 2012 by Test 008	


The other tabs above show similar personalized information. Hovering over any of these tabs will reveal what they contain:

- **My Answers:** answers Partners have provided
- **Marked Helpful:** threads they have found helpful
- **All Threads:** all threads they have contributed to
- **Notifications:** all threads they have subscribed to
- **Private Messages:** all private messages they have received for threads

Partners may also edit profile information – such as a display name, image, description, signature, URL (website), and preferences – from this page by clicking on the Edit Profile icon toward the top of the profile page.

[Edit Profile](#)

Threads





 *Helpful instructor information*

This section should take approximately 15 to complete.


Now that you have seen how to find answers and post questions, let us look at the threads themselves in this section.

Search Results

Sort: [Helpful Votes](#) | [Me Too Votes](#) | [Replies](#) ↓ | [Latest](#) | [Views](#)

 Answered	7 Helpful votes	 Any official word on the ability to switch from traditional MAPS to Developer? 614 views Asked May 24, 2010 by kal326 39 replies Last reply July 11, 2010 by PhatZim
14  Need Answer	0 Helpful votes	 Cannot access MSDN subscription 381 views Asked May 31, 2010 by Miroslav Havram 38 replies Last reply June 30, 2010 by diakonius

Each search result contains several pieces of information about that particular thread. Most of the items above should be simple to interpret, but write any notes below to reference later if any items are not clear.

 *Information to be shared with CSRs*

Point out the following items above, particularly what the items at the left refer to (items 2-4 below)

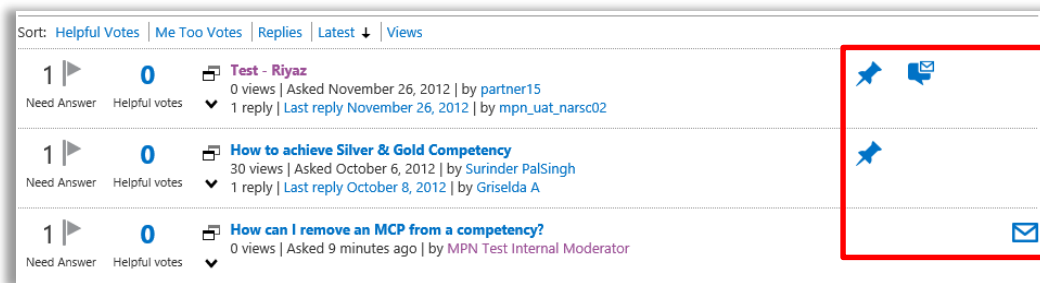
1. Items may be **sorted** by all of the options shown – the most Helpful Votes, Me Too Votes, Replies, the most Recent and the most Views.
2. A **check mark** at the left of the thread means that the person who posted the question has picked an Answer to the thread.
3. The number of **Helpful Votes** refers to the TOTAL number of helpful votes that ALL responses to a thread have received (not only the response that is chosen as the Answer).
4. A **flag** next to a thread means that it still requires an answer. If more than one user is interested in an answer, the flag becomes red (as shown above). Any user may indicate that they also have this question on the question page itself, which will be shown below.

- The text items include the title of the initial question, number of views, the date posted and the Partner who posted it, the number of replies, and the date and source of the latest reply


As you would imagine, clicking on a Partner name will take you to their Profile page. Clicking on the date takes you to the latest reply, and clicking on the title brings you to the first page of the thread. The other items cannot be clicked on.

Thread Search Result Icons

You might see blue icons to the right of a thread result.



Write the meaning of each of the icons below next to the image.

 *Helpful instructor information*

Explain the meaning of each icon below as the RSC Agents write in the answers.

 _____

You are subscribed to this thread

 _____

This thread contains private messages

 _____

This thread is important

 _____

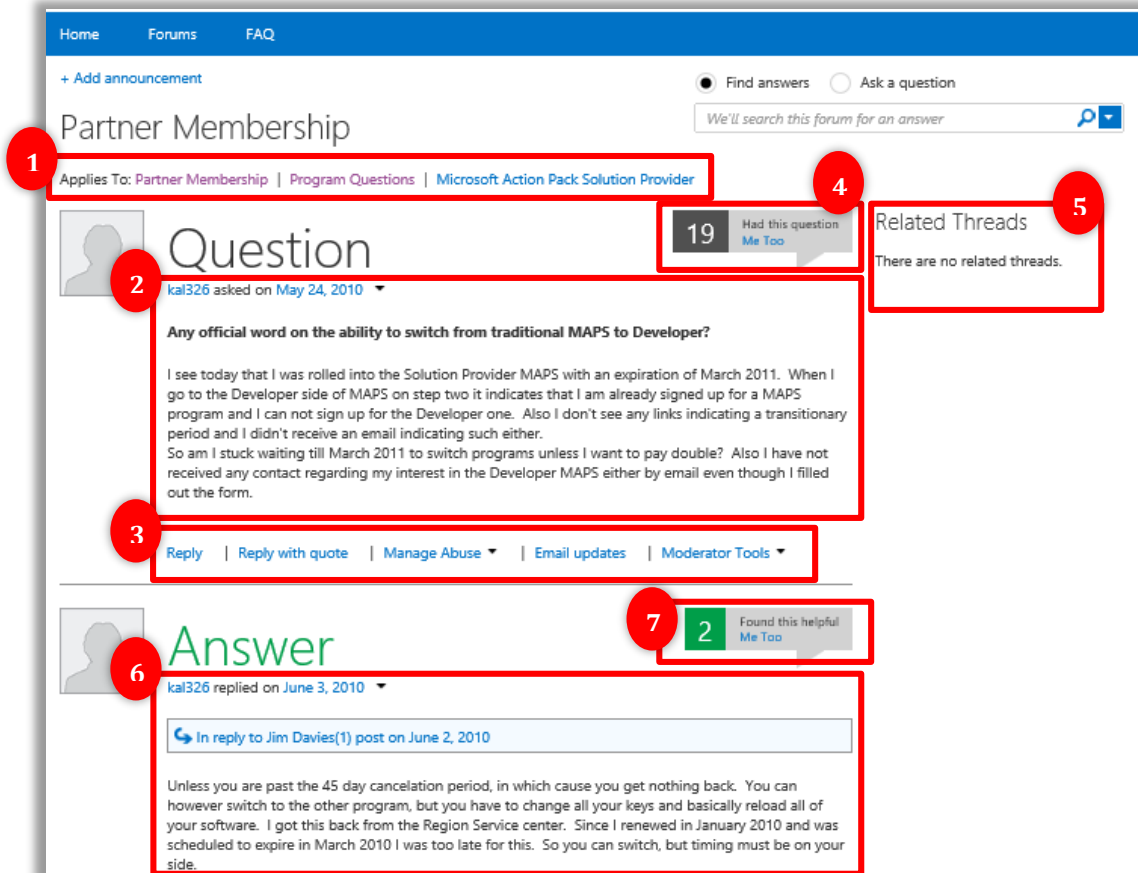
This thread has been deleted

 _____

This thread is locked from future replies

Thread Layout and Content

Clicking on the title of a thread in a thread result opens the first page of the thread, containing the Question (including the number of additional Partners who had that question) and the chosen Answer (including the number of Helpful Votes the answer received). A complete description of the numbered items is below.

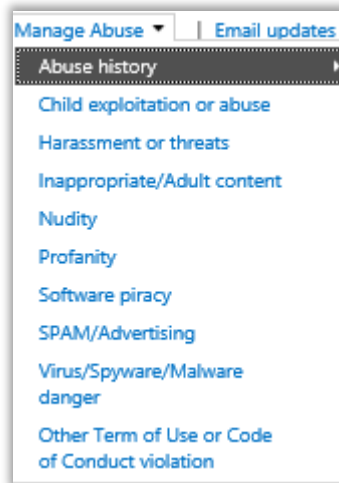


1. The **Forum, Category, and Topic** in which the question is listed.
2. The **question** (title and details), the Partner that posted it, and the date it was posted.
3. Clickable **options** to Reply to the thread (with the option of quoting the original question), the option to receive email notifications (or stop receiving them) when this thread is updated, and Moderator Tools, which will be discussed in a later section.

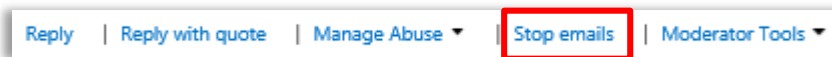
The Manage Abuse menu warrants more specific discussion. In this area, users may indicate that a specific post is inappropriate in any of the ways listed below. It also shows the Abuse History of that particular user.

Helpful instructor information


Agents will learn how to respond to Abuse notifications later on – either in a separate training or communication or, most likely, in VKB. These processes have not been finalized at the time this course was submitted.



- The number of **other users who also had this question**. Any user may click on “Me Too” in this area to be added to this list. They will then be notified of any updates, unless they click **Stop Emails** in the clickable options area.



5. Related threads


 *Helpful instructor information*

We don't yet know how these are determined. This can be in VKB when we find out.

- The **Answer**, answer details, user who posted the answer, the date it was posted, and information about which specific post the answer was replying to (notice that in this case, the Answer chosen was NOT in response to the original question, but was in reply to a later comment by another user).

All of the other responses in the thread are listed below the chosen Answer. Users who find any other response may mark it as Helpful at the top right of each response.

All Replies (39)




IanTrem replied on [May 24, 2010](#)

1

Found this helpful
[Me Too](#)

An e-mail came out from MS quite a while back stating we'd get an e-mail with full instructions nearer the launch date.
I'm waiting for mine too.

[Reply](#) | [Reply with quote](#) | [Manage Abuse](#) | [Moderator Tools](#)



milesb2012 replied on [May 24, 2010](#)

0

Found this helpful
[Me Too](#)

you are not alone - they don't make it easy...

[Reply](#) | [Reply with quote](#) | [Manage Abuse](#) | [Moderator Tools](#)

A reply that has been deleted will appear grey and crossed out. A post may be deleted by the person who submitted it, as well as by forum moderators.

↶ In reply to [milesb2012 post on May 24, 2010](#)

Thanks for your question.
I am sorry to tell you that there is no offer for partners simply switching between subscriptions. Only eligible partners currently not in an Action Pack subscription or in an Action Pack subscription that is coming to its end can enroll in Microsoft Action Pack Development and Design.

Best regards,

Kimi-Zhu
Partner Online Technical Community

We hope you get value from our new forums platform! Tell us what you think:
<http://social.microsoft.com/Forums/en-US/partnerfdbk/threads>

This posting is provided "AS IS" with no warranties, and confers no rights.

How Partners Can Find the Best Answer

Posts that actually contain the correct answer to the question will be marked "Answer" by the Partner who submitted the question (they may also change their mind and "Unmark as Answer"). However, Partners can also look for posts with a high number of "Helpful" votes, even if they haven't been marked as answers yet. These may appear with the designation "Most Helpful Reply."

[Reply](#) | [Reply with quote](#) | [Report abuse](#) | Mark as Answer

And



Editing and Deleting a Thread

Users may edit or delete their own threads by clicking the **Edit** option under their post.



The post appears for editing, and includes a **Delete** option at the bottom.

Move, edit, or delete this post

Title
Feel free to change the title

Details
Include details to make it easier to answer your question

B *I* U ↺ ↻ ☰ ☷ ☰ ☷

Someone is leaving the company and we must replace them with another MCP who has not yet been qualified. What steps should we take?

Forum:

Category: **Topic:**







Notify me when someone responds to this question

Submit
Cancel
Delete Post

Replying to a Thread

There are two options when replying to a thread – Reply and Reply with Quote. A message that quotes the post (in blue) it is replying to is shown below. By default, the poster will be notified of any further responses to this thread. Clicking **Submit** will return the user to the initial Question page.

Reply with quote


B *I* U      

This is in contradiction to an email I received earlier asking me to indicate interest in switching from my old pre-may 24th subscription to the new solution developer subscription. I should be allowed to choose which of the two new subscriptions solution provider or solution developer instead of having an arbitrary and inappropriate decision made on my behalf. I have made plans base on the the availability of the the developer subscription being available this week. Can I terminate my current subscription and enroll in the subscription of my choice?

The response would go in this space.

Notify me when someone responds to this question

Moderator Tools and Filters

 *Helpful instructor information*

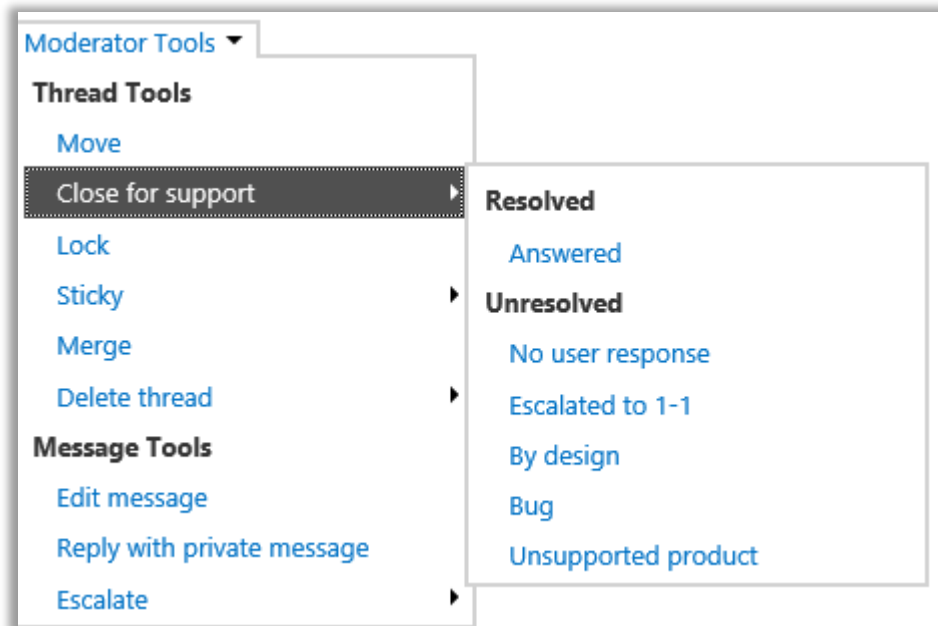
This section should take approximately 2 minutes to complete.

This section introduces the Moderator Tools and Moderator Filters options, which appear when you log in as a moderator. Recall the menu below appears beneath every post.

