

 **versaSRS** User Training

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Silver Application Development

# Exercise – Updating Cases

The aim of this exercise is to educate versaSRS Users on how to update Cases in versaSRS.

**Note:** If you have not yet created a Case in versaSRS please see the first exercise regarding Case creation before proceeding with this exercise.

Contents:

- Logging in
- Adding a Comment to a Case
- Sending an Email from a Case
- Responding to the Requestor
- Replying to the Case
- Replying from a Case
- Closing a Case

# Logging In



Browse to the URL below in your standard browser:

<https://versaSRS.virginaustralia.com/versaSRSTesting/>

Log in via your username and password:

WelcomeVA!

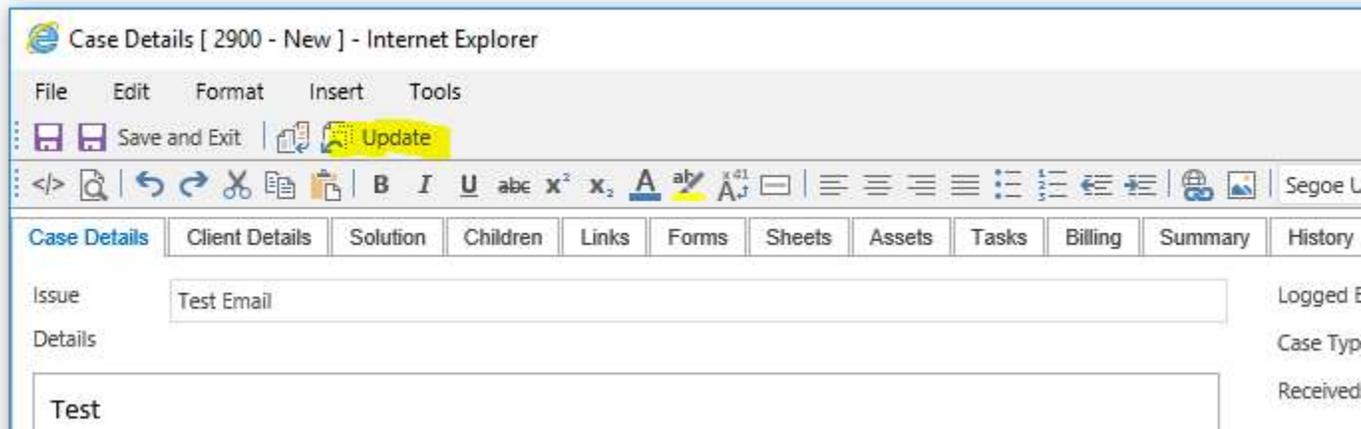
(Please note that when the system is live users will log in via ADFS or Single Sign On)

You may need to allow popups for the URL. Then launch the URL again.

# Adding a Comment to a Case

Double click your existing Case that was created via email to open it.

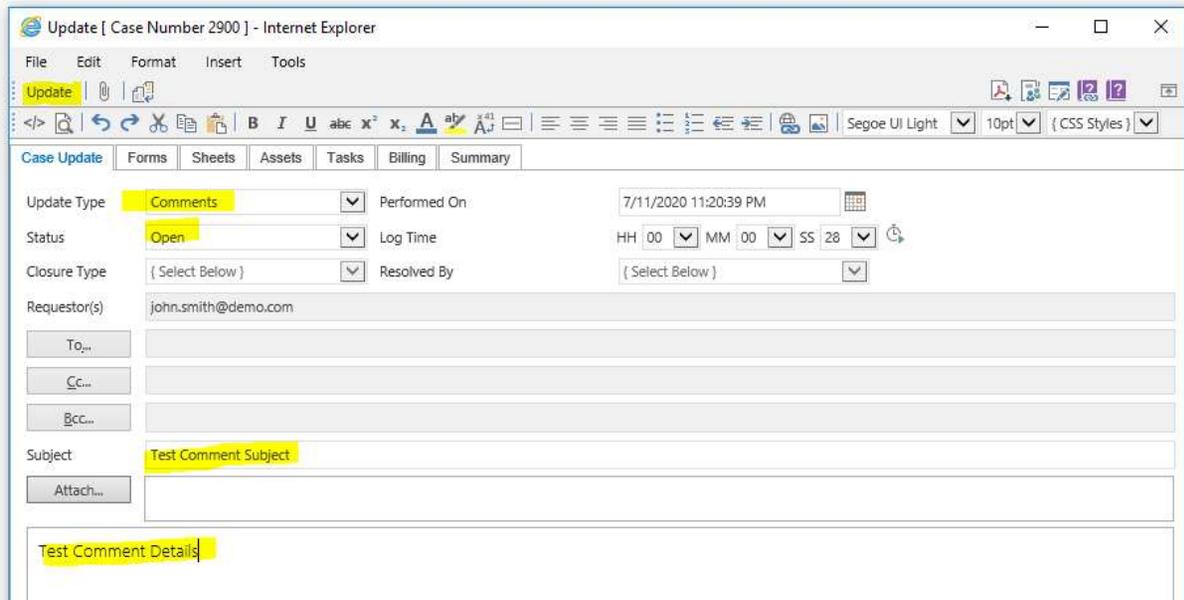
Click the Update icon to launch the Update Screen.



