SmartOps

QMT-Query Management Tool

Version 3.0

"A highly effective end to end Work Management Tool"

USER GUIDE

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Click on the below topics to know more about what's new in QMT-3.0

Manual & SLA Reminder

Users can set manual reminder for certain emails to receive timely alerts in QMT. This will help users to complete their tasks without missing SLA.
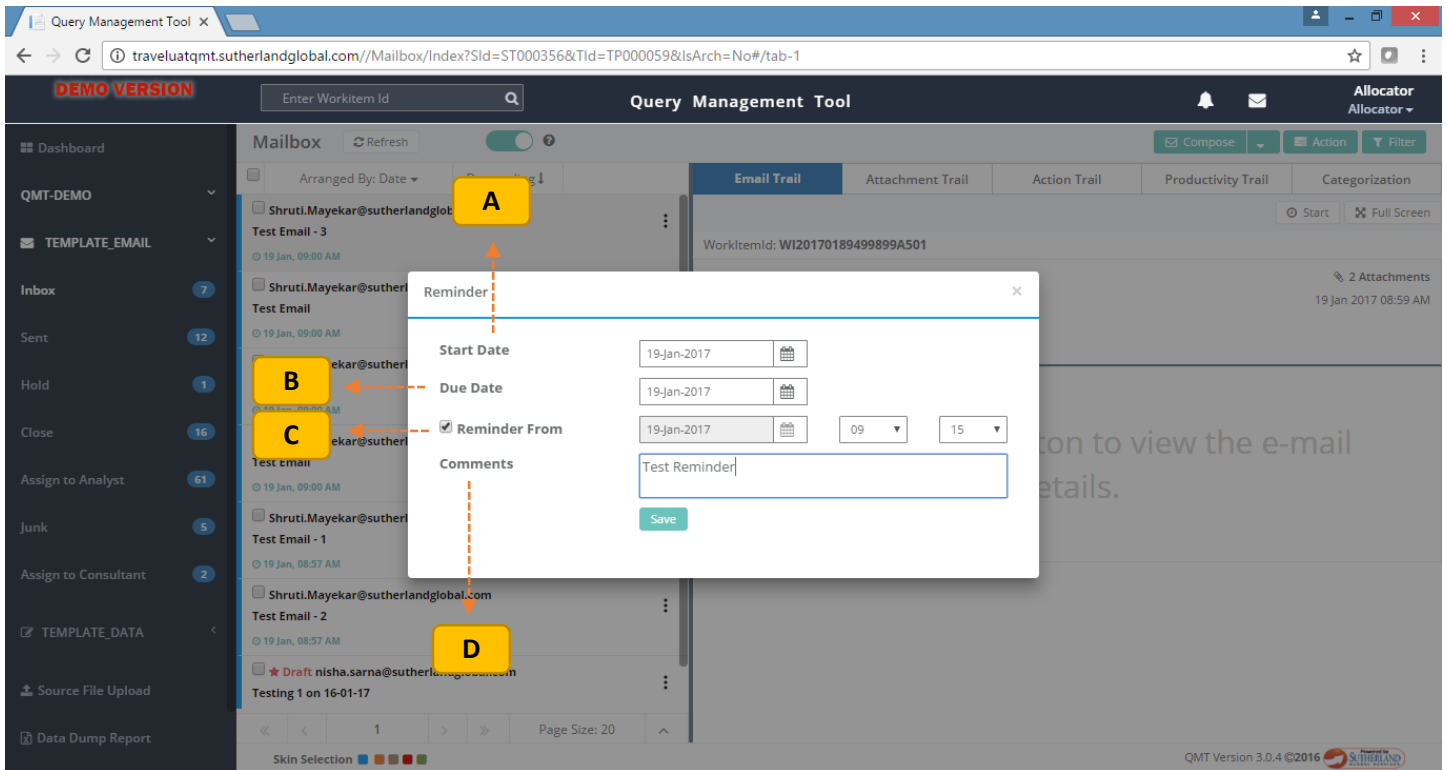
SLA reminder will help user to identify the emails which are nearing its SLA breach time. These reminders will be generated by system.

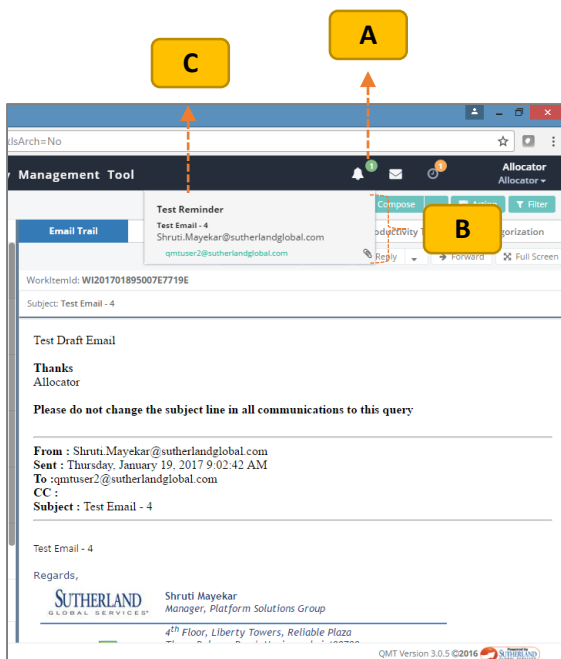**Steps to add a Reminder:**

A - Click the marked icon

B - Select the option "Add Reminder"

Steps to Set a Reminder:

A - Set the Start Date

B - Set the Due date

C - Set the Reminder date and time

D - Add comments

Reminder Notification:

A - The notification will be shown here

B – On clicking icon, the detailed list will be populated

C – Click on the details, to navigate to workitem

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Email Archival

Closed & Irrelevant emails can be archived so that only emails that are pending for action will be available under mailbox. This will help the user to view appropriate emails and also improve the performance.

Steps to Archive:

A – Select of the Archive tab to go to Archive Workitem page

B - Select the Template

C - Select From Date

D - Select To date

E - Click on Search Icon

F - The search result will be displayed here

**G** - Select the Status to be archived

H - Click on Archive button

Steps to UnArchive:

A – Click on the Archived Records tab to view the archived data.