Moderator Tools



When the Moderator Tools link is expanded, a list of actions appears. Many have options that appear when you click the arrow at the right – such as the reason for Deleting a post or the recipient of an Escalation. Some of these options are customized according to the post. One option not shown here, for example, is “Split Message,” which allows you to post the same message in another area (forum, category, or topic) with another name.



Private Replies

Notice above the option to “Reply with a private message” to a Partner. A Partner's replies can also be sent privately to that moderator if this option is clicked.

If a Moderator has designated a reply as Private, as mentioned above, the message will only be shown to that particular user. That user must click the notification below to view the reply:

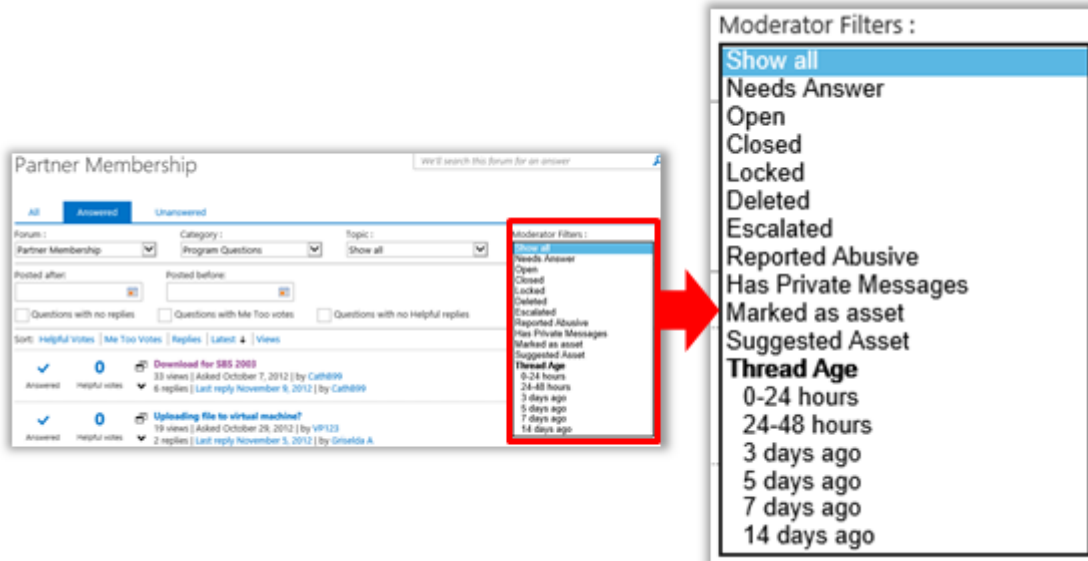
The screenshot shows a forum post titled "Partner Membership". At the top right, there is a search bar with the text "We'll search this forum for". Below the title, it says "Applies To: Partner Membership | Program Questions | Small Business Specialist Community". A red arrow points to a notification icon (a speech bubble with an envelope) and the text "You have a private reply to this message. Click here to read it on our secure private messages section." Below this is a user profile for "CathB99" with a question icon and the text "Question". To the right of the question is a badge with the number "3" and the text "Had this question Me Too". The question text is "Download for SBS 2003" followed by "Anyone know where I can download SBS 2003? I'm about to start a migration from SBS 2003 to SBS 2011 but don't have the original SBS 2003 media. Does anyone have a download link that I can use for the software?". At the bottom, there are links for "Reply", "Reply with quote", "Manage Abuse", "Email updates", and "Moderator Tools".

The private messages are then shown in a separate box beneath the regular replies.

The screenshot shows the "All Replies (6)" section of a forum. A blue tab labeled "Private Messages" is selected. Below the tab, there is a message box with the text "Conversations on this tab are private messages between you and the moderators of this forum, intended for your sole use." Below this, there is a notification icon and the text "Private reply to CathB99". The message text is "Anyone know where I can download SBS 2003? I'm about to start a migration from SBS 2003 to SBS 2011 but don't have the original SBS 2003 media. Does anyone have a download link that I can use for the software?". Below the message, there is a red text "This is a private message." and a reply from "MPN Test Internal Moderator" dated "November 28, 2012" with the text "test private". At the bottom, there are links for "Reply", "Manage Abuse", and "Moderator Tools", and two checked checkboxes: "Allow private replies" and "Allow file upload (100MB total)".

Moderator Filters

This filter appears at the right of the usual filter options (forum, category, and topic) on the Thread list Page shown earlier. It allows moderators to filter threads based on status, age, or other attributes.




Moderator Signatures and Form Text

You will notice that moderator replies have a standard set of information at the end. There will be a standard signature for RSC Agents. This will be outlined in the VKB.

SLAs

Support is provided during business hours, 9 AM until 5 PM in the Partner's location. Knowing the country is important for you to know when you view Partner threads in a specific country, and then work to meet the SLA for that Partner.

Initial responses are provided during local business hours (excluding holidays). Check the VKB for current SLA information.

 *Helpful instructor information*

The VKB will likely not be available yet, but in the future that is where Agents will look for SLA information.

Community Agent Tool (CAT)



Helpful instructor information

This lesson should take approximately 90 minutes to complete.


This lesson explains CAT in more detail and describes how RSC Agents use the tool to manage Partner threads.

Lesson Objectives

After completing this lesson you will be able to:

- Navigate the CAT tool and explain each element on the CAT homepage
- Explain the layout, functions, filters, icons, and options on the Forums page
- Navigate, explain, and customize the Threads page display, and interpret its icons
- Set relevant Profile and Preferences information
- Explain the purpose and management of tickets and tasks
- Describe the purpose and use of the labor timer

The CAT Homepage

 *Helpful instructor information*

This section should take approximately 15 minutes to complete.

This lesson introduces you to the CAT homepage and its five sections. It also discusses items found on the homepage, such as Alerts, Announcements, and personalization options.

CAT Cards

The five “cards” shown on the CAT homepage provide access to key areas of the CAT experience.

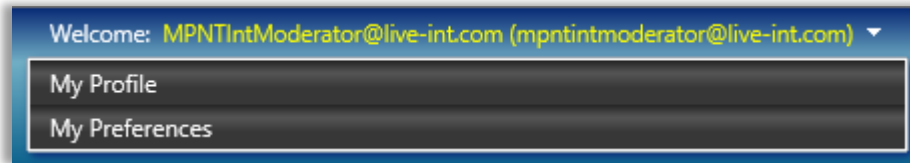
- The **Forums** card takes you to the Forums page where you can select, view, and work the threads that appear in the Partner Membership forum.
- The **Monitored Threads** card lets you view a list of threads that you have identified as ones that require your ongoing oversight. RSC Agents will not need to use this area.
- There are also three incident management cards: **My Team Tickets**, **My Tickets**, and **Tasks**. The incident management cards refer to various aspects of the CAT ticketing system. Tickets help you manage and track the work that you perform in your forums. This subject is covered in detail later in this course.



Preferences and Profile Menus

A drop-down menu next to your username at the top right of the screen gives you access to your CAT preferences and CAT profile information. My Profile provides access to your Public and Private Profile pages. My Preferences allows you to configure alerts that notify you when

certain conditions are met in the threads you support. Both of these topics are covered later in the lesson.



Announcements

You can mouse over the Announcements icon (the icon on the right) to view a clickable list of announcements relevant to you and your job role. It is important that you check these announcements daily.



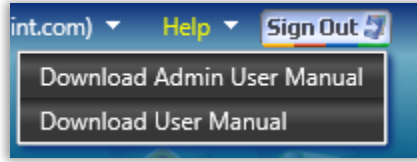
Alerts

You can hover over the Alerts icon (on the left) to view a clickable drop-down list of alerts (in the case below, there is only one). The alerts that appear here are configured by you in your CAT preference settings. You will learn more about alerts later in this course. The Alerts icon will not appear until you have configured some alerts from your My Preferences page.




Help

The Help menu on the top right side of the page lets you download the CAT Agent User Manual and the CAT Admin User Manual. Many optional processes that are not included in this training can be accessed here.



The Forums Page

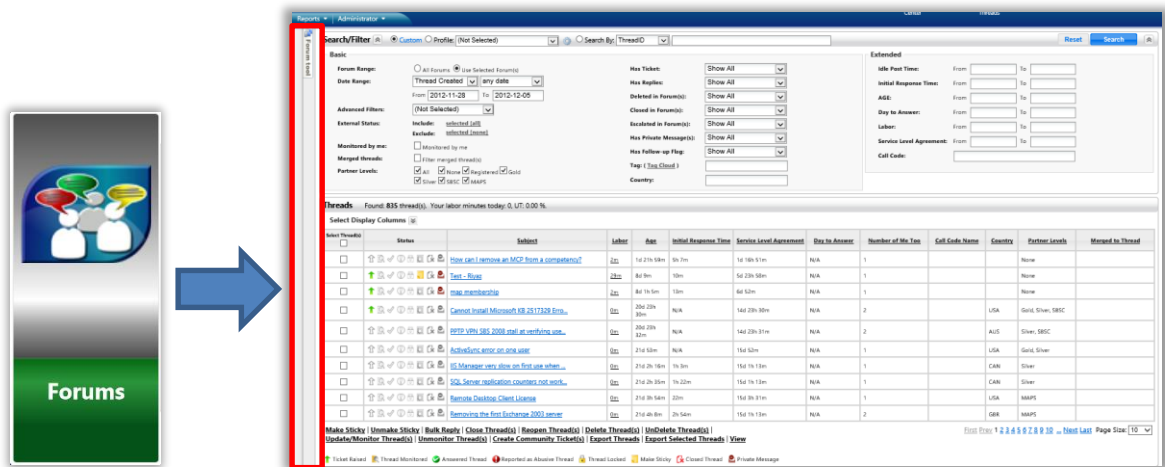
 *Helpful instructor information*

This section should take approximately 10 minutes to complete.

The Forums page gives you direct access to the Microsoft Partner Support Community threads that you support. This section familiarizes you with the Forums page and the tools that are available to help you manage threads.

View the Forums Page

Clicking the Forums Card from the CAT homepage brings you to the CAT Forums page. This is where you begin your work in CAT.



The narrow Forum Tool tab at the left above can be expanded so that agents may select the relevant forum. Below it is shown with the RSC Agent area selected for RSC Agents handling English language threads (Program Questions category within the Partner Membership forum):



CAT Toolbar

At the top right side of the Forums page is the CAT Toolbar. The buttons in the CAT Toolbar provide quick access to Announcements, Tasks, Monitored Threads, the Forums Page, the

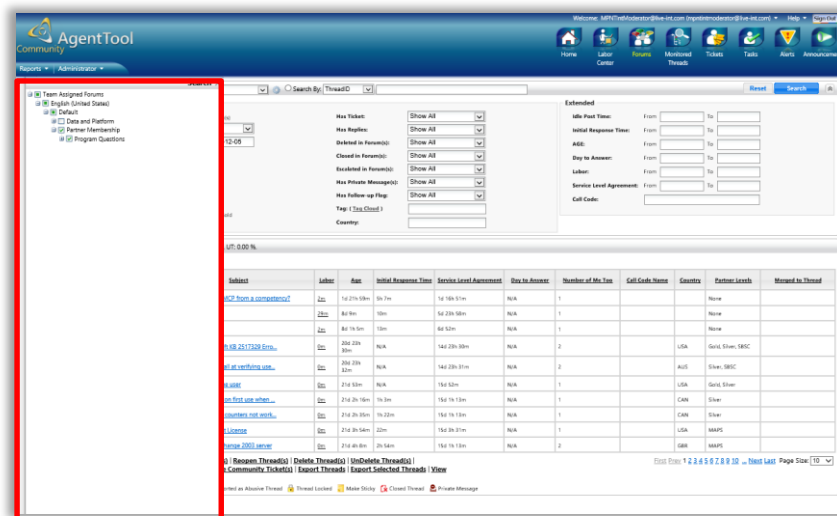
Labor Center, and the CAT home page. You have already seen the Alerts and Announcements icons. You will hear about these other sections alter in the course.



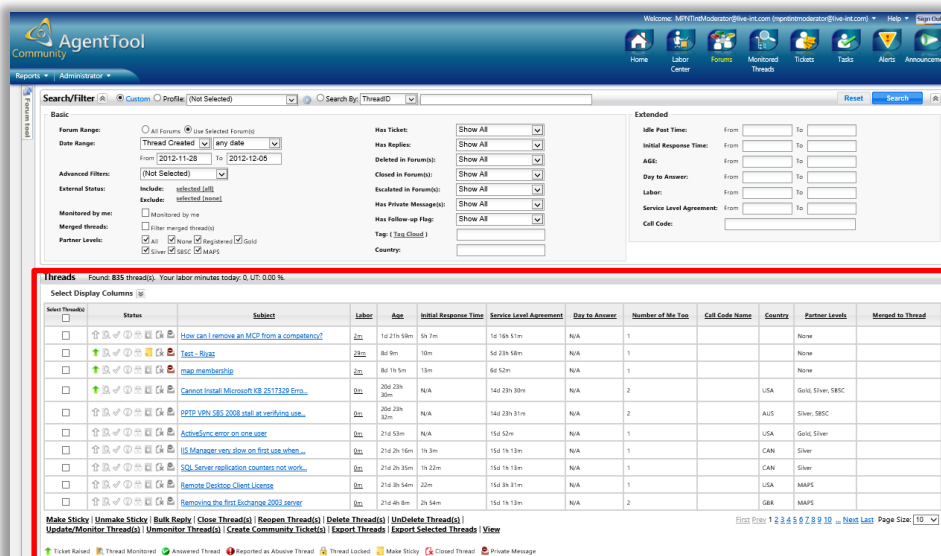
Forum Page Sections

The Forum page is composed of three major sections:

Forums List – This list (at the left) expands to let you select the forum that you support. This was shown above.



