USER HANDBOOK

1. Introduction

This document describes the basic functions for managing and displaying service requests (tickets) offered by the Regesta service portal.

2. Access to portal

The portal guarantees the possibility to create, modify and display the desired service tickets, view the progress of the works and, when necessary, declare their closure.
The portal can be reached remotely at the following link: **https://assistenza.regestaitalia.it/**.
To access the portal for the first time, use the credentials provided by Regesta.
In this first access screen you can choose the language (English or Italian) by clicking on the flag at the top right.

2.1 User's roles

The portal has been developed to support different user roles with different permissions to ensure flexibility and control over tickets before they are finally forwarded to Regesta. These roles will be assigned by the Regesta team to the various portal users on the customer's instructions.

Associato AIB
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Quality management system
ISO 9001
· Customer focus
· Customer satisfaction
· Continuous improvement
· System/process effectiveness
ID 15 100 1810374

Depending on the type of role assigned, each user can create:
1. tickets immediately opened and sent to Regesta;
2. tickets subject to internal approval (single or double) before forwarding to Regesta.

The management of the field "Order" (introduced in the 2.0 version of the tool) allows the mapping of different Users and Administrators for the different plants.

1. **Administrator**: user who can create, edit and close tickets. Also approves and manages tickets opened by users of type "simple approval" or "double approval". There can be different types of Administrators:
   a. **Administrator with specified area and job order**:
      i. E.g. Administrator of the FI area of the "Plant1 job";
      ii. Assigned to the functional manager of an office of a specific Plant;
      iii. He/she can see and approve (if required) all the tickets for users of his/her Area and Plant.
   b. **Administrator with specified area and job order not specified:**
      i. E.g. Administrator of the FI area;
      ii. Assigned to the functional manager of an office for all the plants in the group;
      iii. He/she can see and approve (if required) all the tickets of users of its Area for all the Plants of the group.
   c. **Administrator with specified area and job order not specified:**
      i. E.g. Administrator of the "Plant1 job";
      ii. Assigned to the IT Manager of a specific Plant;
      iii. He/she can see and approve (if required) all the tickets for users of its Plant, in any Area they belong to.
   d. **Administrator with not specified area and job order**:
      i. He/she represents the IT Manager of the group;
      ii. He/she can see and approve (if required) all tickets of users in the group, in any Area they belong to.

2. **User open status**: user who can create tickets that are directly forwarded to Regesta upon saving, without the need for internal approval cycles. Can't test tickets and can only display tickets for its own Area and Plant.
   a. **User open status with specified area and job order:**
      i. E.g. User FI area of job "Job Plant1";
      ii. Assigned to the user of an office of a given Plant;
      iii. He/she can only insert and view tickets for its own Area and Plant.
   b. **User open status with specified area and job not specified:**
      i. E.g. User FI area;
      ii. Assigned to the user of a centralized office, which serves all the plants in the group;
      iii. He/she can enter and view only tickets for its own Area, but for all the Plants in the group, specifying then on the single ticket which job (and therefore which Plant) the ticket refers to.
   c. **User open status with unspecified area and specified job:**
      i. E.g. User of the "Plant1 job";
      ii. He/she represents a User of a specific plant that deals with more than one area;

   iii. He/she can enter and view only tickets for his Plant, but for all areas, specifying then on the single ticket which Area the ticket refers to.

  d. **User open status with area and job not specified:**

   i. In this case we recommend mapping the user with an "Administrator" type user.

3. **Simple approval user:** can create tickets that are not directly forwarded to Regesta when saved, but require the approval of an Administrator user, who oversees, at least, the Area to which the ticket refers.

   If there are more than one Administrator user (e.g. one who only administers one area, the other who administers all the areas of the plant), everyone is informed of the open ticket and can approve it; when the first Administrator approves the ticket, it is forwarded to Regesta.

   There can be different types of User simple approval: for the categorization please refer to what is described for the User Open State.