B – Select the emails to be unarchived.
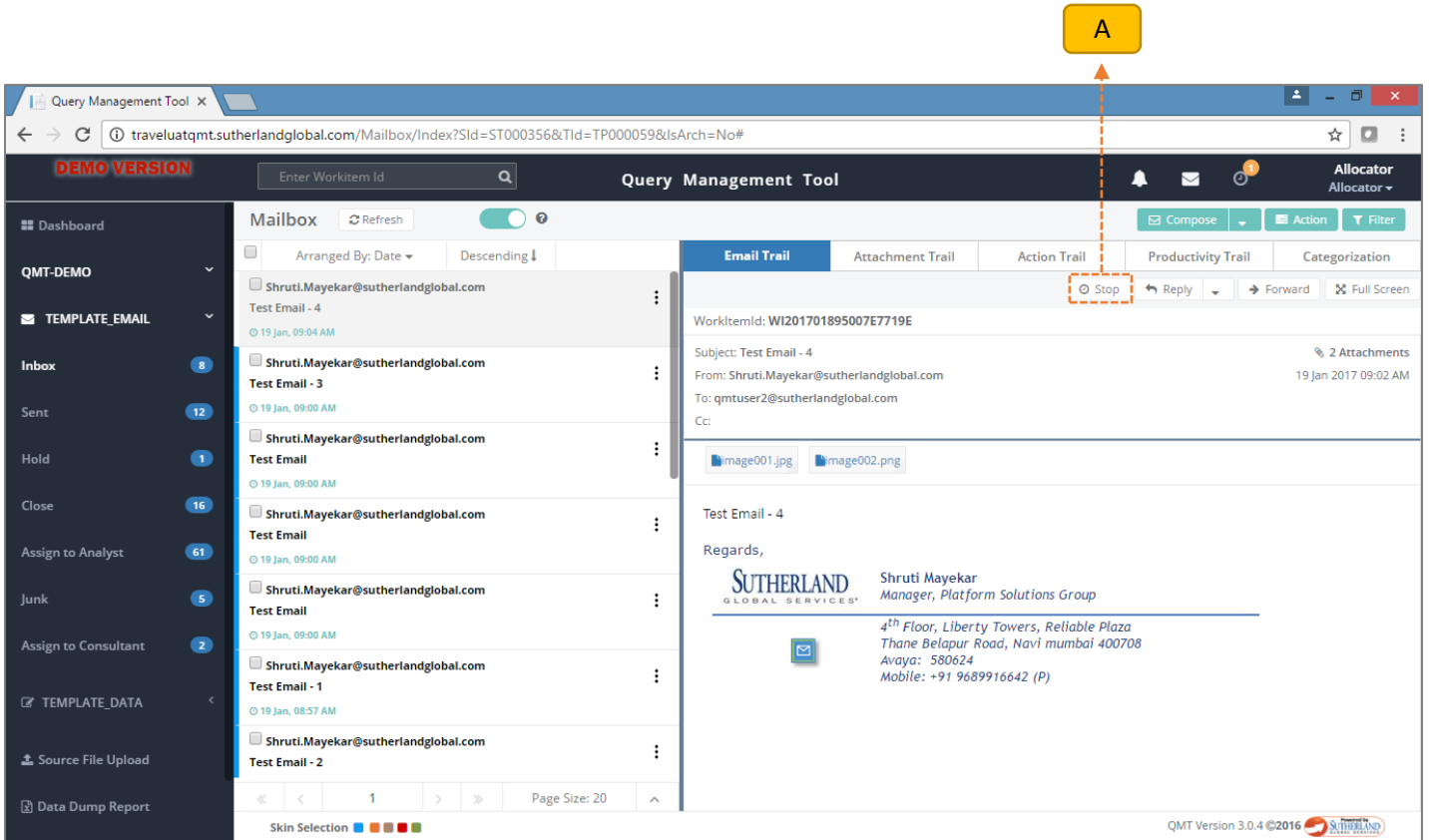
C – Click to UnArchive button.

Productivity Tracking

Users will have an option to start & stop while working on an email. This will help in identifying the actual time spent on a request and also gather average time taken by a user to work on email requests.
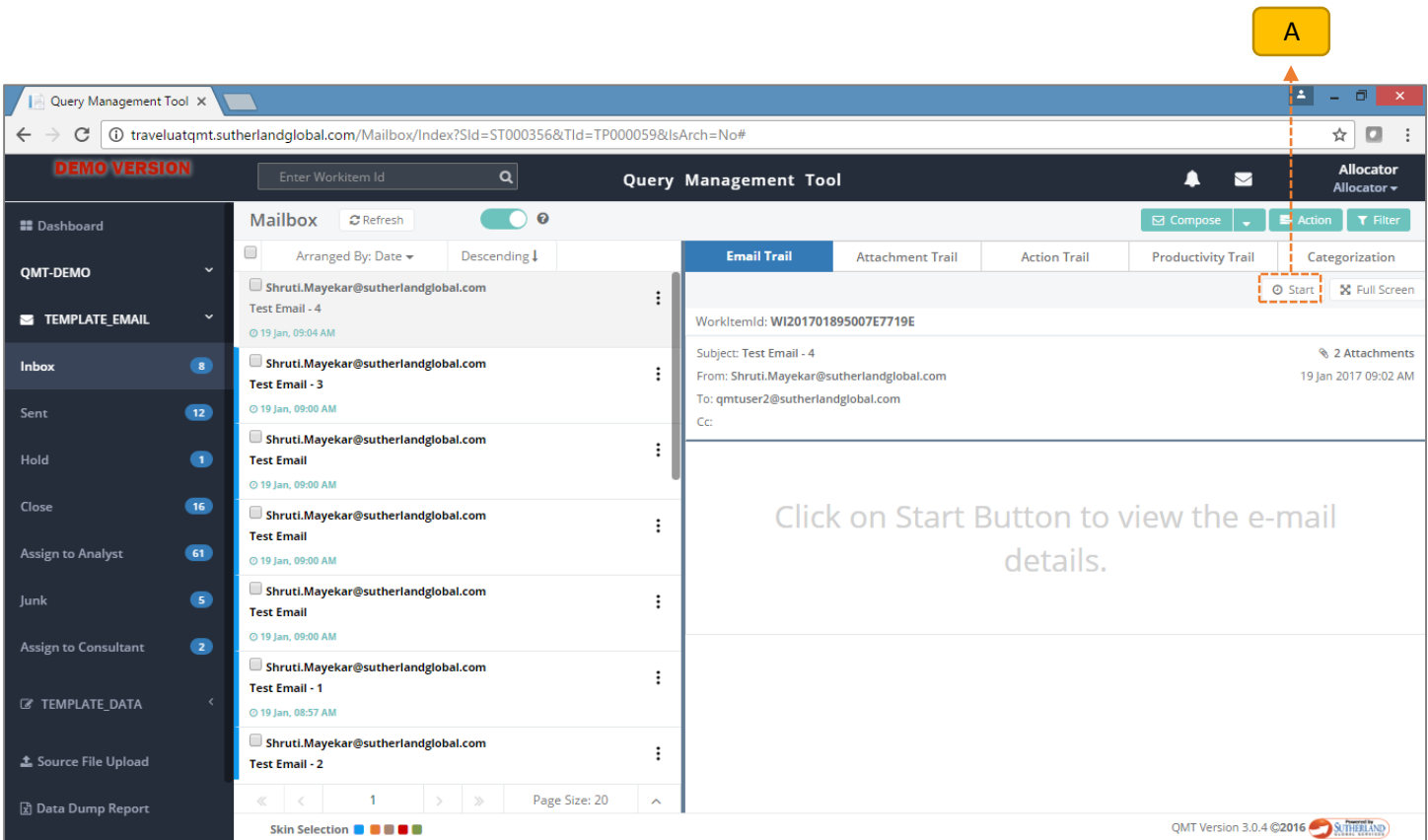
Steps to Start a Productivity Tracking:

A – Click on Start button.