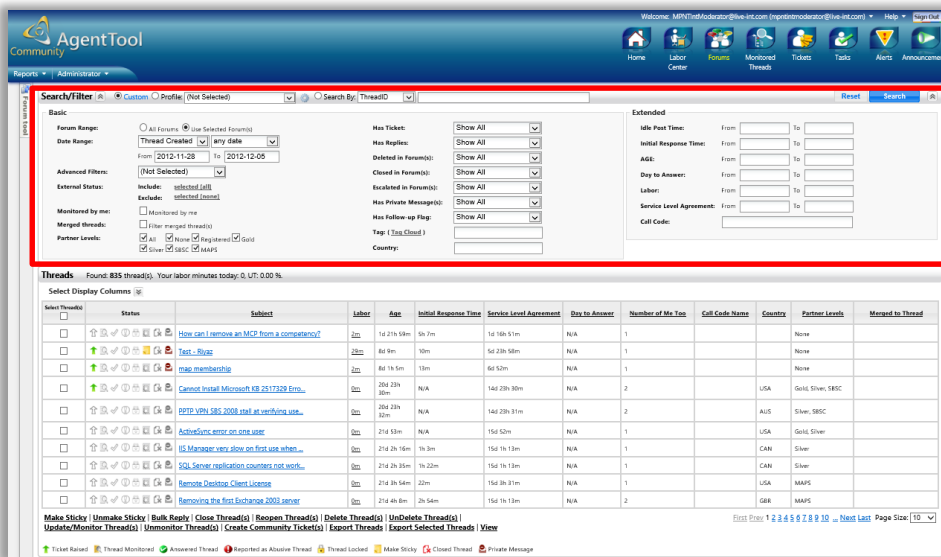
Threads List – This list shows you the threads in the CPS tool (Microsoft Partner Support Community).



Search / Filter Pane – This lets you use an extensive set of filters and sort options to define a list of threads that appear in the Threads list.

Information to be shared with CSRs

This pane can be expanded and retracted by clicking the chevron next to the Search / Filter title text at the top left of the pane. When you are using a default search profile (explained later in more detail), this pane retracts, because the profile has pre-selected the filters used for that search.



There are a few Partner-specific options at the top. One is in the Search By field at the top of the Search/Filter pane, Partner Email and Partner Name. Thread ID and Title are standard fields.

You can also filter by Partner Level and by Country. For Country, use the country code of the partner to view threads related to that specific partner.

Search Profiles

Search Profiles define what appears in the Threads List.

Information to be shared with CSRs

The threads that appear in the Threads List are determined by the Forum and the values selected in the Sort/Filter tool. The default search profile that is used when an agent logs in is created by the team manager, and RSC Agents may not alter it. However, they may create an additional personalized profile if they choose to.

Who creates the default search profile that RSC Agents see when they log in?

_____ *their team manager*

What search values are included in the personalized search above?


Information to be shared with CSRs

The profile above will return threads with the following parameters:

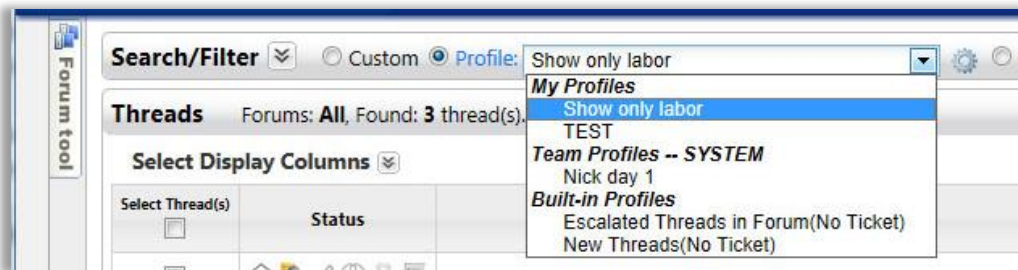
- *created in the past month*
- *monitored by that RSC Agent*
- *Partner level is Gold*

Default Search Profiles

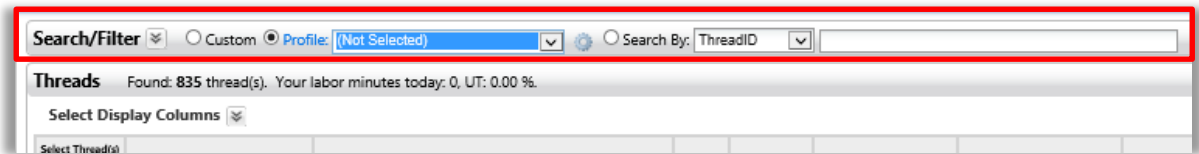
When you sign into CAT for the first time, the list of threads that you see will be pre-filtered for you using a search profile defined for your team.

 Information to be shared with CSRs


The text in the Profile drop-down menu contains the name of the search profile used to define the current list of threads appearing in your Threads List. Below, you see one personal profile, one team profile, and two built-in profiles. There will also be two profiles when you log in, but they will not necessarily have the same name as the two below.



When you click the radio button next to the word Profile, the Search/Filter pane retracts. This is because when you select a Profile, you are telling CAT that you want to work only with the default search profiles.



The Threads List

 *Helpful instructor information*

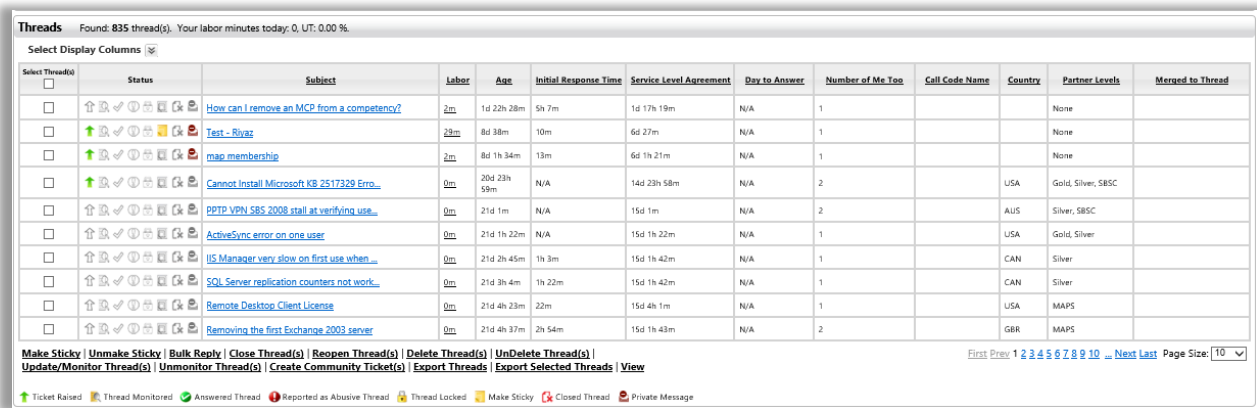
This section should take approximately 12 minutes to complete.

This lesson familiarizes you with each of the components that make up the **Threads** list.


Threads List Icons and Columns

















































































The Threads list lets you directly interact with threads, manage your threads, and track your threads using ticket options (tickets will be discussed in the next lesson).

The Threads list has multiple columns. Each gives you information about the thread, or enables you to take some action on the thread.











Threads Found: 835 thread(s). Your labor minutes today: 0, UT: 0.00 %

Select Display Columns 

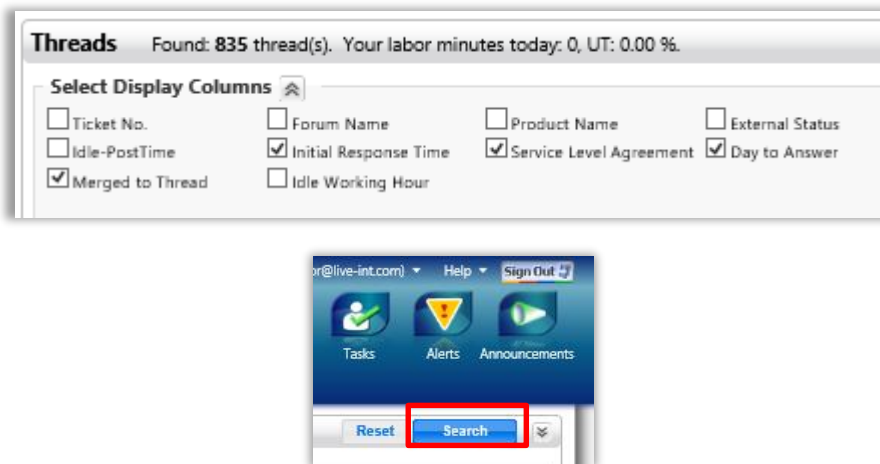
Select Thread(s)	Status	Subject	Labor	Age	Initial Response Time	Service Level Agreement	Day to Answer	Number of Me Too	Call Code Name	Country	Partner Levels	Merged to Thread
<input type="checkbox"/>	       	How can I remove an MCP from a competency?	2m	1d 22h 28m	5h 7m	1d 17h 19m	N/A	1			None	
<input type="checkbox"/>	       	Test - Riyaz	2m	8d 38m	10m	6d 27m	N/A	1			None	
<input type="checkbox"/>	       	map membership	2m	8d 1h 34m	13m	6d 1h 21m	N/A	1			None	
<input type="checkbox"/>	       	Cannot Install Microsoft KB 2517329 Error...	0m	20d 23h 59m	N/A	14d 23h 58m	N/A	2		USA	Gold, Silver, SBSC	
<input type="checkbox"/>	       	PPTP VPN SBS 2008 stall at verifying use...	0m	21d 1m	N/A	15d 1m	N/A	2		AUS	Silver, SBSC	
<input type="checkbox"/>	       	ActiveSync error on one user	0m	21d 1h 22m	N/A	15d 1h 22m	N/A	1		USA	Gold, Silver	
<input type="checkbox"/>	       	IIS Manager very slow on first use when ...	0m	21d 2h 45m	1h 3m	15d 1h 42m	N/A	1		CAN	Silver	
<input type="checkbox"/>	       	SQL Server replication counters not work...	0m	21d 3h 4m	1h 22m	15d 1h 42m	N/A	1		CAN	Silver	
<input type="checkbox"/>	       	Remote Desktop Client License	0m	21d 4h 23m	22m	15d 4h 1m	N/A	1		USA	MAPS	
<input type="checkbox"/>	       	Removing the first Exchange 2003 server	0m	21d 4h 37m	2h 54m	15d 1h 43m	N/A	2		GBR	MAPS	

[Make Sticky](#) | [Unmake Sticky](#) | [Bulk Reply](#) | [Close Thread\(s\)](#) | [Reopen Thread\(s\)](#) | [Delete Thread\(s\)](#) | [UnDelete Thread\(s\)](#)
[Update/Monitor Thread\(s\)](#) | [Unmonitor Thread\(s\)](#) | [Create Community Ticket\(s\)](#) | [Export Threads](#) | [Export Selected Threads](#) | [View](#)

[First](#) [Prev](#) [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) ... [Next](#) [Last](#) Page Size: 10

 Ticket Raised |  Thread Monitored |  Answered Thread |  Reported as Abusive Thread |  Thread Locked |  Make Sticky |  Closed Thread |  Private Message

The columns may be customized by clicking the **Select Display Columns** chevron at the top left. Once you make changes to the columns you would like displayed, you must click Search again at the top right of the tool, as though you are initiating a completely new Search.



Checkboxes and Bulk Actions

The checkboxes on the left side of the list are used for selecting threads upon which you want to perform an action. You can select *multiple* checkboxes to perform *bulk* actions on several threads at once.

For example, if you select one or more checkboxes and then select an action such as Make Sticky from the Actions Options (directly beneath the Threads List), you will have made all of the selected threads sticky threads (threads that remain at the top of a thread list) in the forums.

Select Thread(s)	Status	Subject	Labor	Age	Initial Response Time	Servi
<input type="checkbox"/>		How can I remove an MCP from a competency?	2m	1d 22h 28m	5h 7m	1d 17
<input type="checkbox"/>		Test - Riyaz	29m	8d 38m	10m	6d 27
<input type="checkbox"/>		map membership	2m	8d 1h 34m	13m	6d 1h
<input type="checkbox"/>		Cannot Install Microsoft KB 2517329 Erro...	0m	20d 23h 59m	N/A	14d 2
<input type="checkbox"/>		PPTP VPN SBS 2008 stall at verifying use...	0m	21d 1m	N/A	15d 1
<input type="checkbox"/>		ActiveSync error on one user	0m	21d 1h 22m	N/A	15d 1
<input type="checkbox"/>		IIS Manager very slow on first use when ...	0m	21d 2h 45m	1h 3m	15d 1
<input type="checkbox"/>		SQL Server replication counters not work...	0m	21d 3h 4m	1h 22m	15d 1
<input type="checkbox"/>		Remote Desktop Client License	0m	21d 4h 23m	22m	15d 4
<input type="checkbox"/>		Removing the first Exchange 2003 server	0m	21d 4h 37m	2h 54m	15d 1

[Make Sticky](#) | [Unmake Sticky](#) | [Bulk Reply](#) | [Close Thread\(s\)](#) | [Reopen Thread\(s\)](#) | [Delete Thread\(s\)](#) | [UnDelete Thread\(s\)](#) | [Update/Monitor Thread\(s\)](#) | [Unmonitor Thread\(s\)](#) | [Create Community Ticket\(s\)](#) | [Export Threads](#) | [Export Selected Threads](#) | [View](#)

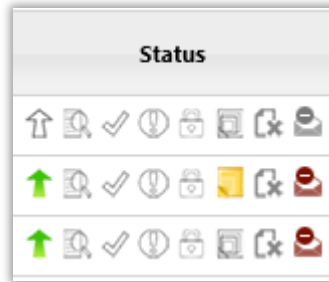
Actions

The Actions Options at the bottom of the Threads list provides access to a large number of actions that you can perform on a thread (or multiple threads).







Columns



Status

The Status Column is directly to the right of the thread selection checkboxes and displays status indicator icons.




Write in the definitions of each of the icons below as your instructor tells you.

Icon	Definition
	<i>A ticket has been assigned to the team.</i>
	<i>The thread is currently being monitored.</i>
	<i>The thread has been answered.</i>
	<i>The thread has been flagged in the forums as containing abuse.</i>
	<i>The thread is locked.</i>
	<i>The thread has been made a sticky.</i>

Icon	Definition
	<i>The thread has been closed.</i>
	<i>The thread has a private message.</i>

What does this status mean? Look at each icon:



 Information to be shared with CSRs

Answers (active icons from left to right)

- Thread has been assigned (ticket has been created)
- Thread has been made sticky
- Thread has private message

Which image below shows the following statuses for a thread?

- Thread has been answered
- Thread has a private message
- Thread has been closed
- Thread is “sticky”



Answer: the first image

Subject

The Subject column contains the name of the thread as it appears in CPS. If you click the link, the thread opens in a new window, allowing you to work in the CPS environment while still within CAT.