4. **Double approval user:** can create tickets that are not directly forwarded to Regesta when saved, but require the approval of two Administrator users: the Administrator of the Area to which the ticket refers and an IT Administrator (of the plant or of the group). Only after the approval of both Administrators the ticket is forwarded to Regesta.

   There can be different types of User double approval: for the categorization please refer to what is described for the User Open State.

3. Login screen

The Login screen gives you the ability to create new tickets, view the status of open tickets and review the history of closed tickets.

To view or modify the contents of any ticket, click on the icon " ![icon] " to the left of each line.
When you log in for the first time, you will need to change your password into one of your choice in the "change password" section at the top right of the page.

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Name Surname | Change Password | Logoff

	Tickets	Opened	▼	Varianti	No Sospesi *	▼	💾 🔄										X

➕	ID	Inserted by	Insert date	Order	Title	Area	Status	Urgency	Required date	Bug	Quotation	Sched. date	Final days	
◀							Sospes ✕ ▼							
📝	12509		05/05/17 09:45			MM	Normal	Normal	31/08/2017	☐				📎
📝	13393		01/08/17 18:37											📎
📝	14047		11/10/17 18:01											📎
📝	14214		25/10/17 16:43											📎
📝	14287		02/11/17 16:21											📎
📝	14380		10/11/17 12:28											📎
📝	14441		17/11/17 15:20											📎
📝	14453		20/11/17 17:46											📎
📝	14485		23/11/17 10:16											📎
📝	14721		14/12/17 14:31											📎
📝	14794		19/12/17 14:11											📎
📝	15573		22/02/18 18:23											📎
📝	15732		07/03/18 14:07			SD	Open		23/04/2018	☐				📎
📝	15817		12/03/18 15:47			SD	Open		02/04/2018	☐	2,000			📎
📝	15920		20/03/18 15:34			CO	Develop		28/03/2018	☐	1,000			📎
📝	15989		27/03/18 17:32			PP	Test		25/05/2018	☐	2,500			📎
📝	16136		11/04/18 11:32			ALINK	Waiting specs	Normal	20/04/2018	☐				📎
📝	16139		11/04/18 11:53			WEB	Estimated	Normal	13/07/2018	☐	10,000			📎
📝	16156		12/04/18 15:26			PP	Test		31/05/2018	☐	5,000			📎
📝	16551		17/05/18 17:32			ALINK	Open	Normal	31/05/2018	☐				📎

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04/11/2017

Old Password [ ]

New Password [ ]

New Password [ ]

[Ok]

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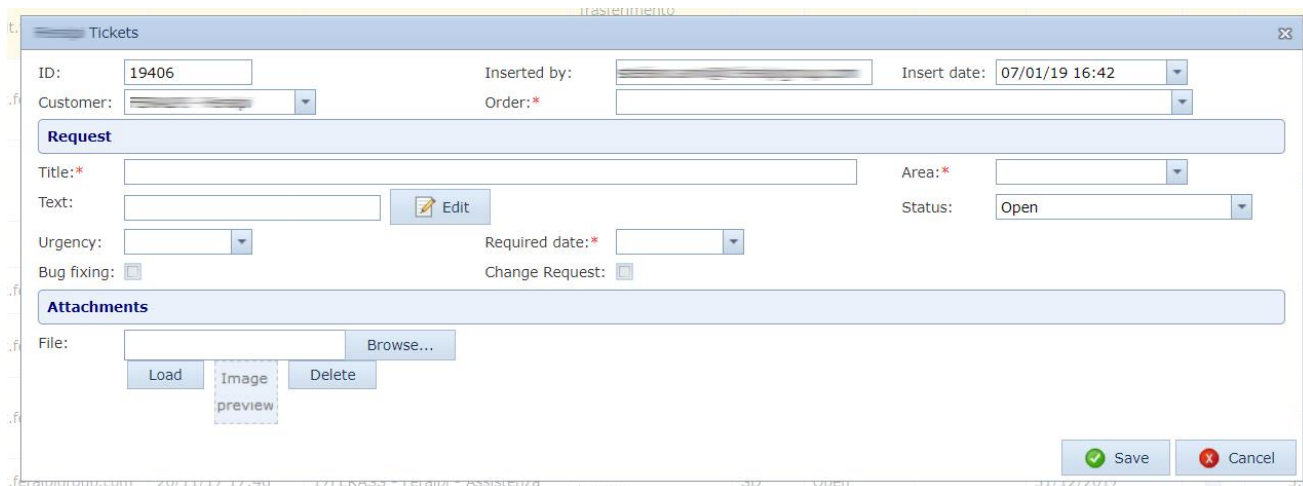☑ ▼ [Stato] Does not equal 'Sospeso'   Clear