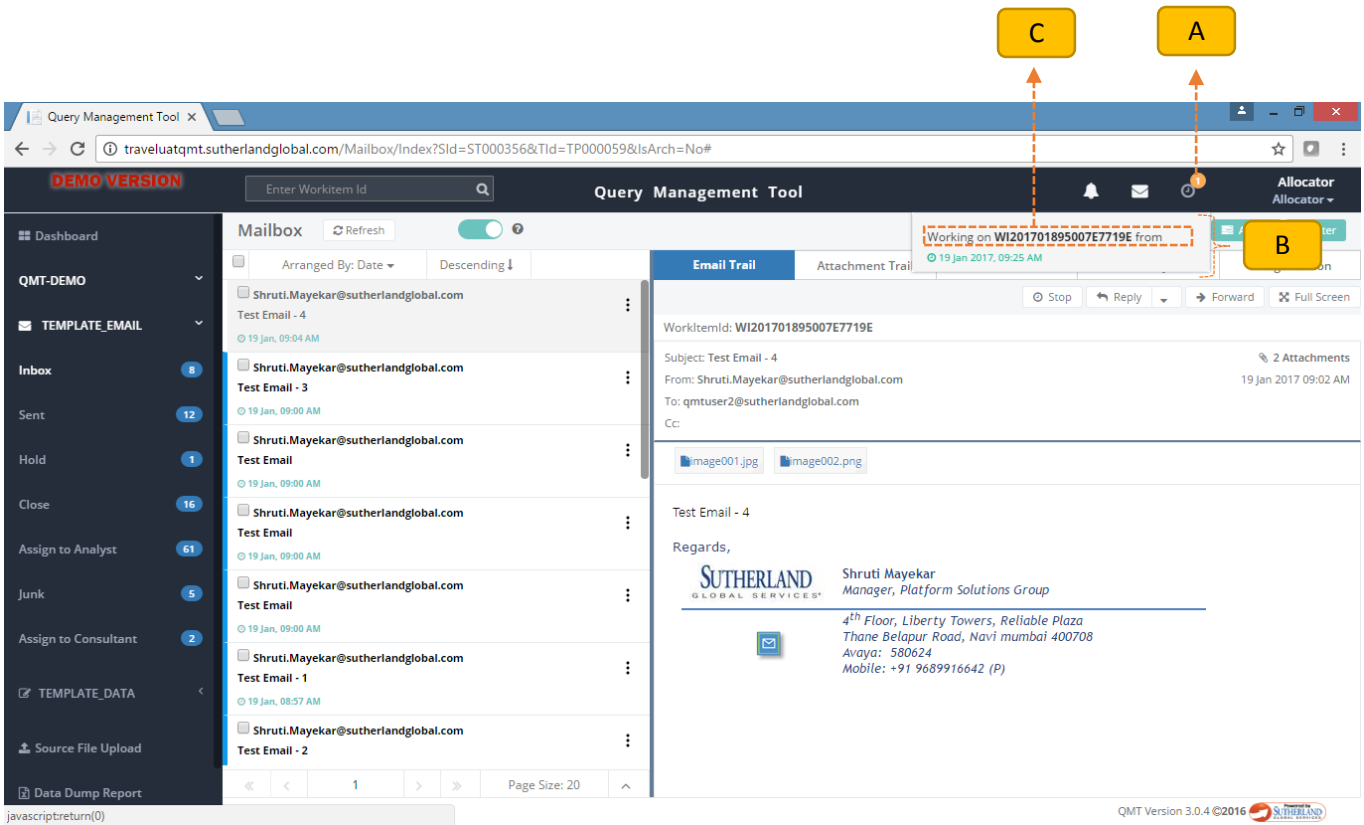**Steps to Stop a Productivity Tracking:**

A – Click on Stop button.

Steps to View Productivity Trail:

A – Click on Productivity tab for trail details

**B** – Detailed productivity trail will be shown here

Productivity Notification:

A – The notification of emails whose productivity is in stared mode will be shown here

B – On clicking icon, the detailed list will be populated

C – Click on the details, to navigate to workitem

Work Offline

These feature will enable user to take actions on email without refreshing the mailbox. The action taken by user in offline mode will be synchronize once user switches the view to Online again.

User can also click on Refresh button to get the real time workitem count & workitem list while continue to work in offline mode.
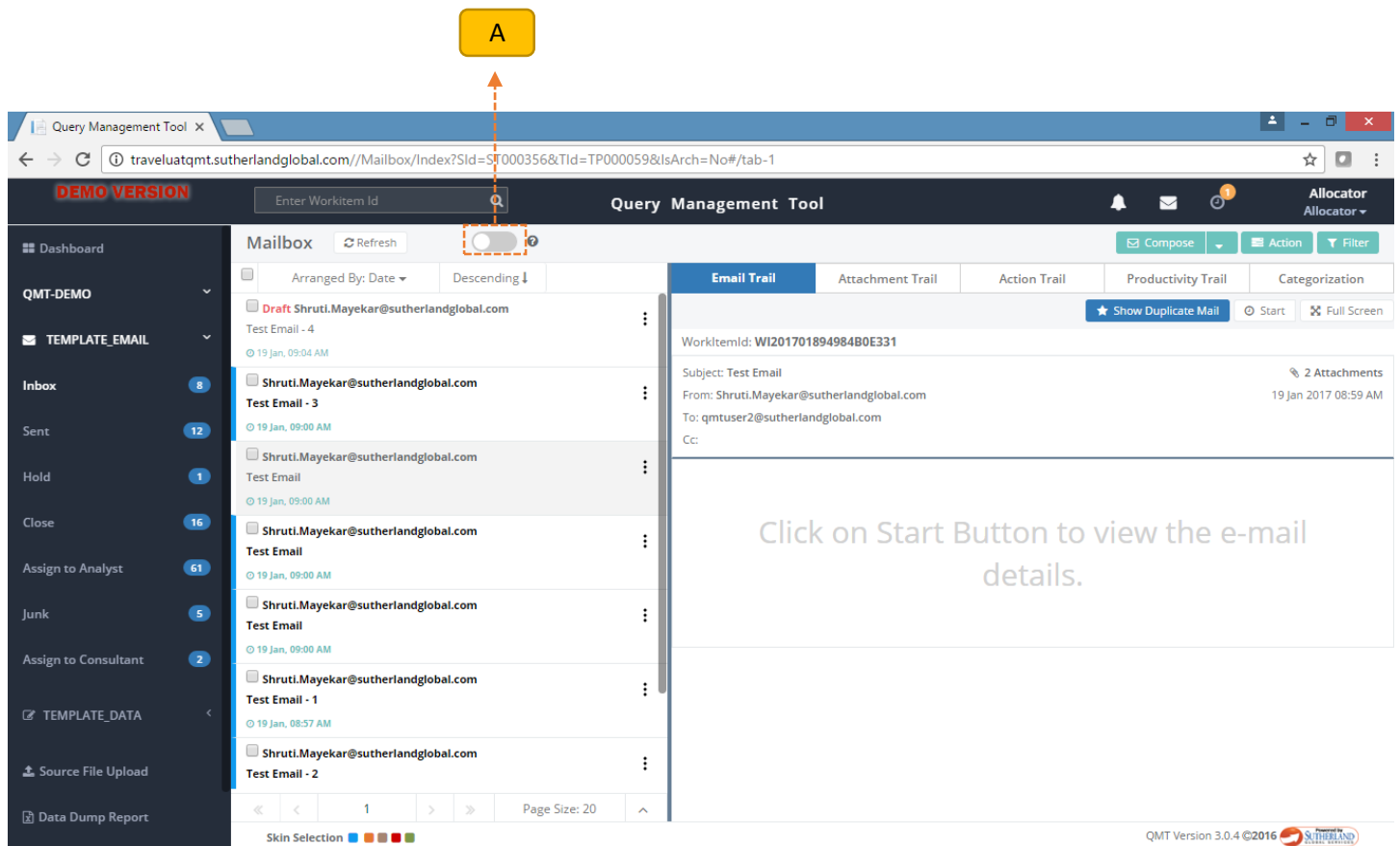
Steps to Work in Offline Mode:

A – Click on the switch to toggle between online & offline mode.

Email Notification on UI

All new emails can be notified on screen so that users can work on such cases.
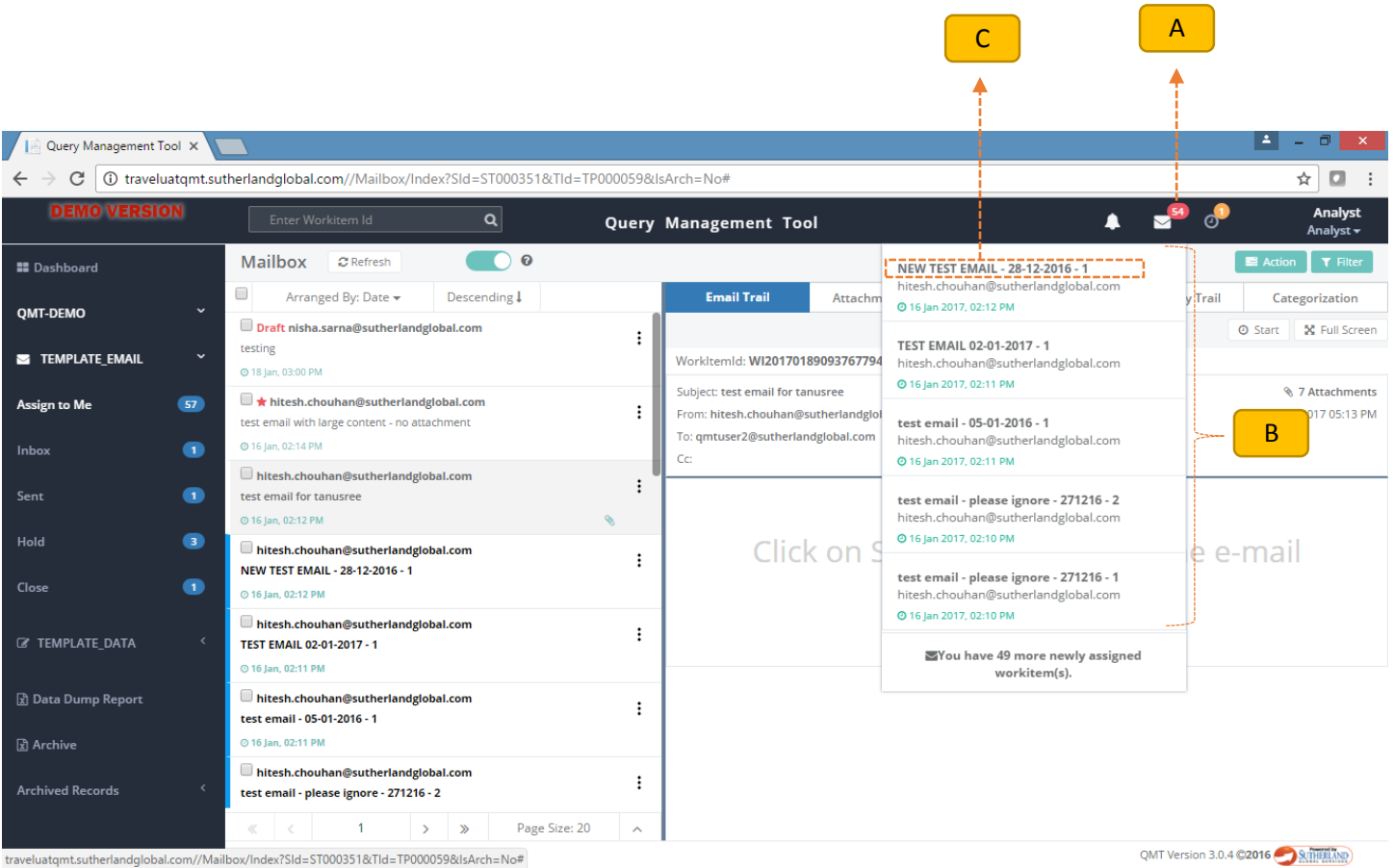
New Email Notifications:

A – New email notification with an incremental / decremented counter is displayed here

B – On clicking icon, the detailed list will be populated

C – Click on the details, to navigate to workitem.