Subject
How can I remove an MCP from a competency?
Test - Riyaz
map membership
Cannot Install Microsoft KB 2517329 Erro...
PPTP VPN SBS 2008 stall at verifying use...
ActiveSync error on one user
IIS Manager very slow on first use when ...
SQL Server replication counters not work...
Remote Desktop Client License
Removing the first Exchange 2003 server



CAT

CPS Thread visible from within CAT

Informational Columns

Informational columns vary depending on what you have chosen to view.

Information to be shared with CSRs

Provide these examples to agents and have them write the list down.

1. The external status of the thread
2. The labor time invested in that thread
3. The thread's age
4. Idle post time (how long the thread has been idle since its last reply)
5. Initial response time
6. How many replies the thread has received
7. How many times the thread has been viewed


List seven possible things that these columns might tell you:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

Idle Working Hours Column

Idle Working Hour
7h 12m
32h 53m
33h 47m
120h 25m

Idle Working Hours indicates the difference between the last reply to the thread was posted and the current time. How are these hours calculated?



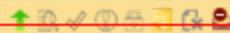
 Information to be shared with CSRs

Idle working hours calculations are based on the Partner's country time zone.

Use this information to effectively manage your work without affecting the SLA. Sort your search results by the "idle working hours" column to work on the threads with the longer "idle working hours" first. This column is always available.

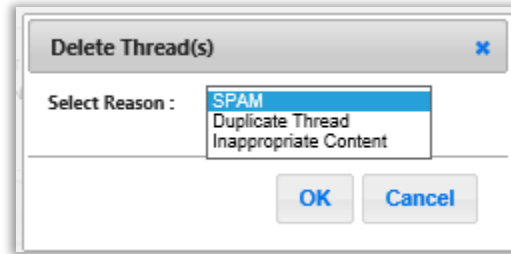
Deleted Threads

If a thread is deleted for any reason, the thread appears in the Thread list with a strikethrough. However, if one post in the thread is deleted due to abuse, the thread will still appear in a deleted search list, but it will not have a strikethrough.

Select Thread(s)	Status	Subject	Labor
<input type="checkbox"/>		Cannot Install Microsoft KB 2517329 Erro...	0m
<input type="checkbox"/>		map membership	2m
<input type="checkbox"/>		Test - Riyaz	20m

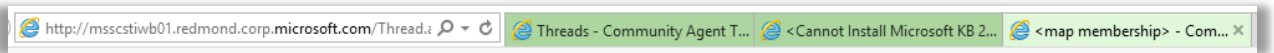
Threads may be deleted (or un-deleted) by clicking that option under the Threads list. If you choose to delete a thread, you must provide a reason.

[Make Sticky](#) | [Unmake Sticky](#) | [Bulk Reply](#) | [Close Thread\(s\)](#) | [Reopen Thread\(s\)](#) | **[Delete Thread\(s\)](#)** | [UnDelete Thread\(s\)](#) | [Update/Monitor Thread\(s\)](#) | [Unmonitor Thread\(s\)](#) | [Create Community Ticket\(s\)](#) | [Export Threads](#) | [Export Selected Threads](#) | [View](#)




Viewing Multiple Threads

CAT lets you open multiple threads at once. When you double-click on a thread, that thread opens in a new browser tab. This makes it convenient for you to work multiple threads simultaneously, and for when a task requires that you have more than one thread opened).



Preferences and Profiles

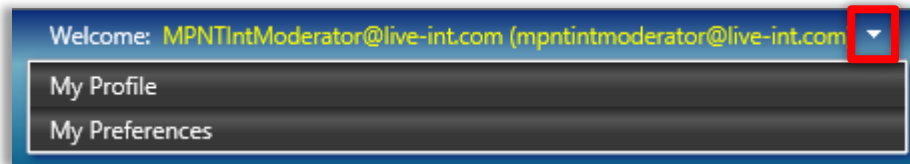
 *Helpful instructor information*

This section should take approximately 5 minutes to complete.

The drop down menu adjacent to your user name at the top right side of the CAT interface give you access to your preferences and profile settings. The Preferences page lets you configure alerts. The Profile page lets you select a small number of CAT options.

My Preferences (Alerts)

CAT lets you customize a set of alerts that will notify you whenever a thread meets the criteria described in that alert. To view the My Preferences page, click the downward facing triangle next to your username at the top right of the CAT page.



After clicking My Preferences, the **My Preferences > Alerts Settings** page appears. Click the Alerts you would like, then click Save.

My Preferences

Alerts Settings

Select Alert(s)	Alert Type
<input type="checkbox"/>	Monitored Threads With New Replies
<input checked="" type="checkbox"/>	Monitored Threads With New Answers
<input type="checkbox"/>	Monitored Threads Recently Marked UnAnswered
<input checked="" type="checkbox"/>	Monitored Threads With Out Response For Half Of Time Interval
<input checked="" type="checkbox"/>	My Tickets Exceeded Or Close SLA
<input checked="" type="checkbox"/>	Tickets Assigned To Me To Accept Ownership
<input type="checkbox"/>	Tickets Escalated To Me
<input type="checkbox"/>	My Open Tickets With Thread Answered
<input type="checkbox"/>	New Tickets Assinged To My Teams
<input type="checkbox"/>	Tasks Assigned To Me
<input type="checkbox"/>	My Tasks Beyond Due Date
<input type="checkbox"/>	Rejected Tasks Assigned By Me

Save
Select All
Clear All

Having configured alerts, an alerts icon appears in the CAT Toolbar. Active alerts are indicated by a red circle containing a number. The number tells you the number of threads that match the alert criteria.



You can hover over the Alerts icon to see your list of alerts. Notice that the Alerts icon shows you the total number of threads that have triggered an alert. The menu shows you which alerts have been triggered and how many threads are affected. In this case, the Alert applies to one thread.



Note:

If the Alerts icon does not display in CAT, it is because you have not used the **My Preferences** page to set up any alerts. Once you have created an alert, the alerts icon will appear.

My Profile

From the drop down menu next to your name, select **My Profile** to view your Public and Private profiles.



Your Public Profile lets you change your time zone, select right to left text orientation, and enable “turn on labor timer automatically” when you work a ticket or task. You will hear more about the labor timer later in the course.

UserProfile

Public Profile Private Profile

CPS Person ID:	4d6fa6b5-b981-45fa-8eaa-ee5eef8803a9
Local Time Zone:	(UTC+08:00) Beijing, Chongqing, Hong Kong, Urumqi
Thread Default Search Profile:	[Not Set]
Ticket Default Search Profile:	[Not Set]
Right-to-Left direction:	<input type="checkbox"/> Enable Right-to-Left for thread title and forum/product name
Turn on Labor Time by Default:	<input type="checkbox"/> Enable turn on labor timer automatically
Roles:	<ul style="list-style-type: none"> • ForumEngineer in team mpn_uat_narsc_team • TeamAdmin in team mpn_uat_narsc_team

Save


Your Private Profile is read only and is configured by your manager.

UserProfile

Public Profile **Private Profile**

Personnel Number:	-1
User Alias:	
User Name:	MPNTIntModerator@live-int.com
User Status:	Active
Hire Type:	Vendor
Cost Center Code:	N/A
Hiring Date:	
On Board Date:	2012-11-28
Quit Date:	
Reporting Manager Alias:	N/A
Reporting Manager Name:	N/A
Company Name:	Unknown
City:	Unknown
State:	Unknown
Country:	Unknown

Tickets


 *Helpful instructor information*

This section should take approximately 10 minutes to complete.

CAT uses an automated system that assigns a ticket to each Partner thread. This section explains how to view and interpret your team’s tickets and your own tickets.

Tickets let you document your work on a thread in a variety of ways that are not visible to Partners. They also let you take actions on a ticket. There is a new ticket for each thread. A closed ticket (for an answered thread) can be re-opened if a thread has additional new activity that requires RSC Agent action.

List three things that Tickets allow you to do:

 *Information to be shared with CSRs*

- *Document your troubleshooting*
- *View and edit labor spent on a ticket*
- *Perform other thread management tasks where direct communication with the Forums user (Partner) is not necessary*

1. _____
2. _____
3. _____



You may hover over the Tickets icon to bring up the menu below. Then click either “My Tickets” or “Team Tickets” depending on whether you would like to view tickets you own or tickets that have been assigned to your team (more details on ticket ownership and assignment are below).



Once you have your ticket list, click on a ticket **Subject** link.

My Tickets Found: 1 ticket(s). Your labor minutes today: 4, UT: 0.83 %

Select Display Columns

Select Ticket(s)	Subject	Ticket No.	Owner	Ticket Status	Labor	Age	Idle Log Time	Init
<input type="checkbox"/>	Cannot Install Microsoft KB 2517329 Error States ...	724950	MPNIntModerator@live-int.com (mpntintmoderator@live-int.com)	Open:Accepted	4m	21d 1h 14m	19m	N/A

[Reopen](#) | [Reassign](#) | [Release](#) | [Resolve](#) | [Unresolve](#) | [Accept](#) | [Reject](#) | [Clear Follow-up Flags](#) | [Export Tickets](#) | [Export Selected Tickets](#) | [View](#)

Take Ownership | Release | Accept | Reject

The ticket window appears.

Ticket No.724950 *Cannot Install Microsoft KB 2517329 Error States ...* 00:00:00

[Ticket Detail](#) | [Thread Detail](#) | [History](#) | [Notes](#) | [Labor](#) | [Quality Review](#) | [Customer Info](#) | [Tasks](#) | [Content Management](#) | [Partner Info](#)

Basic Information

Service Level Agreement Expired In: 14 days 21 hours 13 minutes [Save](#)

Ticket Status: Open:Accepted

Ticket Owner: User[MPNIntModerator@live-int.com (mpntintmoderator@live-int.com)]

Create Reason: Managing Queue

Unanswered Reason: Select a Unanswered Reason

Custom Flag: Select a Custom Flag

Follow Ups: N/A

Tag Names:

Initial Response Time Target: 1d

Service Level Agreement Target: 4h

Issue Type Code: Select an Issue Type

Solution By: Select a Solution By

Comments:

Summary:

Market Share | Survey Candidate | Content Candidate

Call Code - Recent History: Select an Item

Call Code: (Not Selected)

Current Call Codes:

Labor Length: Minutes

This Labor is only for "Content-Call Code", for logging other labor types, please go to "Labor" Tab.

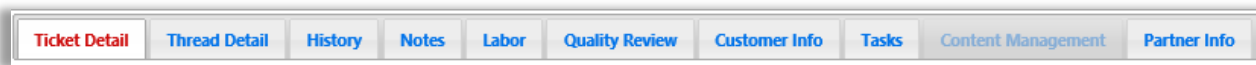
Ticket Actions

[Reassign](#) | [Resolve](#) | [Unresolve](#) | [Create Task](#)

Total Labor(Minutes): 4m
 Initial Response Time: N/A
 Number of Replies: 0
 Assessed: false
 Views: 1
 Thread Created: 2012-11-14 07:47:28
 Ticket Created: 2012-11-29 03:01:30
 Ticket No.: 724950
 Thread Id: e5a279e-421e-46ad-93b1-b6b15ac5422a

The second column from the left (Thread Detail) includes the original text of the thread and all replies entered into CPS. You may reply right in this window (shown below).

Here is a close-up view of the other tabs. You will see more on each tab in the next section.




Automated Tickets

CAT automatically assigns tickets to a team, based on a set of ticket creation rules defined for that team (these rules are set up as part of the team’s search profile). This profile should be set up by the team manager. When the conditions are met that satisfy the search profile, an automated ticket is generated.

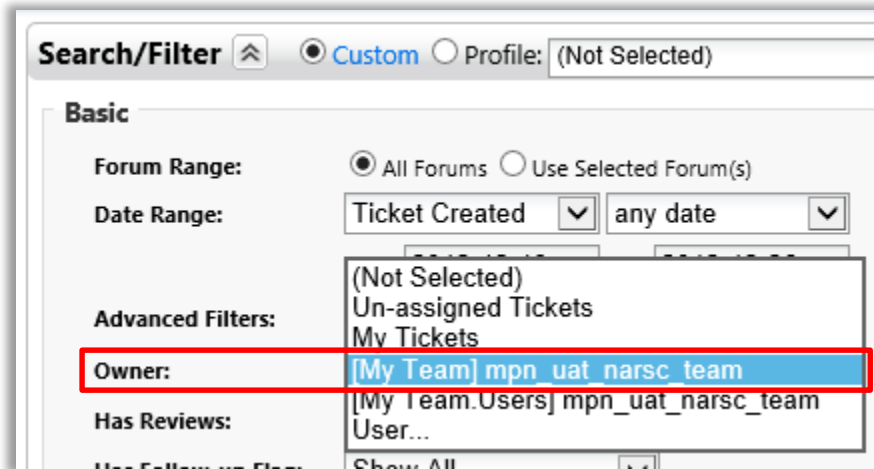
View the Team Tickets List

The Team Tickets List lets you view all of the tickets assigned to your team. Tickets are assigned automatically to the team that is managing the forum. The team lead monitors the Team Tickets list, but does NOT assign tickets to RSC Agents. Agents should take ownership of the oldest ticket in the Team Tickets list.

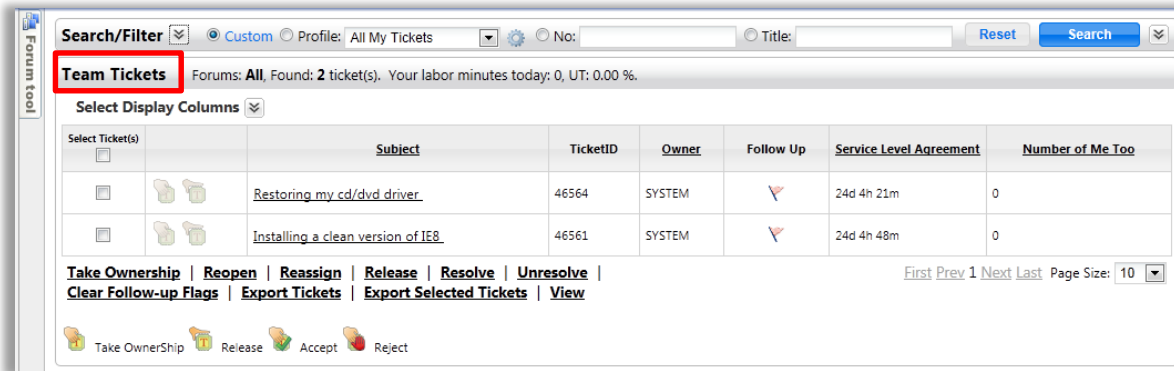
To view the Team Tickets List, go to the Search/Filter pane, select the Owner dropdown menu, and then select My Team. Click Search.