# Adding a Comment to a Case

On the Case Update screen set the Update Type to Comment and the Status to Open.

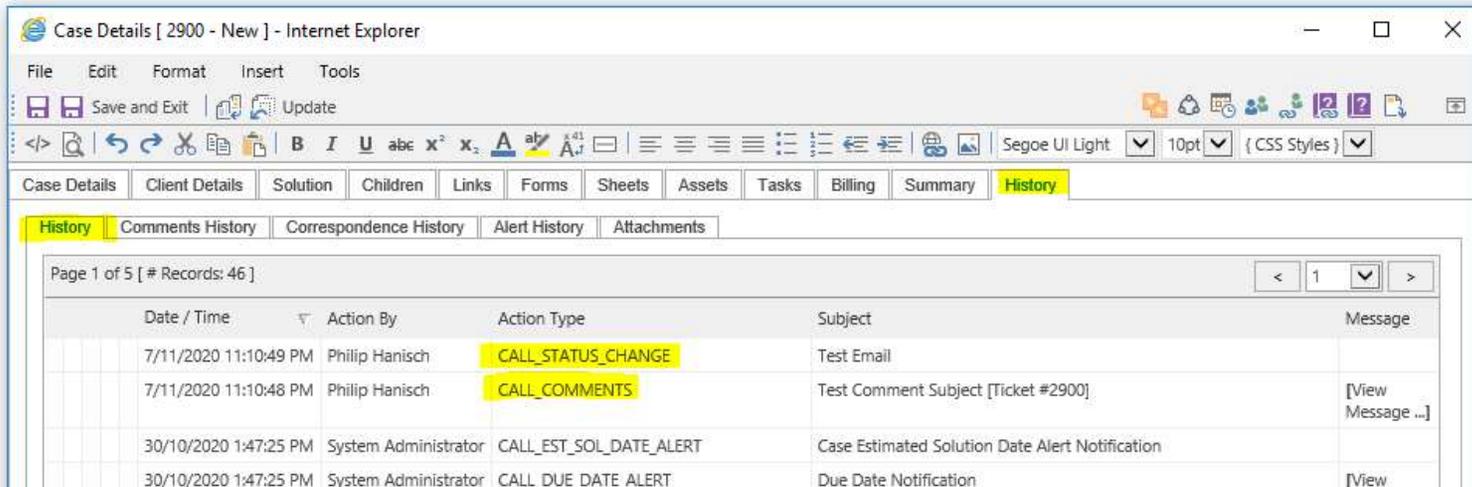
Enter a subject and details of your choice and click the Update Button



The screenshot shows the 'Update [ Case Number 2900 ] - Internet Explorer' window. The browser's address bar shows the URL. The page title is 'Update [ Case Number 2900 ] - Internet Explorer'. The browser's menu bar includes File, Edit, Format, Insert, and Tools. The browser's toolbar includes various icons for navigation and editing. The page content is a form for updating a case. The form has several tabs: Case Update, Forms, Sheets, Assets, Tasks, Billing, and Summary. The 'Case Update' tab is active. The form fields are: Update Type (Comments), Status (Open), Closure Type (Select Below), Requestor(s) (john.smith@demo.com), Performed On (7/11/2020 11:20:39 PM), Log Time (HH:00 MM:00 SS:28), and Resolved By (Select Below). The Subject field contains 'Test Comment Subject'. There are buttons for 'To...', 'Cc...', 'Bcc...', and 'Attach...'. The 'Test Comment Details' field is empty.