Save As Draft

An email for which an investigation / work is in progress can be captured as saved as draft so that the details gathered / completed will be stored in QMT and the user can continue to add more details before finally replying to the email.
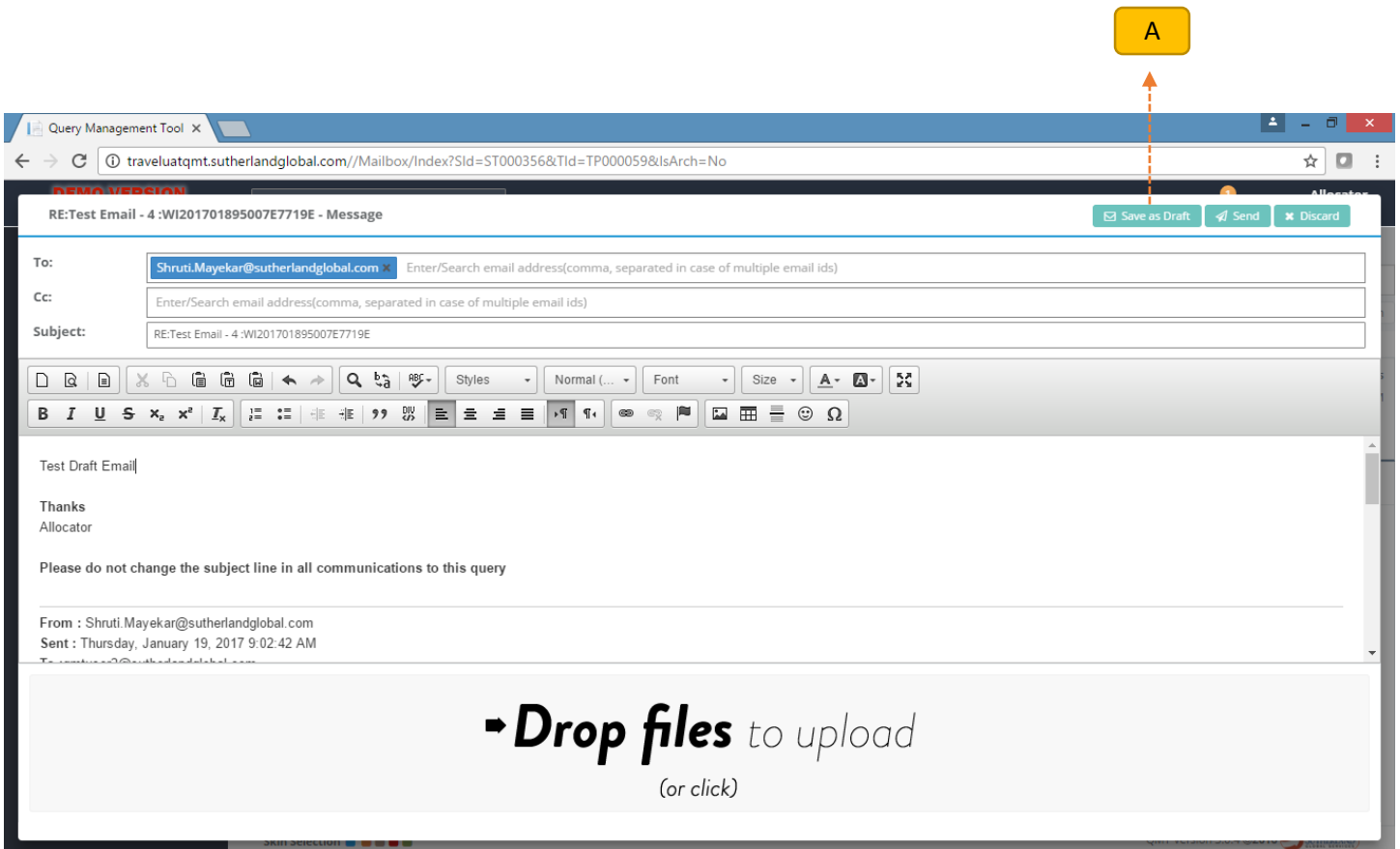
Steps to create Draft:

A – Click on this button to save as draft

Draft Notification:

A – Notification can be viewed here

Steps to view content of draft email:

A – Click here to view the email list

B – Click on the DRAFT tab to view the email content
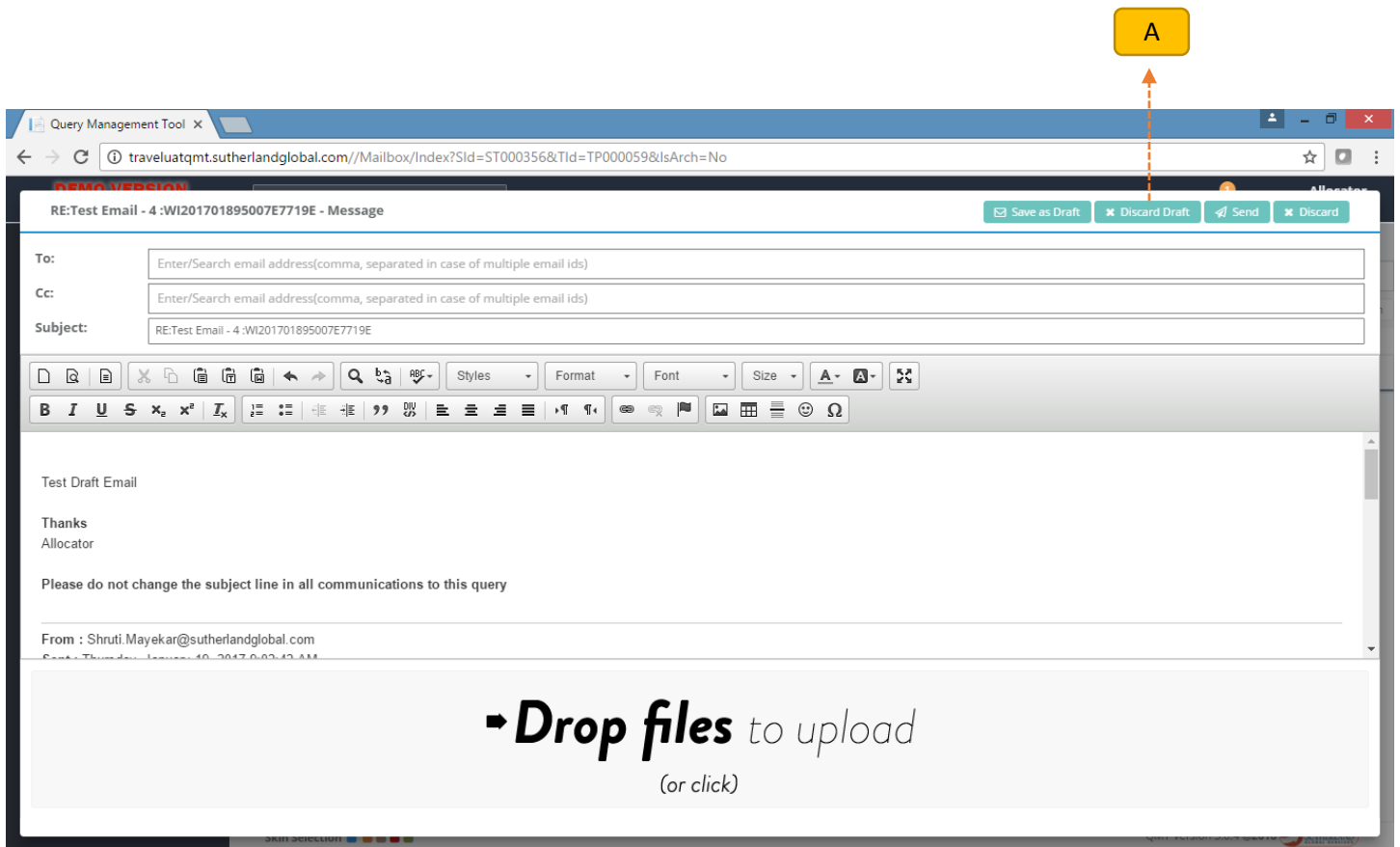
Steps to discard Draft:

A – Click on this button to discard the draft

Compose / Reply using pre-defined templates

Templates can be created for standard replies so that the user doesn't need to type the same reply every time instead can select the right template while replying. This will reduce the time in replying to an email and also increase the productivity of the user.