 *Information to be shared with CSRs*

Remember that you can access the Team Tickets List by hovering over the Tickets button in the CAT Toolbar and selecting Team Tickets. However, to begin to understand how the tickets list is generated, let’s use the Search/Filters option to load the Team Tickets List.

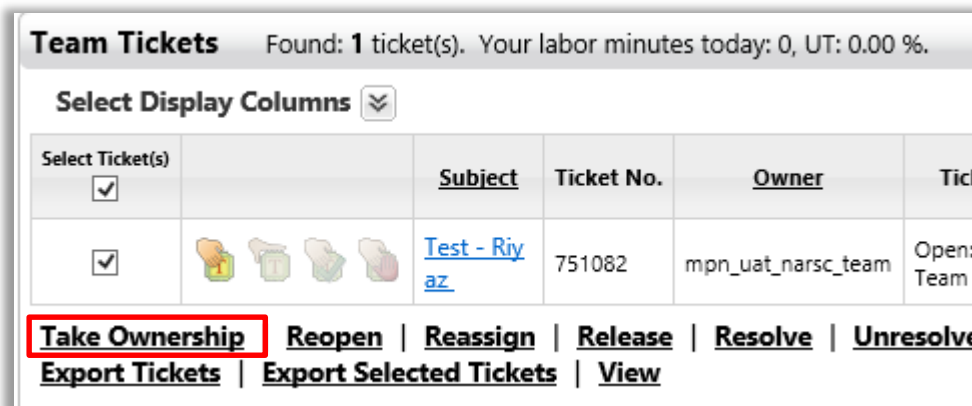


Your Team Tickets List loads.



Take Ownership of a Ticket

- You can take ownership of a ticket by clicking the Take Ownership button directly in the Ownership Column. Both are visible in the image above.
- Alternately, you can select multiple tickets and then use the Take Ownership Link below the Team Tickets List to perform a bulk accept.

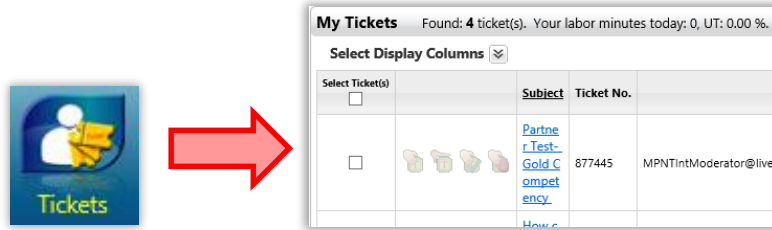


View the My Tickets List

To view tickets that you have taken ownership of, open the My Tickets List.

There are several ways to do this.

- From the CAT Toolbar, click the Tickets icon. The default action is to open the My Tickets List where the default search profile has selected YOU as the owner. This list displays tickets that you have taken ownership of.



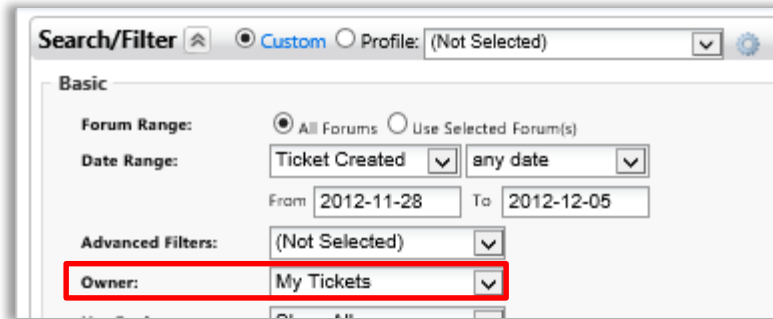
- However, you can also hover over the Tickets button in the CAT Toolbar. A fly-out appears that lets you select My Tickets. This selects the same search profile as clicking the Tickets button.



- Links to My Tickets and Team Tickets are also available as cards found on the CAT homepage.



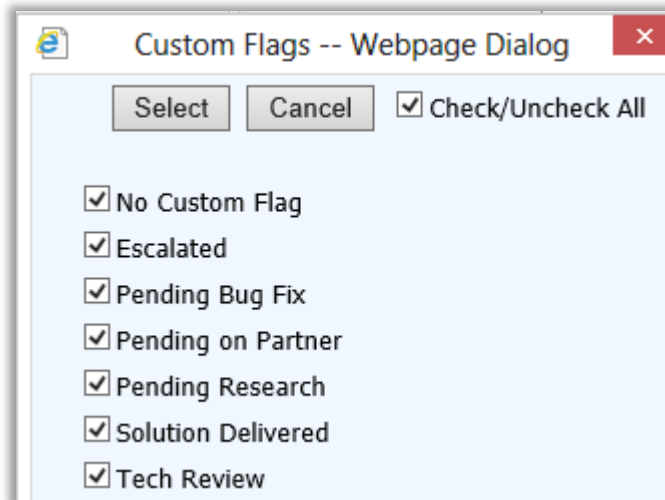
- You can also create a custom search in the same way that you created a custom search for a thread. To use this method, click the chevron that is to the right side of Tickets Search/Filter, and select My Tickets from the Owner option list.



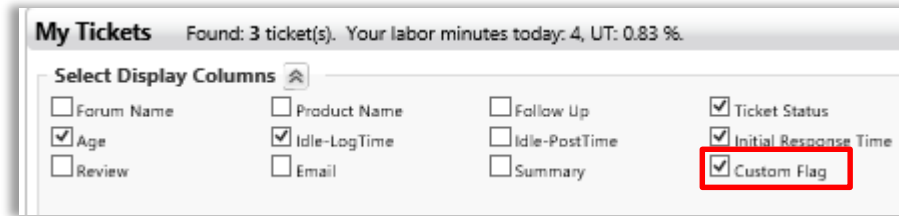
Custom Flags

You can specify one or more Custom Flag values by which you can search the tickets.

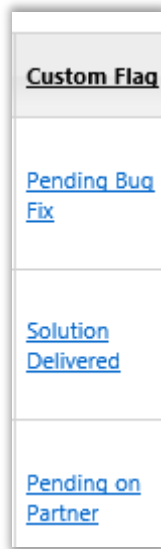
There is no set way to use these flags. Use them to effectively manage your work. For example, if you are working on multiple tickets, you may want to work on tickets with the "pending on partner" customer flag before you work on tickets with the "solution delivered" custom flag.



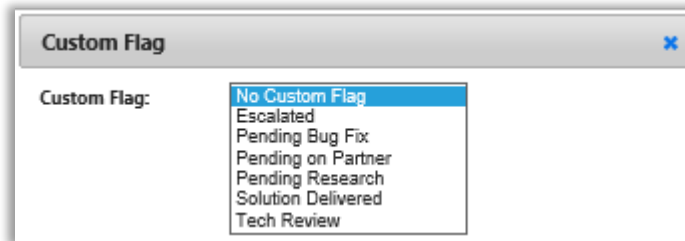
Select **Custom Flag** in the display column options for a ticket in order to see the custom flags that have been assigned to the tickets in the search results.



The Ticket Search result pane will add an additional column, Custom Flag.



You can change the custom flag by clicking link in the Custom Flag column for the specific ticket (as shown above). A dialog box appears where you can select another flag from the list and then click **Submit**. The flags that you see differ according to your environment.



The My Tickets List

The My Tickets List shows you the tickets that you own. From the My Tickets List, you can click a ticket name in the Subject column title to open and review the ticket in a new window. Once the ticket has been reviewed, you may close that window and return to the My Tickets List. As you can see, the Team Tickets List looks much like the My Tickets List. Both are just predefined search profiles.

My Tickets Found: 3 ticket(s). Your labor minutes today: 4, UT: 0.83 %.

Select Display Columns

Forum Name Product Name Follow Up Ticket Status External Status Thread Created
 Labor Age Idle-LogTime Idle-PastTime Initial Response Time Service Level Agree
 Replies Views Review Email Summary Custom Flag

Select Ticket(s)		Subject	Ticket No.	Owner
<input checked="" type="checkbox"/>		Cannot Install Microsoft KB 2517329 Error St ates	724950	MPNTIntModerator@live-int.com (mpntintmoderator@live-int.com)
<input checked="" type="checkbox"/>		map membership	751081	mpn_uat_narsc_01 (mpn_uat_narsc_01@live-int.com)
<input type="checkbox"/>		Test - Riyaz	751082	mpn_uat_narsc_02 (mpn_uat_narsc_02@live-int.com)

[Take Ownership](#) | [Reopen](#) | [Reassign](#) | [Release](#) | [Resolve](#) | [Unresolve](#) | [Clear Follow-up Flags](#) | [Export Tickets](#) |
[Export Selected Tickets](#) | [View](#)

Take Ownership Release Accept Reject

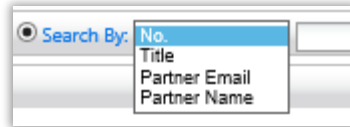
Note that you can Release ownership of a ticket just as you can Take Ownership (see the icons above). This returns the ticket to the Team Ticket list. A Team Manager may reassign tickets as needed, such as when an agent is sick or does not have the expertise to resolve an issue that another agent can resolve.

Other actions available in the menu underneath the ticket list include:

- **Reopen** a previously closed ticket
- **Reassign** a ticket
- **Resolve** a ticket
- **Unresolve** a ticket
- **Clear Follow-up Flags:** Whenever there is a change to a thread, such as a response on the thread marked as Helpful or Me Too, a Follow Up flag is set on the thread. This option lets you clear that flag.
- **Export tickets:** This auto-selects all tickets in your list and exports to Excel. Alternately, you can select a group of tickets (select their check boxes) and click **Export Selected Tickets** to pull a subset of your tickets list into Excel.
- **View:** This provides the same access as double clicking the ticket title in the Subject column.

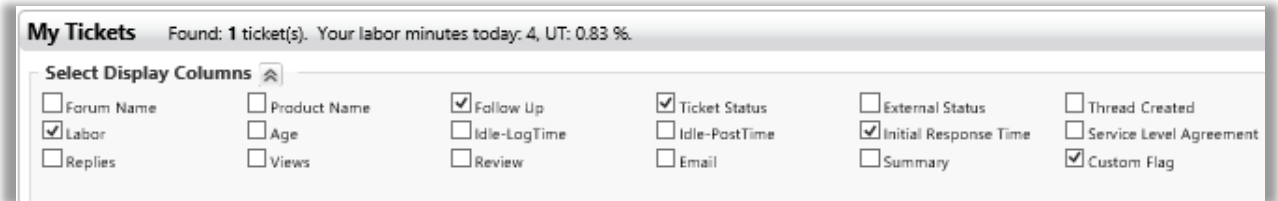
“Search By” Options

If you know the ticket number or the title of a ticket, you can find that ticket using the search by Ticket Number or search by Ticket Title fields. Simply select the appropriate radio button, enter you text or numeric value, and click Search. You may also search by Partner Name or Email (as you can with a thread).



Customizing the Tickets List Columns

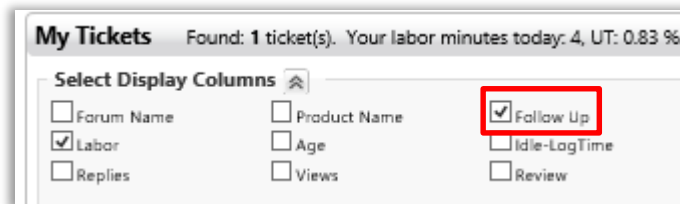
Like the Threads List, you have the ability to customize the display columns that appear on your tickets page.




Information to be shared with CSRs

This is the same as customizing the Threads List columns: Click the downward pointing chevron next to the Select Display Columns heading to expand the customization options. Check the columns that you would like to display and uncheck those that you do not want displayed. Then click the Search button to load the changes.

To see tickets that have been marked with a follow up flag, customize your ticket columns and make sure that you have selected Follow Up.




Interpreting Tickets

 *Helpful instructor information*

This section should take approximately 20 minutes to complete.

This section explains how tickets are used to manage threads by performing actions on their associated tickets.

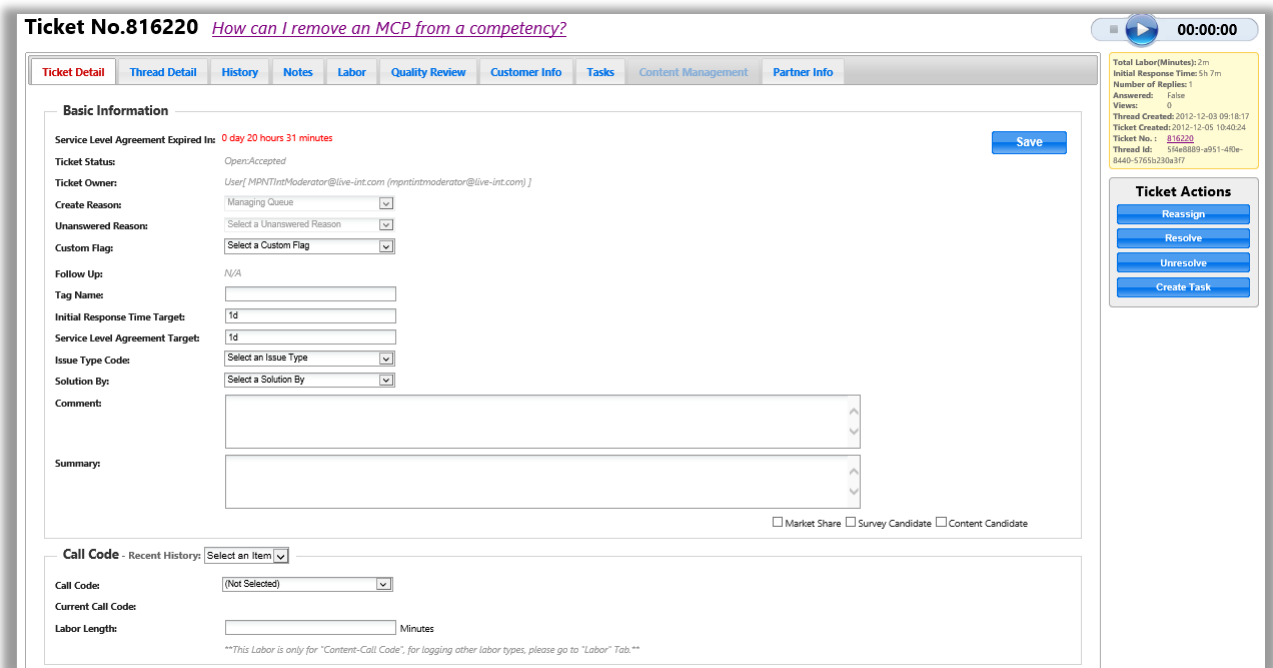
Ticket Documentation Tools

 *Information to be shared with CSRs*

Now that you know how to search for, filter, and view tickets, let us look at how you can use them to manage threads.