# Adding a Comment to a Case

**Checkpoint:** Back on the Case window select the History tab and then the inner History tab as shown. The comment should be displayed as part of the Case history here.



Case Details [ 2900 - New ] - Internet Explorer

File Edit Format Insert Tools

Save and Exit Update

Case Details Client Details Solution Children Links Forms Sheets Assets Tasks Billing Summary **History**

**History** Comments History Correspondence History Alert History Attachments

Page 1 of 5 [ # Records: 46 ]

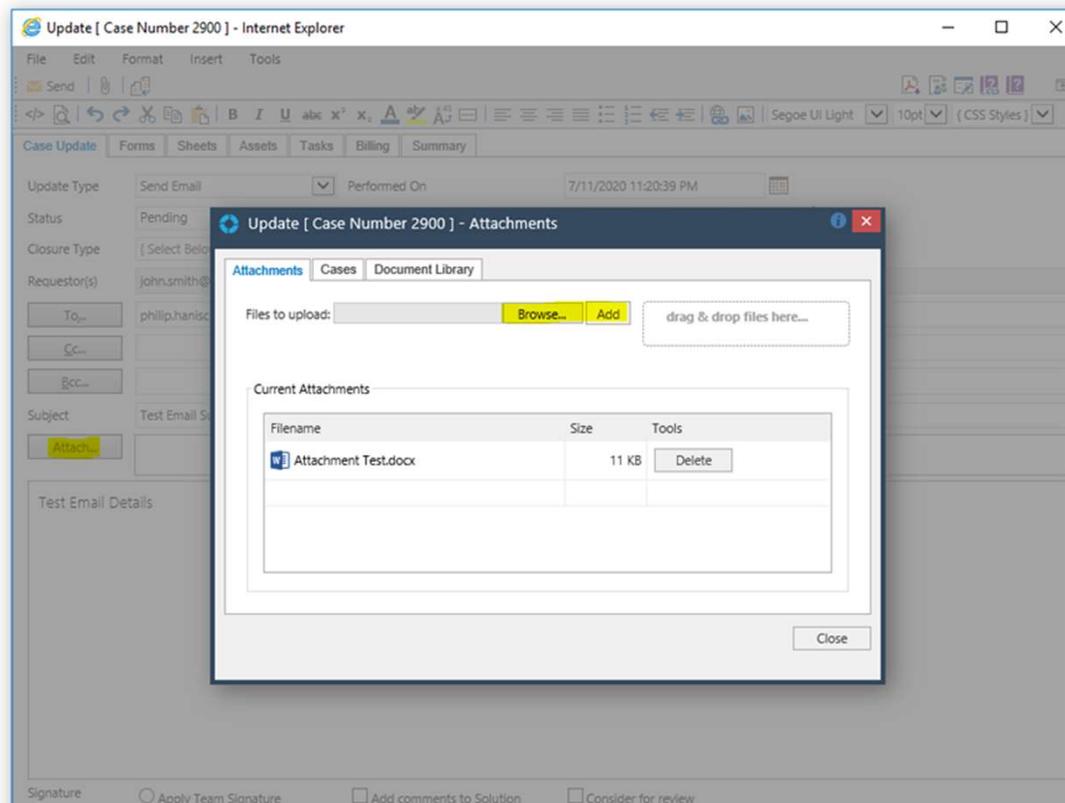
Date / Time	Action By	Action Type	Subject	Message
7/11/2020 11:10:49 PM	Philip Hanisch	CALL_STATUS_CHANGE	Test Email	
7/11/2020 11:10:48 PM	Philip Hanisch	CALL_COMMENTS	Test Comment Subject [Ticket #2900]	[View Message ...]
30/10/2020 1:47:25 PM	System Administrator	CALL_EST_SOL_DATE_ALERT	Case Estimated Solution Date Alert Notification	
30/10/2020 1:47:25 PM	System Administrator	CALL_DUE_DATE_ALERT	Due Date Notification	[View

Double clicking the entry will show the comment that was made.