Compose using Pre-defined templates:

A – Click on the arrow icon to view the pre-defined template list

B – List of the pre-defined templates

C – Select the template name to send email

Reply Using Pre-defined templates:

A – Click on the arrow icon to view the pre-defined template list

B – List of the pre-defined templates

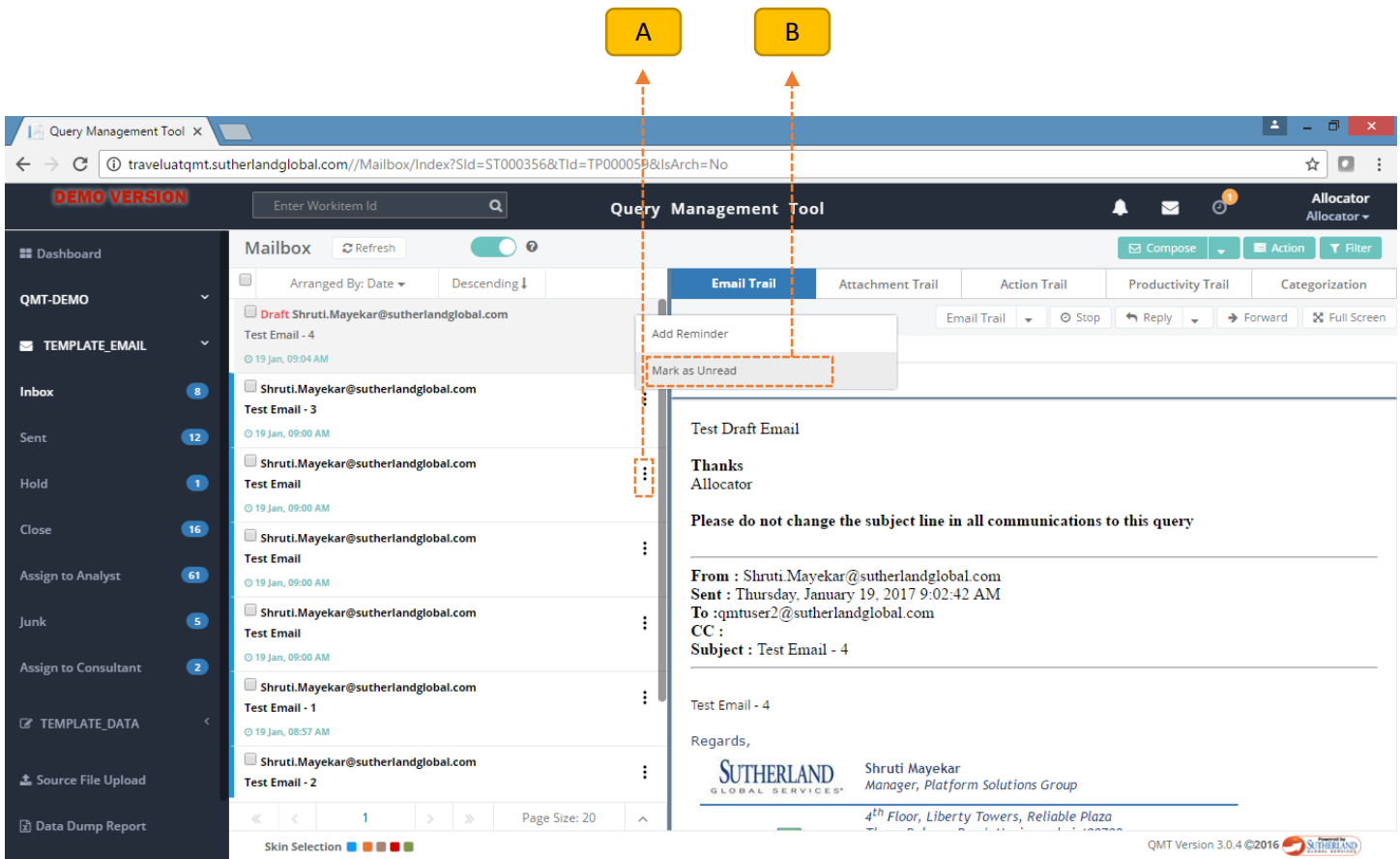**C** – Select the template name to send email