Tickets provide you with a convenient and effective way to document and track your activity on a thread. Tickets are composed of action tools that allow you to perform various actions on a ticket, and a set of Ticket Documentation Tools that you use to log your progress on the ticket and document your work. Let us look at each of the tabs in the ticket.

Ticket Details



Ticket No.816220 *How can I remove an MCP from a competency?*

00:00:00

Total Labor(Minutes):3m
Initial Response Time:5h 7m
Number of Replies:1
Answered: false
Views: 0
Thread Created:2012-12-03 09:18:17
Ticket Created:2012-12-05 10:40:24
Ticket No.: 816220
Thread Id: 51ae8889-a951-480e-8440-5765b230a317

Ticket Actions

- Reassign
- Resolve
- Unresolve
- Create Task

Basic Information

Service Level Agreement Expired In: 0 day 20 hours 31 minutes Save

Ticket Status: Open:Accepted

Ticket Owner: User[MRN\TintModerator@live-int.com (mrntintmoderator@live-int.com)]

Create Reason: Managing Queue

Unanswered Reason: Select an Unanswered Reason

Custom Flag: Select a Custom Flag

Follow Up: N/A

Tag Name:

Initial Response Time Target: 1d

Service Level Agreement Target: 1d

Issue Type Code: Select an Issue Type

Solution By: Select a Solution By

Comment:

Summary:

Market Share Survey Candidate Content Candidate

Call Code - Recent History: Select an Item

Call Code: (Not Selected)


Current Call Code:

Labor Length: Minutes

This Labor is only for "Content-Call Code", for logging other labor types, please go to "Labor" Tab.

The **Ticket Details** tab provides information on the status of the ticket.

What type of information is available here?

 *Information to be shared with CSRs*

1. The status of the ticket (For example, is the ticket open or closed?)
2. Who owns the ticket?
3. The reason that a ticket was opened
4. Unanswered reason: If the thread was closed as unanswered, you will select a reason code from this list.
5. Custom Flag: Displays the Custom Flag that you set on your ticket. From this list, you can also view or change a custom flag for the ticket.

1. _____
2. _____
3. _____
4. _____
5. _____

Ticket Detail Fields

Basic Information

Service Level Agreement Expired In: **14 days 23 hours 18 minutes**

Ticket Status: Open:Accepted

Ticket Owner: User[MPNTIntModerator@live-int.com (mpntintmoderator@live-int.com)]

Create Reason:

Unanswered Reason:

Custom Flag:

Follow Up: N/A

Tag Name:

Initial Response Time Target:

Service Level Agreement Target:

Issue Type Code:

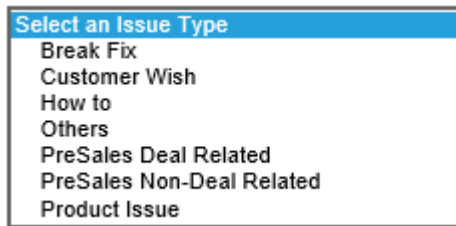
Solution By:

Here is a close-up of the ticket detail fields. Write in the definitions of the following fields, which may not be familiar to you:

Field	Description
Initial ReponseTime Target	<i>This is when the ticket should first be responded to</i>

Field	Description
Service Level Agreement Target	Set an SLA for this ticket. When you set an SLA, you will be alerted when your ticket has exceeded or is close to exceeding the SLA date. (However, you must have configured an alert to do this.)
Issue Type Code (list)	This list lets you select an issue code appropriate to the ticket
Solution By (list)	This menu lets you select the role of the person who provided the solution to the thread. For example, if a user provided a reply that is selected as an answer, you would select Solution by - MSCommunity User. If you provided the solution, select Solution by - MSFT CSS. If an MVP provided the answer, select Solution by - MVP.

Drop-down lists of Issue Type and Solution By fields:



Fields beneath the above list:

- The **Comment** field lets you keep a continuing log of notes in the ticket.
- The **Summary** field provides a place for you to summarize the issue and its resolution before you close the ticket.

Comment:	<input type="text"/>
Summary:	<input type="text"/>

Once you complete the ticket updates, remember to click **Save** before moving to another tab.

The History Tab

The History tab provides a history of activity on the ticket. For example, if you enter notes in a ticket, change the value of a drop-down menu from within a ticket, or create a task, that activity is recorded and exposed in the History tab.

Ticket No.724927 *Remote Desktop Client License*

Ticket Detail Thread Detail **History** Notes Labor Quality Review Customer Info Tasks

Content Management Partner Info

User Name : Start Date: End Date:

Ticket History

Changed By	Create Date	Description
MPNTIntModerator@live-int.com (mpntintmoderator@live-int.com)	2012-12-05 10:42:59	Create a new ticket by [MPNTIntModerator@live-int.com] and assign to [self]; Ticket current status[Open:Accepted];

« < 1 > » 10 ▾

Task History

There is no related task history information!

« < > » 10 ▾

The Notes Tab

The Notes tab provides a place for you to enter new notes and review previously entered notes.

Ticket No.724927 *Remote Desktop Client License*

Ticket Detail Thread Detail History **Notes** Labor Quality Review Customer Info Tasks

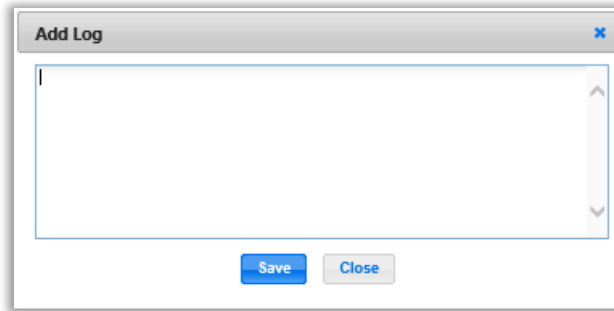
Content Management Partner Info

Log

No data currently!

- » Bug
- » Compliment
- » FAQ
- » DCR

The Ticket Log (click Add Log above) lets you add notes to the ticket.

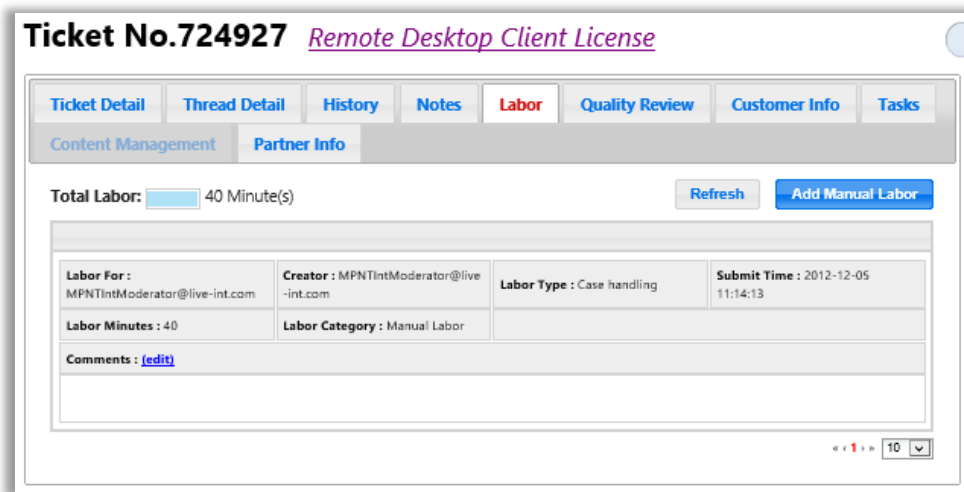


The rest of the Notes areas are as follows:

- **Ticket Log:** This is a place for you to log notes of a general nature against the ticket.
- **Bug:** If a ticket has identified a bug in a product, you can submit the bug details here.
- **Compliment:** If you receive a compliment from a community user for the support you provide, copy and paste it into the Compliments field.
- **FAQ:** If you believe that a resolution for an issue posted to the forums would be a good candidate for an FAQ, post the Q&A pair to the FAQ Detail field.
- **DCR:** DCR is a change request. Any change request for the product would be provided here with details about where (usually a bug database) it was logged. Status will also be provided.

The Labor Tab

The Labor tab provides a summary of the captured labor time logged against the ticket as well as giving you the opportunity to add labor to this time using the Add Manual Labor button.



You will learn more about using the labor viewing and input tools later in the course.



Note:

RSCs do not use the Quality Review tab (the next tab), as they provide surveys instead to Partners.

The Tasks Tab

If tasks have been created for this ticket, they will be summarized under the **Tasks** tab. Notice that you can accept or reject open tasks here. You will learn about tasks in the next section.

Task ID	Task Title	Task Status	Assigned By	Ticket Status	Assignment Comments	Due Date	Created Date
5	New Task test	Open:Pending	West, William H	Open:Accepted	Just a test	2012-03-21 00:00:00	2012-03-05 18:48:50

Partner Info

The Partner Info tab at the far right has information such as Partner ID, Organization Name, Country, and Program information.

Name: George Rhine **Email:** georgerhine@cnsnw.com **Country:** USA

Partner ID: 646517 **Organization Name:** Computer & Network Solutions Inc **City:** LAKE OSWEGO **Company URL:** http://www.cnsnw.com

Program Cell Type	Program Cell ID	Program Cell Name	Start Date (UTC)	End Date (UTC)
Sub Programs of PMC	90	Microsoft Action Pack Solution Provider	9/4/2012 7:54:55 AM	9/9/2013 11:59:59 PM

Partner ID: 1139144 **Organization Name:** Computer & Network Solutions Inc **City:** LAKE OSWEGO **Company URL:** http://www.cnsnw.com

Program Cell Type	Program Cell ID	Program Cell Name	Start Date (UTC)	End Date (UTC)
PMC Program Tier	14	Registered Member	7/19/2012 6:59:57 AM	9/15/2013 11:59:59 PM

Ticket Actions

Now that you are familiar with the documentation and reference capabilities of the CAT Ticket, let's look at the ticket tools that are available for you to use.

Start by opening a thread that has a ticket attached to it by clicking on the Subject line. Recall that the green arrow status icon indicates a ticket has been automatically assigned to the thread.

Status	Subject
	How can I remove an MCP from a competency?

Next, click the ticket number found in the Information Box at the right of the thread window. You will work in the ticket windows (which you have just seen) and not the thread windows.

The window refreshes and the ticket tabs are now visible. Make sure you are in the Ticket Details tab and then locate the Ticket Actions box.

The Ticket Actions box provides you with several tools. This list may vary depending on the situation. Some options are shown below:

Ticket Actions

- [Reassign](#)
- [Release](#)
- [Resolve](#)
- [Unresolve](#)
- [Create Task](#)
- [Escalate](#)


Ticket Actions

- [Reassign](#)
- [Resolve](#)
- [Unresolve](#)
- [Create Task](#)

Release

Some occasions warrant returning tickets that you own back to the Team Tickets list. In these situations, you want to ensure that your tickets are picked up and resolved by others.

Releasing the ticket returns it to the Team Tickets list where others can accept ownership of the ticket and resolve it.

 *Information to be shared with CSRs*

See if agents can come up with any examples of when they would need to release a ticket. Provide these examples if they do not come up with them on their own:

- When you need to leave work early and a ticket must be resolved
- When you must be away from work for a few days

Name two examples when you might want to release a ticket.

- 1) _____
- 2) _____

Resolve

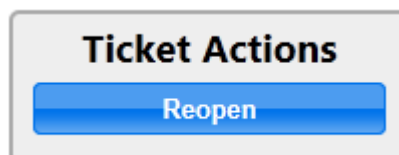
When you have finished working the ticket and the issue has been resolved, click the **Resolve** button to close the ticket. The following notice appears on the ticket and a Reopen button appears under Ticket Actions.



When you click **Resolve**, the following dialog box is displayed. You must select how the ticket was resolved and then click **Resolve**.



You can return to the ticket later and reopen it by clicking the **Reopen** button.





Note:

A dimmed, grayed-out labor timer appearing in a community indicates that the ticket has been marked as resolved. The timer will only be available in an open ticket.

Unresolve

If the ticket cannot be resolved, you can close the ticket using the **Unresolve** button.

The dialog box titled "Unresolve Ticket" contains a dropdown menu for "Unanswered Reason" with "No reply from customer" selected. Below the dropdown are two buttons: "Unresolve" and "Cancel".


You have the following list of reasons for closing the ticket.

The dialog box shows the "Unanswered Reason" dropdown menu open. The options listed are: Coding required, Coding required, Technical difficulty, None technical, OP not follow up, and Other. The "Unresolve" button is partially visible.

After you select the reason for closing the ticket, you must select how you are closing the ticket from the **Close As** list.

The dialog box shows the "Close As" dropdown menu open. The options listed are: Not Resolved, Not Resolved, Broken/Duplicated, Customer Discontinued, Customer Rejected Solution, Customer Unresponsiveness, Escalated, No Action Needed/Spam, and Not supported. The "Unresolve" button is partially visible.

Tasks

 *Helpful instructor information*

This section should take approximately 10 minutes to complete.

This section introduces tasks, which are sub-divisions of a ticket.

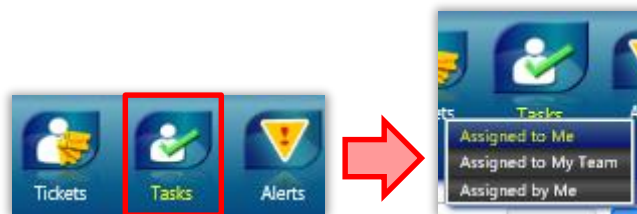
What Is a Task?

A Ticket describes a broad issue that must be addressed before the thread can be resolved. However, there may be unique sub-components of an issue that need to be completed individually before the ticket can be closed. To help manage these smaller jobs, you can create a Task. A task may be created for each reply within a thread.