4. Creation of a ticket

To create a ticket you must select the button with the green icon "➕" which is located at the top left of the Home screen.

The first section contains the personal information:
- ID: ticket identification number;
- Inserted by: the user who submitted the request;
- Date of entry: automatically filled in by the system;
- Customer: company of which the user is a member;
- Job order: project of which the submitted request is part (mandatory).

In the "Request" section we find:
- Title: name identifying the ticket (mandatory);
- Area: Regesta department that has to take charge of the ticket (mandatory);
- Text: section where you can exchange messages with the person in charge of the registry ticket;
- Status: progress of the work, is explained in detail in the next paragraph;
- Urgency: degree of urgency;
- Desired date: to specify the deadline by which the solution is needed (mandatory);
- Bug fixing: serves to identify requests relating to bugs identified in relation to developments or customizations carried out by regesta. It can be removed if this label is not correct by Regesta administrators, users and consultants. Tickets used to resolve bugs are not subject to billing;
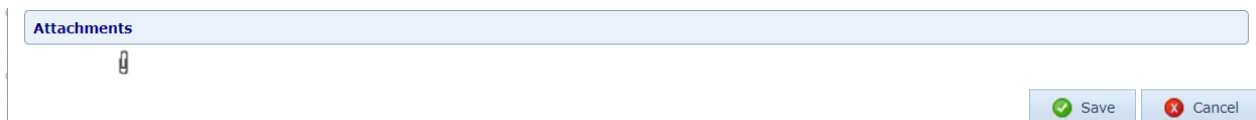- Change request: request for modification of what was previously established.

The user, the customer, the job and the area, if configured in the user's master data, are automatically compiled by the system.

In the last section "attachments" there is the possibility to insert a file. After saving, other attachments can be added in two ways:
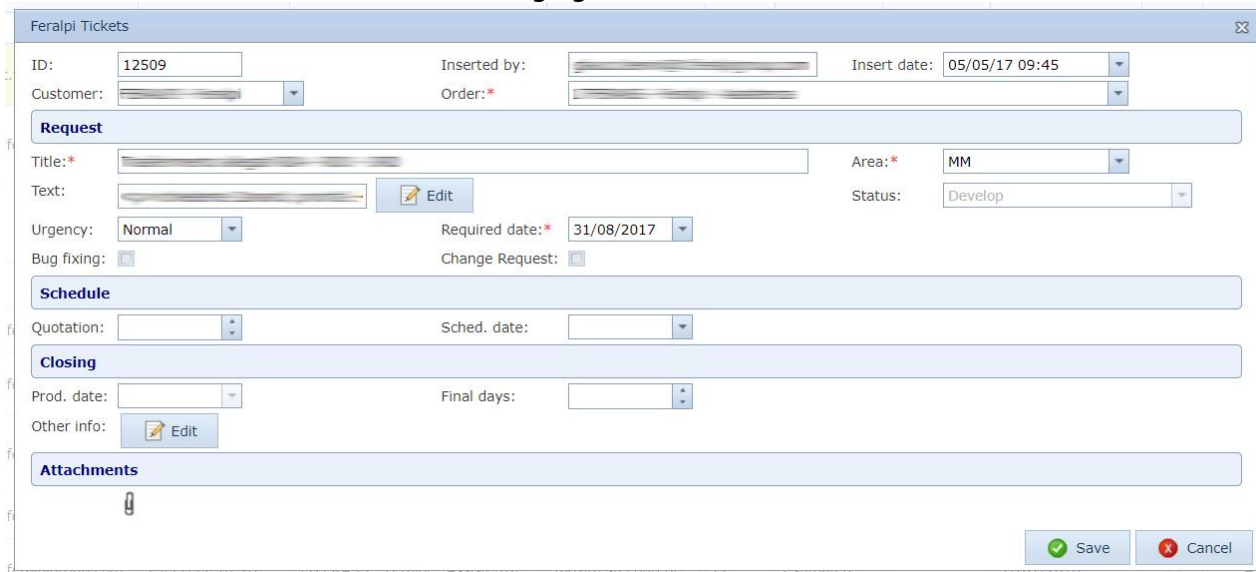- By clicking on the last icon "📎" in each line of the ticket description on the main screen;