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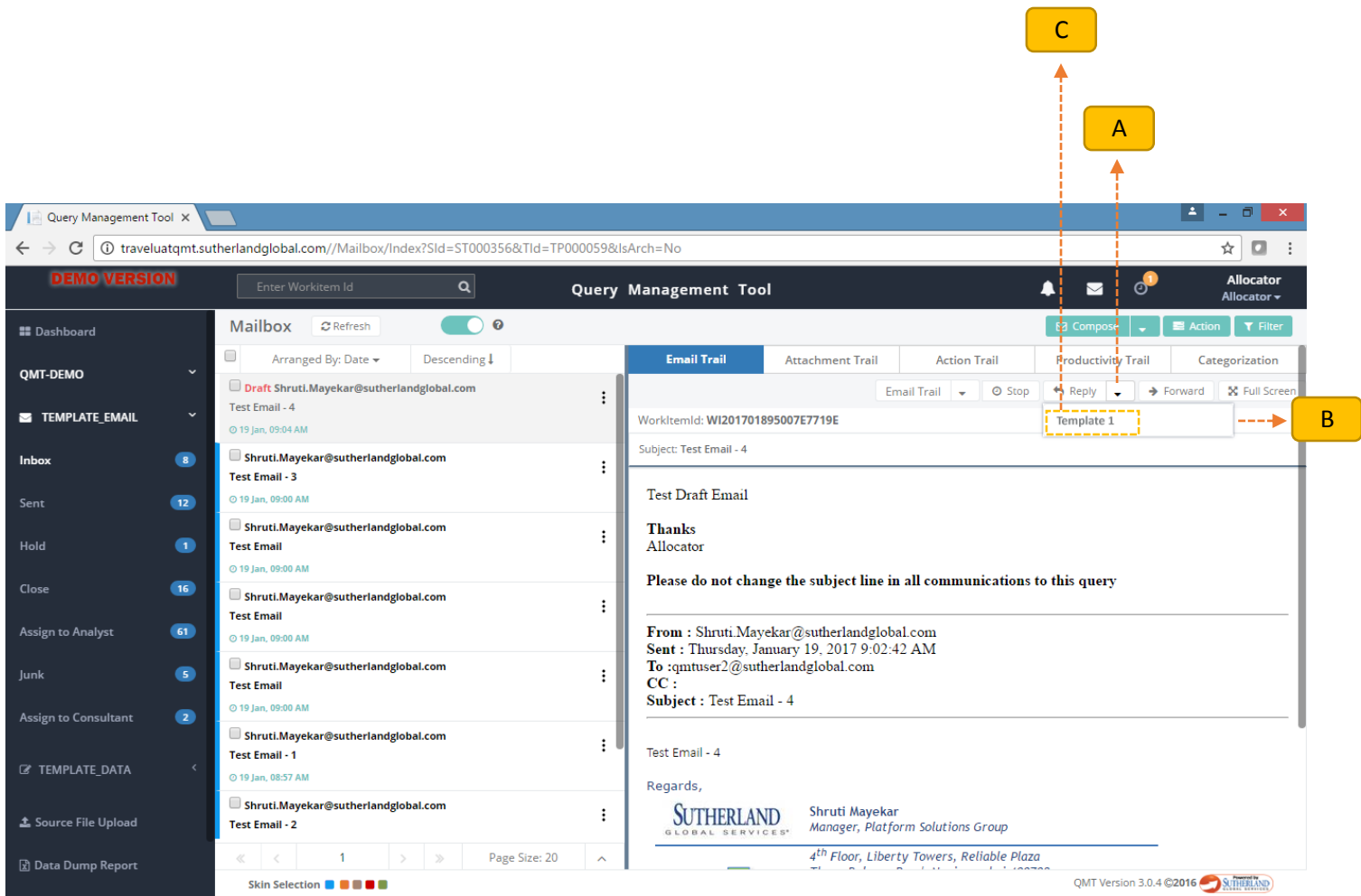
Unread E-mail Notification

Newly arrived emails will be highlighted in the unread notification area so that users are aware of new emails and can take appropriate action.

Mail Unread Notification:

A – Blue highlighted strip on the left of the Workitem indicates as Unread.

Steps to Mark email as Unread:

A – Click on the icon.

B – Click on the Mark as Unread

Duplicate Email Notification

Email with similar subject line but with different workitem id will be flagged as duplicate emails. User will get a notification against each email along with the details of similar workitem id like its current status, pending with role & user etc.

A
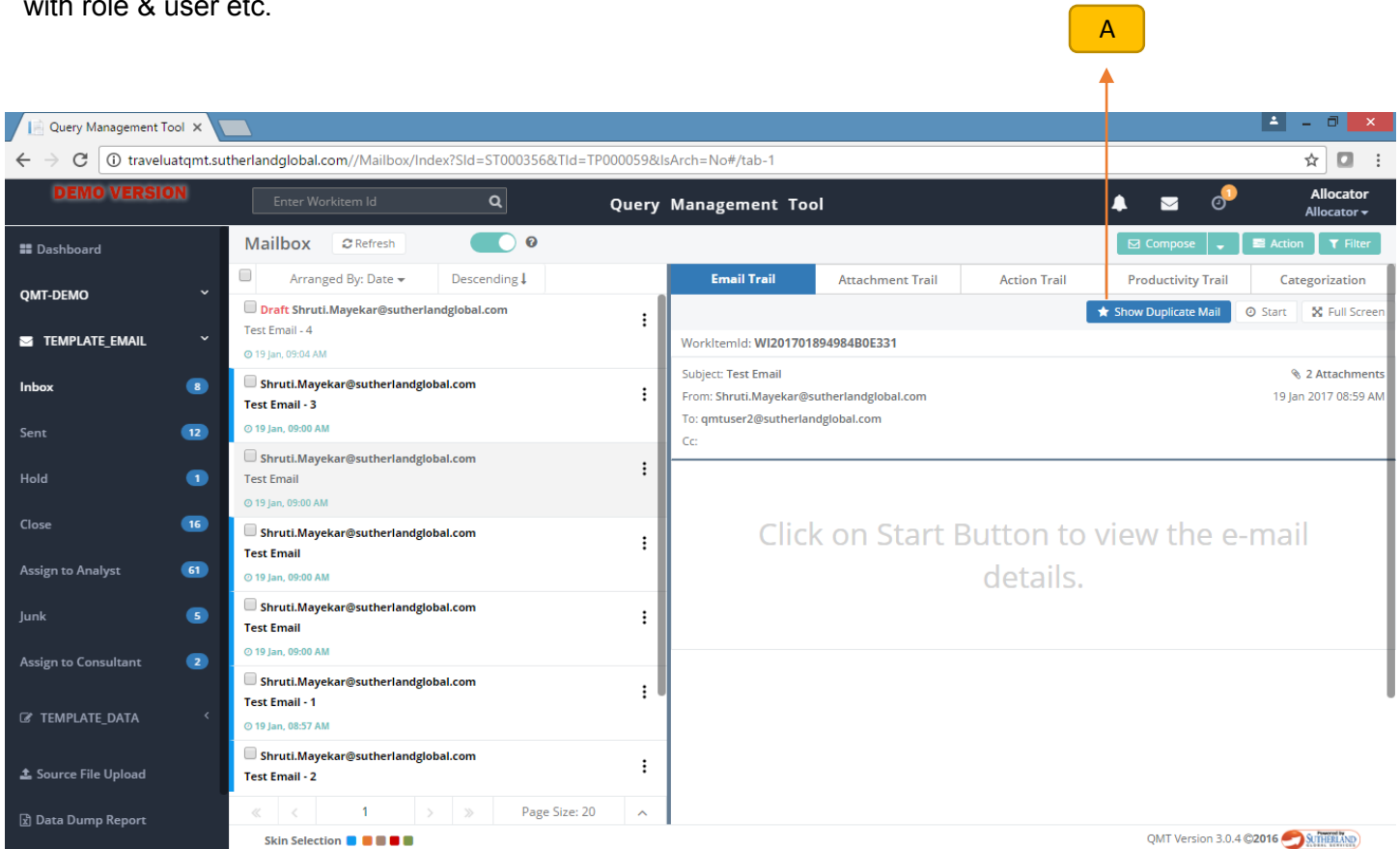
Duplicate Email Notification:

A – Click on the button to view duplicate emails.

Duplicate Email Details:

A – Email details will be show here

B – Click here to close the pop-up

Sorting of Data in Re-Assignment

User can sort the data while re-assigning. By default system will sort the data on SLA

Steps to Sort:

A – Click on the icon to sort the data in ascending / descending order.