Tasks represent unique actions that must be completed before a ticket can be considered resolved. These tasks can be assigned to others (and others can assign them to you). This might happen if you would like another agent to provide particular information without giving them ownership of the entire thread.

My Tasks

Tasks that have been assigned to you by others appear in the My Tasks List. To view the My Tasks List, click Tasks in the CAT Toolbar. The drop-down list on the right appears.



A link to your Tasks list is also available as a card found on the CAT home page.




The My Tasks workspace is relatively simple compared to the Threads and Tickets workspaces. There is no customization of column fields, no ability to search, and no icons.

From the My Tasks list, you may do three things. What are they?

1. _____

2. _____
3. _____

 **Answers:**

- View the Task by clicking the task title
- Accept the task
- Reject the task

You can also see the name of the person who assigned the task to you, as well as assignment comments (giving you a quick glance into the task). The due date and other information, such as the parent ticket number and Task ID, are also available here. To view the parent ticket, click on the ticket number link (the third column).

My Tasks

<input type="checkbox"/> Select Task(s)	Task Id	Ticket Number	Task Title	Task Status	Assigned By	Ticket Status	Assignment Comments	Due Date	Created Date
<input type="checkbox"/>	4	46750	Outlook settings to work with IE9	Open:Pending	Crayton, Maxwell Sloan	Open:Accepted	I need help with the Outlook settings to work with IE9.	2012-02-29 00:00:00	2012-02-20 18:11:53

Accept Task(s) | Reject Task(s) « < 1 > » 10

View the Task

Click the **Task Title**, and the task details open in a new browser window.

There are three task tabs, which are inactive until you take ownership of the task. The task number (at the top left) and the timer (at the top right) are displayed on all three tabs.

Task No.1 *need help* 00:00:00

Task Details | Labor | Notes

Ticket #: [91109](#) Accept Reject Update

Ticket Title: Lillian's test 2--anyone else please donot update it(create ticket/task, reply, mark answer...)

Task Title: need help


Task Type: Technical Assistance

Assigned To: SYSTEM Steve Smith

Assignment Comments: kkkk

Due Date: 2012-02-29

Proposed Suggestion:

 **Information to be shared with CSRs**

Explain the following tabs and have the agents write it down.

1. **Task Details:** This tab summarizes the Task status. All fields except the Proposed Suggestion field are dimmed, as these are controlled by the Ticket owner. The only active components are the Ticket Number link (which lets you view the parent ticket) and the Accept, Reject and Update buttons.

2. *Labor: This tab provides a summary of the labor time logged against the task and the ability to add manual labor entries (more on labor later). Make the point that, in most cases, you will use the labor timer to report time. But, in some instances you must manually add (or remove) time from your labor logs. The Labor tab lets you do this.*
3. *Notes: This tab lets you view and enter notes for relevant to the task. You can also edit and delete notes that you create.*

Fill in the definitions of the fields below as your instructor tells you.

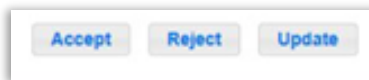
1. Task Details:

2. Labor:

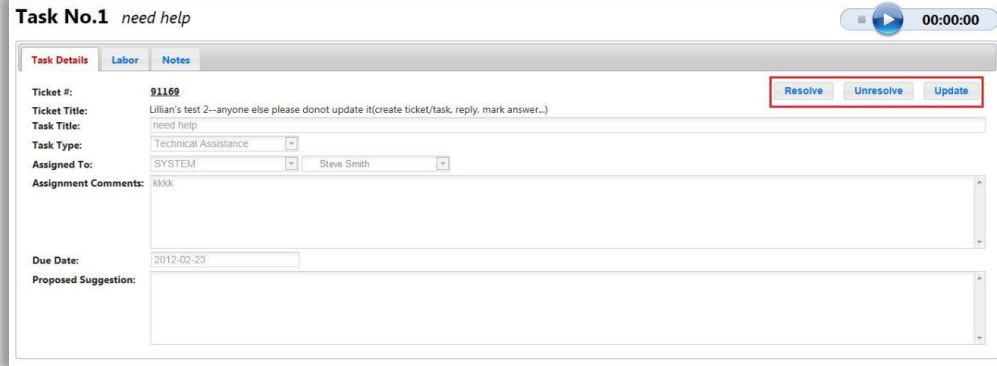
3. Notes:

Accept the Task

Click Accept on the top right of the Task Details tab to accept a task.

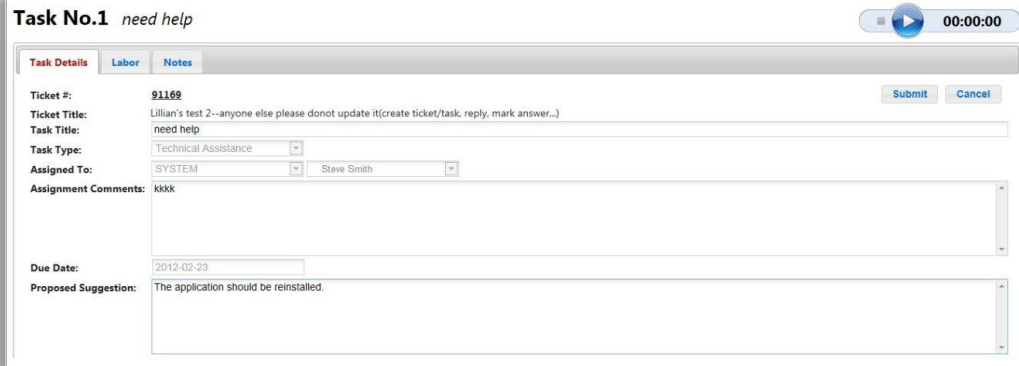


The Task Details tab is then refreshed and the Accept and Reject button have changed to Resolve and Unresolve. Note that the Update button is here as well. The Task Details fields remain dimmed.



As you work the task, you may need to edit or update the task. Click **Update** and the Assignment Comments field becomes editable.

Submit and **Cancel** buttons where the Resolve, Unresolve and Update buttons were previously. Type your comments in the field and then click the **Submit** button to save them.




The task can be *resolved* (closed with a successful solution) or *unresolved* (closed without a solution).

Resolve

Click Resolve on the Task Details tab to resolve the task. When you click Resolve, the Reason drop down is populated with Solution Found and the Proposed Solution field becomes editable.

Unresolve

If you are unable to find a solution for the task assigned to you, it can be closed as unresolved. From the Task Details tab, click Unresolve. The Reason dropdown becomes active and there are several options from which to choose.

 *Information to be shared with CSRs*

For example, if the issue exceeds your technical ability, you would select, Beyond Technical Expertise. If there is no resolution, you would select No Solution Available. The Proposed

Solution field becomes active, and you must provide notes explaining your reason for closing the task as unresolved.

When you Resolve (or Unresolve) a task, it is removed from your task list.

Reject a Task

When you reject a task, the task is returned to the ticket owner. As no confirmation is provided, you must summarize why you are rejecting the task in the **Notes** tab. This can be done either before or after rejecting the Task.

You can also bulk accept or bulk reject assigned tasks by selecting multiple checkboxes and clicking Accept Tasks or Reject Tasks.

Create a Task

You may create a task at the bottom right of the ticket window, under **Ticket Actions**.

The screenshot shows the Microsoft Dynamics CRM interface for Ticket No. 751081, titled "map membership". The interface includes a top navigation bar with tabs for Ticket Detail, Thread Detail, History, Notes, Labor, Quality Review, and Customer Info. Below this is a sub-navigation bar with Tasks, Content Management, and Partner Info. The main area displays "Basic Information" with fields for Service Level Agreement (18 days 02 hours 05 minutes), Ticket Status (Open:Accepted), Ticket Owner (User[mpn_uat_narsc_01 (mpn_uat_narsc_01@live-int.com)]), Create Reason (Managing Queue), Unanswered Reason (Select a Unanswered Reason), Custom Flag (Select a Custom Flag), and Follow Up (N/A). A "Save" button is present. On the right, a "Ticket Actions" panel contains buttons for Reassign, Resolve, Unresolve, and Create Task. The "Create Task" button is highlighted with a red rectangular box. A yellow information box on the right provides details such as Total Labor (9m), Initial Response Time (13m), and Ticket Created date (2012-11-27 06:33:32).

In the Create Task dialog, do the following:

1. Type a Task Title.
2. Select a Task type.
3. Select a Team and an individual for whom the task will be assigned.
4. Enter a Due date.
5. Summarize the instructions for the assignee in the Assignment Comments field.

Create Task

Task Title :

Task Type : Technical Assistance ▼

Assign To : ▼ ▼


Due Date : 11/18/2012 02 ▼ : 40 ▼

Assignment Comments :

Closing Tasks

At some point, an open ticket must be closed. You will learn how to close a ticket later. For now, it is important to understand that when a task is created for a ticket, a dependency is created. The ticket under which the task has been created cannot be closed until after the task has been marked as Resolved.

The Labor Timer

 *Helpful instructor information*

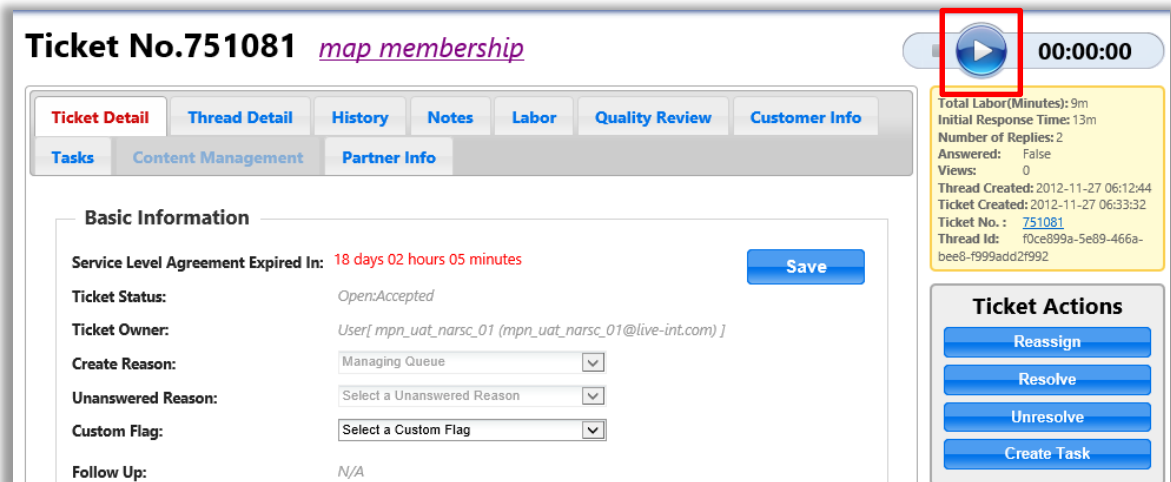
This section should take approximately 4 minutes to complete.

The Labor Timer is used to track the labor time that you spend working on a ticket or task. The lesson helps you understand how to use the labor timer appropriately and alerts you to some of the considerations that must be observed to ensure that the time reported for your work is accurate.

Labor Timer Overview

The Labor Timer is at the right of the Thread window that opens when you click on a thread in CAT. It lets you document the time that you've spent working on a thread, ticket or task. When you start working a thread, click the Start icon (highlighted in red below) to start the timer.

Recall this image from the previous section.



The screenshot shows the interface for Ticket No. 751081, titled "map membership". At the top right, there is a play button icon (the Labor Timer Start icon) highlighted with a red box, next to a timer showing "00:00:00". Below the ticket title are tabs for "Ticket Detail", "Thread Detail", "History", "Notes", "Labor", "Quality Review", and "Customer Info". Under "Ticket Detail", there are sub-tabs for "Tasks", "Content Management", and "Partner Info". The main content area shows "Basic Information" with fields for "Service Level Agreement Expired In" (18 days 02 hours 05 minutes), "Ticket Status" (Open:Accepted), "Ticket Owner" (User[mpn_uat_narsc_01 (mpn_uat_narsc_01@live-int.com)]), "Create Reason" (Managing Queue), "Unanswered Reason" (Select a Unanswered Reason), "Custom Flag" (Select a Custom Flag), and "Follow Up" (N/A). A "Save" button is visible. On the right side, there is a yellow box with ticket statistics: "Total Labor(Minutes): 9m", "Initial Response Time: 13m", "Number of Replies: 2", "Answered: False", "Views: 0", "Thread Created: 2012-11-27 06:12:44", "Ticket Created: 2012-11-27 06:33:32", "Ticket No. : 751081", and "Thread Id: f0ce899a-5e89-466a-bee8-f999add2f992". Below this is a "Ticket Actions" section with buttons for "Reassign", "Resolve", "Unresolve", and "Create Task".

Auto-Start

If it has not already been configured for automatic labor tracking, you can configure the Labor Timer to start when you open a thread. Do this using the controls found in your My Profile panel on the Public Profile tab.

UserProfile

Public Profile Private Profile

CPS Person ID: 31733138-c3ba-41bf-8714-0eeb97fb021d

Local Time Zone: (UTC+08:00) Beijing, Chongqing, Hong Kong, Urumqi

Thread Default Search Profile: [Not Set]

Ticket Default Search Profile: [Not Set]

Right-to-Left direction: Enable Right-to-Left for thread title and forum/product name

Turn on Labor Time by Default: Enable turn on labor timer automatically

Roles:

- [ForumEngineer](#) in team mpn_uat_narsc_team
- [TeamManager](#) in team mpn_uat_narsc_team

Save

You can pause the Labor Timer by clicking the **Pause** button.

Information to be shared with CSRs

Use the Pause button when you take a break, or when you begin working on another thread. If you open other websites or talk to another RSC Agent as part of researching a thread, that is part of the time you spend on a thread, so you should NOT pause the labor timer in that case. It does not matter whether or not you own a ticket. Even if it has been assigned to another RSC Agent, you should use the labor timer to track the time you spend on that ticket. This time still counts as time the RSC spends answering threads, and the goal is to get an accurate picture of how much agent effort is required to respond to a thread.

When should you use the Pause button?

Answer: taking a break, working on another thread

When should you NOT use the Pause button?

Answer: doing tasks that are part of answering a thread, such as talking to another agent about the thread or doing research

Should you track your time working on a thread with the labor counter if you are NOT the person assigned to that thread? Why or why not?