- By clicking on the icon "📎" which appears in the ticket detail screen.

Additional fields are available when changing the ticket:

The first additional section is "Allocation" and is entirely and exclusively managed by Regesta's consultants:
- Estimate: Estimated working days for ticket processing;
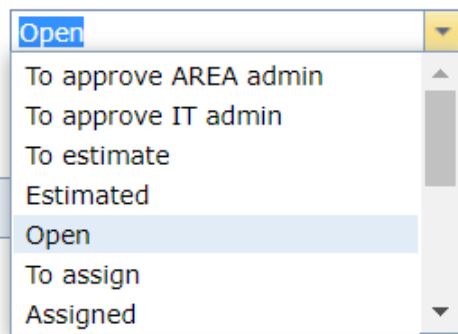- Planning date: date on which we planned to issue the ticket to the customer.

The other additional section is "Closing":
- Production date: date on which the development is brought into production the field must be fed in case of choice of the state "To put into production";
- Days worked: field managed by Regesta's consultants with the calculation of the days worked;
- Other information: further information to be specified.

4.1   Ticket status

Each ticket assumes different states according to the stadium it is in within its life cycle, from insertion to closure of the same.
The states are modified by the various actors involved in the life cycle of the ticket, whether they are authorized users or Regesta consultants, modifying the appropriate field as indicated below.

a) To approve Area admin:
- Mandatory only for users with dual approval level;
- Serves to request the approval of a function manager (e.g. Administrative Director) for a ticket entered by a user (e.g. administrative office employee).

b) To approve IT admin:
- Mandatory only for users with single or double level of approval;
- Serves to request the approval of the IT manager after that of the function manager (e.g. Administrative Director) for a ticket entered by a user (e.g. administrative office employee).

c) To estimate:
- State chosen (usually by the IT client manager) to request Regesta to estimate the effort required to process the request, before proceeding.

d) Estimated:
- Status set by the Regesta consultant to whom the ticket has been assigned in the "To estimate" status, after having populated the "Estimated Days" field;
- If the ticket is in this state, DO NOT carry out any activities on the ticket by Regesta.

e) Open:
- It is the state that authorises Regesta to take charge of the activity;
- It can represent:
    - the initial status of the ticket, if it is entered by a user who is not subject to approval and no estimation by Rege-sta is required;
    - In other cases it can represent an intermediate status of the ticket, in the cases in which:
        - has been inserted by a user subject to approval and has been approved by an Administrator;
        - a preliminary estimate by Regesta is required, Regesta has estimated it and the Client's Administrator has approved the estimate.

f) Released in test:
- Set by the Regesta consultant, responsible for ticket processing, at the time of identification and resolution of the problem reported;
- Allows you to inform the user who entered the ticket (and any administrators-strators) that the request has been processed in the test environment, in order to set one of the following states.