Data Dump Report

The data dump report can be generated as per workitem creation date / email trail date or Last action date.

Steps to generate Report:

A – Select Template

B – Select From date

C – Select To Date

D – Select Archive (Yes – To include Archive Data, No – To exclude Archive Data, All – Both)

E – Select SelectionType (Workitem Creation – Derive the report as per the date when workitem is created in QMT, Email Trail Date – Derive the report as per the email communication done on a workitem, Last Action Date – Derive the report as per the last action taken by user)

F – Click on Search button

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Ageing Report

The ageing report can be generated by calculating aging in days / hours / minutes. The report can also be generated for multiple months.

Steps to generate Report:

A – Select From Month

B – Select From Year

C – Select To Month

D – Select To Year

E – Select Template

F – Select Expand / Collapse

G – Select Range (Days – Aging calculated in days, Hours – Aging calculated in hours, Minutes – Aging calculated in minutes)

H – Click on View Report.

I – Report data will be displayed here.

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Productivity Trail Report

The aging report can be generated by calculating aging in days / hours / minutes. The report can also be generated for multiple months.

Steps to generate Report:

A - Select Template ID

B – Select Role

C – Select User

D - Select From Month

E – Select From Year

F – Select To Month

G – Select To Year

H – Click on View Report

I – Report data will be displayed here

Filter for Numeric Values in Categorization using Slider

Numeric categorization fields will be available as slider for filtering emails. This will help user to get the required output within a range.

Steps to filter data for numeric values:

A – Click on the slider icon to select the range

B – Click on search.

Tab, Section & Group for Data Templates

Data to be displayed in multiple tabs. Each tab is divided into sections and each section is divided in groups. Each tab / section / group will be loaded individually which will result in user friendly data display and improved performance.

Edit Workitem

The selected columns of workitem can be edited by user later. System will also maintain the edit trail for future reference.
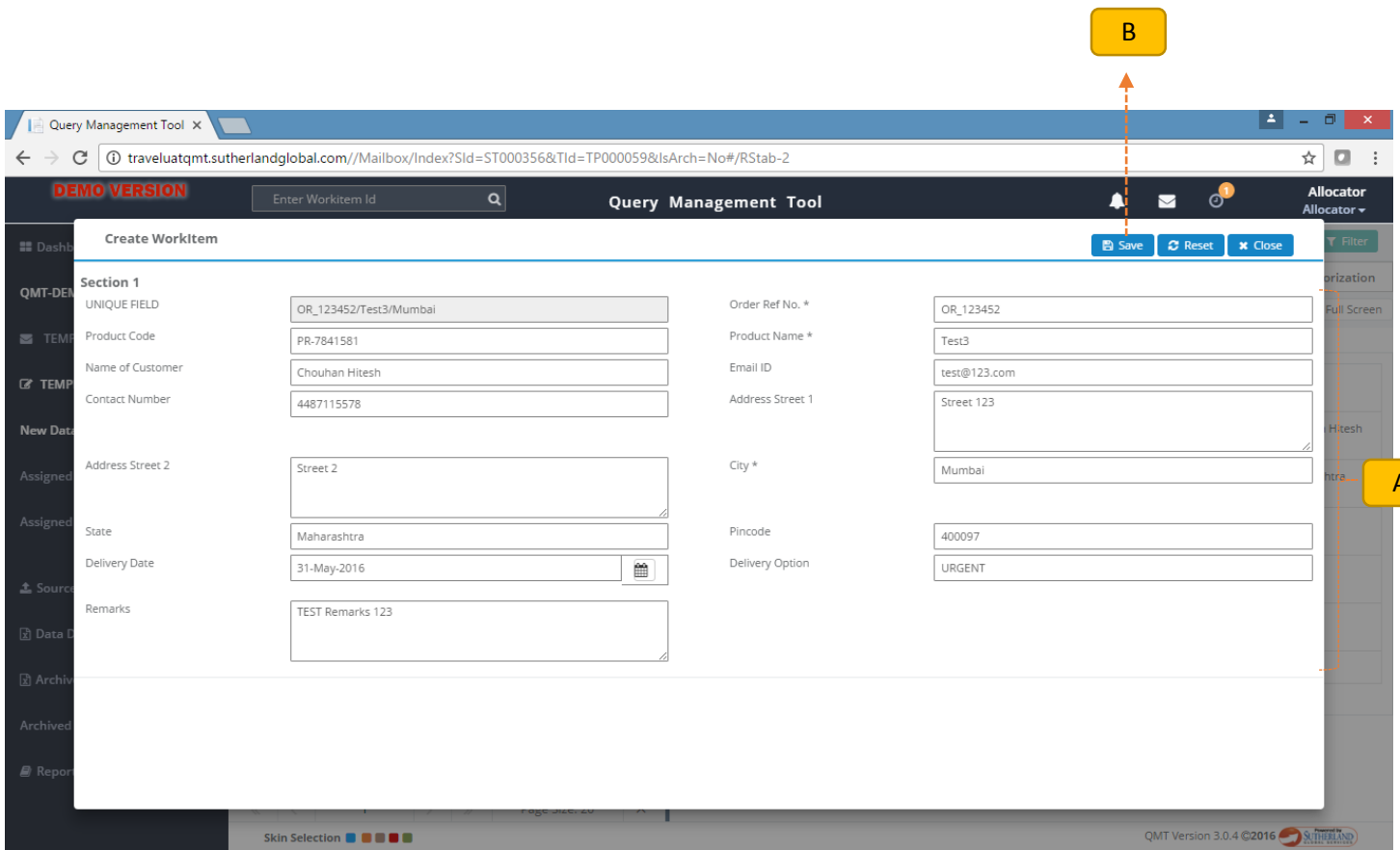

Steps to edit Workitem:

A – Click on the button to edit the workitem details.

Edit Workitem details:

A – Update the details

B – Click on save button

View Edited Workitem History:

A – Click on the button to view the history.

View Edit Workitem trail:

A – Details of edited columns information will be shown here.

B – Click on the close button to close the view

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On Demand Mailbox Loading

Users having multiple mailbox access, all the status for every mailbox were loaded together. On Demand loading only loads a mailbox that is currently being viewed by the user.

Rules to Auto Action Workitem (Phase1)

Rules can be created for every email that reaches QMT so that few manual interventions can be eliminated. Hence, users will working only on relevant emails resulting in improved productivity & TAT.

Status based auto acknowledgment email

Auto acknowledgment can be sent to the sender on pre-configured statuses within the QMT. These email will give a fare idea to sender about the progress on the workitem

Transaction Level SLA

SLA can also be set at transaction level along with the existing status level SLA. New reports on Transaction level SLA and existing reports to support both, Transaction & Status level SLA.

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Thank You

For any further queries/issues mail to: PSG_QMT_HELPDESK@sutherlandglobal.com