Answer: Yes, agents should track the time. Even if they do not own the thread, they are spending time working on it, so it counts toward the total time the team spends answering a thread.

There is also a **Stop** button. When you click Stop, the Labor Timer resets to zero and a labor log is generated that appears in the Labor Center (discussed below).



Idle Time Out

The Labor Timer automatically pauses after 25 minutes of inactivity. Should the Labor Timer time out, please remember to restart the timer when you begin working on the thread again.

Skewed Labor Reporting

The 25-minute time-out has the potential to skew your labor reporting. It is therefore important that you remember to use the Pause button whenever you expect to be away from your work or when you begin working another thread (in a second tab) for more than just a few minutes. Here is why:

Thread 1	Thread 2	Thread 3	Total Labor
Open in tab 1	Open in tab 2	Open in tab 3	
Not working on this, not pausing timer	Not working on this, not pausing timer	Working for 5 minutes, then stopping timer for a break	= 5 minutes actual labor
25 minutes on timer	25 minutes on timer	5 minutes on timer	= 55 minutes of labor logged


The 25-minute time out will capture more labor time than you have actually worked if you do not PAUSE the threads you are not currently working on.



Important:

When your labor timer pauses after a 25-minute time out, you must remember to manually restart the labor timer when returning to the thread. It will NOT automatically restart.

The Labor Center

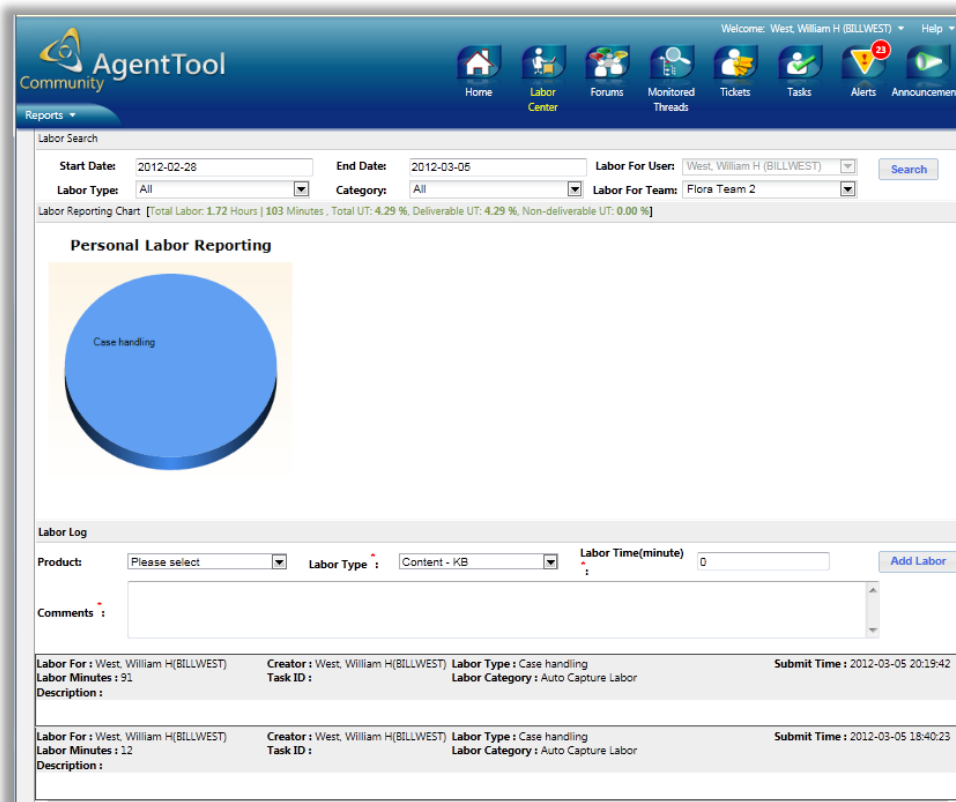
 *Helpful instructor information*

This section should take approximately 3 minutes to complete.

CAT adds the labor time from working on your threads, tickets, and tasks. The Labor Center lets you view your labor records. It also allows you to manually add or remove (add “negative”) time from your records to ensure that you are providing an accurate assessment of your workday. All changes (additions or subtractions) are recorded in the labor log.

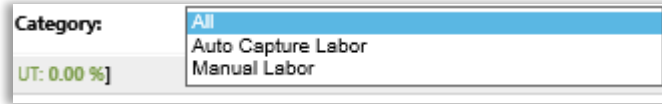
Overview

Click the Labor Center button on the CAT Toolbar to load the Labor Center. Here you see all of the labor recorded for your work in the forums. A set of filter and sort tools is available to you to help refine the labor records that appear in your labor logs.



Labor Category

There are two types of labor categories. As you can see in the Labor Center’s search tool, you can choose from **Auto Captured Labor** or **Manual Labor**.

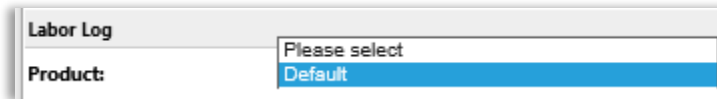


Auto-captured labor refers to the labor that is captured when you start and stop the labor timer when you are working a thread in CAT. This is what you should use as the default option.

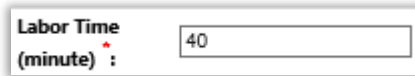
Manual Labor is recorded labor that you have added using the Labor Log tool in the Labor Center. This is only for making corrections to your time, such as when you leave a labor timer running for a ticket that you are not working on.

Add Labor

1. Open the Labor Center and scroll to the Labor Log section.
2. From the Labor Log select the following:
 - a. Select a product from the Product drop-down menu.
 - b. Select an appropriate labor type from the Labor Type drop-down menu.




3. In the Labor Time (minute) field, enter the amount of time that you want to add (in minutes). Input a negative number to subtract time.



4. Click Add Labor. Your labor has been recorded and now appears in your labor logs.

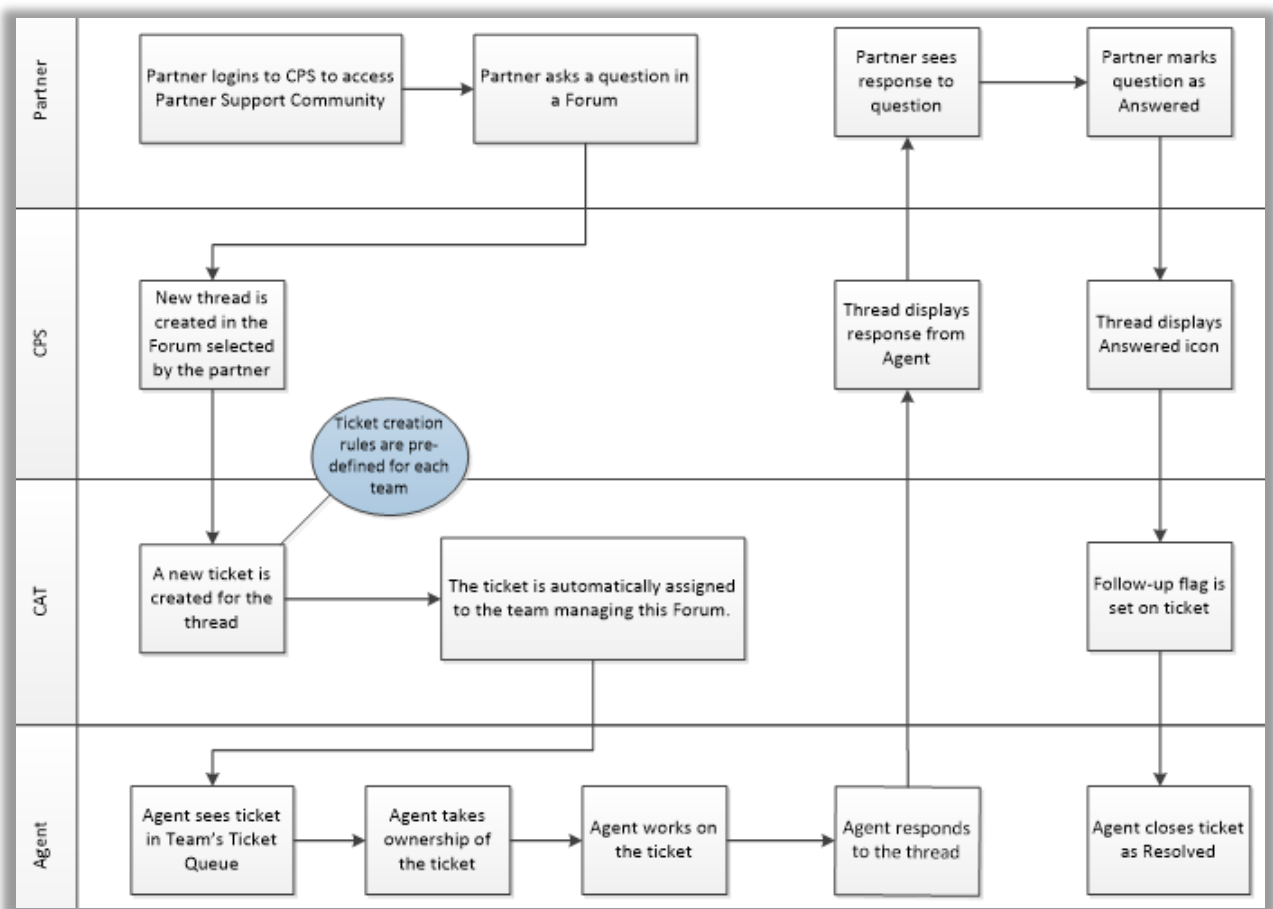
Review: Thread Management Process

 *Helpful instructor information*


Spend 20-25 minutes on this section. Answer any remaining questions that the agents have based on information you have presented.

Here again is an overview of the entire thread management process. Review these two diagrams and make sure you understand the end-to-end workflow by completing the two exercises.

Partner Asks a New Question



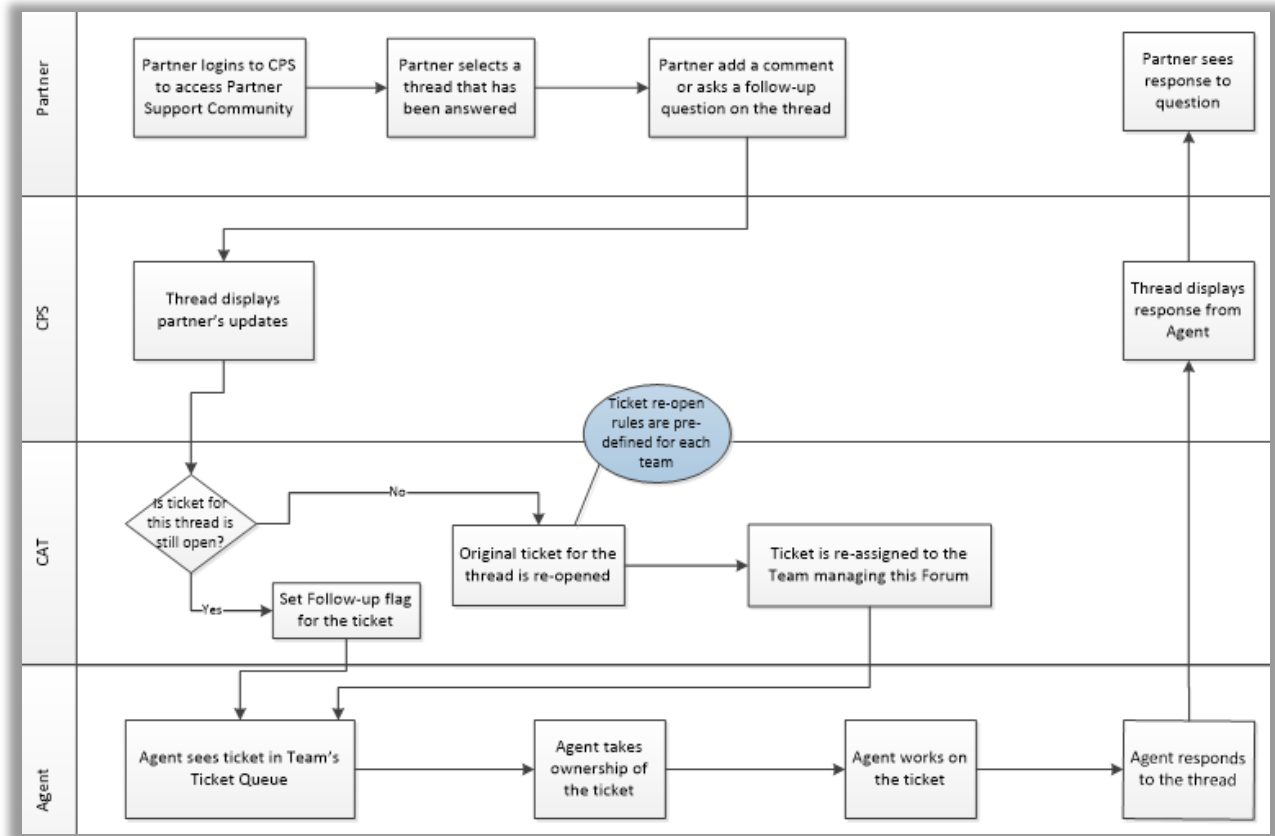
Exercise: New Thread

 *Helpful instructor information*


Spend 5-10 minutes on this exercise.

Write the name of the person or tool that performs the following tasks to the immediate left of the action. At the far left, number each step in the order they appear in the process diagram

Partner Updates Answered Thread



Exercise: Updating a Thread

 *Helpful instructor information*
Spend 5-10 minutes on this exercise.

Fill in the blanks below.

The Partner logs into _____ *CPS* to access the Partner Support Community. The Partner selects a _____ *thread* that has been answered. The Partner adds a _____ *comment* or asks a follow up question in the thread. _____ *CPS* displays these updates to the Partner, and one of the following two things happens in CAT:

- (1) The original ticket is _____ *re-opened* if it had been closed, and the ticket is _____ *re-assigned* to the appropriate team
- (2) A _____ *follow-up flag* is set for the ticket if it is still open

An RSC Agent sees the ticket in CAT's _____ *Team Tickets list (queue)*. The Agent takes ownership of the ticket, works on it, and then

_____ *responds to the thread*, which the Partner then views in _____ *CPS*.



Please return to the training portal to take the assessment and complete the course survey. Note that you may use this document when taking the test.