g) To setup in PROD:
- When the Regesta consultant sets the ticket to the "Issued in test" status, the communication is sent to the user who has entered the ticket for its validation;
- The user can put it in the "To put in PROD" state or bring it back in the "Open" state in case their tests verify the lack of resolution of the problem initially highlighted in the ticket;
- The status is managed exclusively by the customer user, not by Regesta consultants;
- **Attention! This status is optional.**

h) Released in prod:
- Status managed by Regesta consultants, it is used to inform the customer that the changes requested in the ticket have been transpor ted into production;
- The transition to this state can be made either from the previous "To put in PROD" or directly from previous states.

i) Close:
- The setting of this status on a ticket (by a User of the customer or Regesta) will certify the completion of the work for the selected ticket;
- **Attention! In order to avoid that "Issued in prod" tickets remain in this state for a period of time a special job will automatically close all the tickets in the state of released into production more than 90 days ago.**

4.2   Email notifications

The main events related to the life of a ticket, described above, are associated with a workflow of sending e-mails to the Customer's and/or Regesta's Users. In this way, depending on the type of user who has modified the ticket itself, it is always possible to automatically keep the interested persons of both companies updated. The workflows that exist today are illustrated below.

a) **Creation of a ticket with status "To approve Area admin"**: as soon as the ticket has been saved the system dispatches an email to the customer User identified as Administrator of the Area to whom the ticket refers, as well as to the Administrator of the Plant, if both exist;
b) **Creation/Modification of a ticket with status "To approve IT admin"**: as soon as the ticket has been saved the system dispatches an email to the customer User identified as IT Administrator (of the group or of the plant depending on the user mapping);
c) **Creation/Modification of a ticket with status "To estimate"**: as soon as the ticket has been saved the system dispatches an email to Regesta, to require an estimation of the effort;
d) **Creation/Modification of a ticket with status "Estimated"**: as soon as the ticket has been saved the system dispatches an email to the customer users of type "Administrator", to inform them about the estimation and to require them, in case of acceptance, to update the ticket with the status "Open";
e) **Creation/Modification of a ticket with status "Open"**: as soon as the ticket has been saved (and therefore forwarded to Regesta) the system dispatches an email to the customer user that has created or modified the ticket, to confirm the reception. At the same time the system dispatches an email to Regesta consultants responsible for the Area to whom the ticket refers;
f) **Creation/Modification of a ticket with status "Released in test"**: as soon as Regesta completes all the activities to solve the issue, the system dispatches an email to the customer user that has created the ticket, in order to allow him to check if the solution fulfils the requirement and so to validate the ticket**;**
g) **Creation/Modification of a ticket with status "To setup in PROD"**: as soon as the ticket has been saved the system dispatches an email to Regesta consultant in charge for the ticket, to inform him to arrange the transport in Production Environment on the date specified;
h) **Creation/Modification of a ticket with status "Released in PROD"**: as soon as the ticket has been saved, the system dispatches an email to the customer user that has created

the ticket, in order to inform him that the changes have been moved to the production environment;

i) **Creation/Modification of a ticket with status "Close"**: as soon as the ticket has been saved, the system dispatches an email to Regesta consultant in charge for the ticket, to inform him.

4.3   Other informations

The field "other information" within the ticket modification tool has been introduced a new feature to manage communication between User and Regesta during the life cycle of the ticket. In this way:

a) The modification of the extended text contained in the "Text" field in the "Request" section, which must contain the original request of the user who inserted the ticket, is avoided;

b) The need for email communications related to the ticket and unrelated to the tool between users or administrators of the customer and Rege-sta consultants is avoided or minimized;

c) The history of the communications is tracked in a "chat-like" mode, keeping everything in a single new field, called "Other information" and contained in the "Closing" section. The field will be visible only after saving the original ticket, when users or administrators of the customer or Regesta consultants will change the ticket itself.