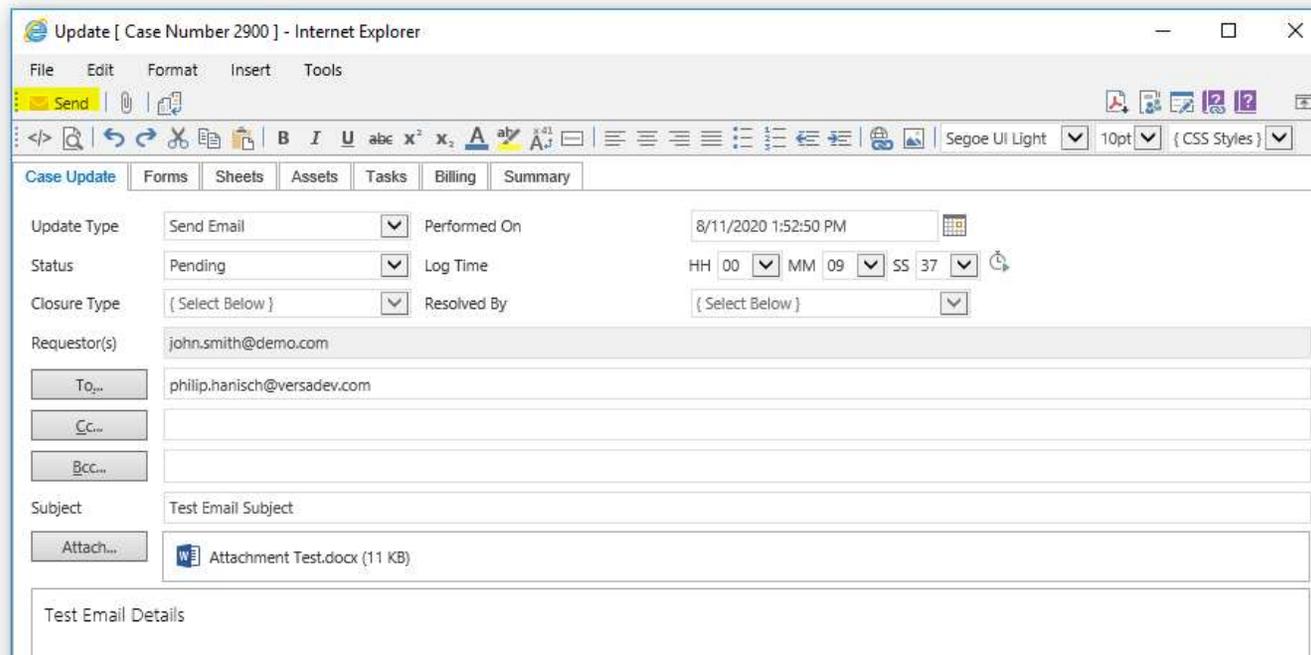
# Sending an email from a Case

Add an attachment to the Email by clicking the Attachment button. A file can be selected and then added or the drag and drop platform can be used.



# Sending an email from a Case

Once the attachment has been added it will be visible in the Case Update screen. Click the Send button to send the email



Update [ Case Number 2900 ] - Internet Explorer

File Edit Format Insert Tools

Send

Case Update Forms Sheets Assets Tasks Billing Summary

Update Type: Send Email (dropdown) Performed On: 8/11/2020 1:52:50 PM (calendar icon)

Status: Pending (dropdown) Log Time: HH 00 (dropdown) MM 09 (dropdown) SS 37 (dropdown) (refresh icon)

Closure Type: { Select Below } (dropdown) Resolved By: { Select Below } (dropdown)

Requestor(s): john.smith@demo.com

To...: philip.hanisch@versadev.com

Cc...:

Bcc...:

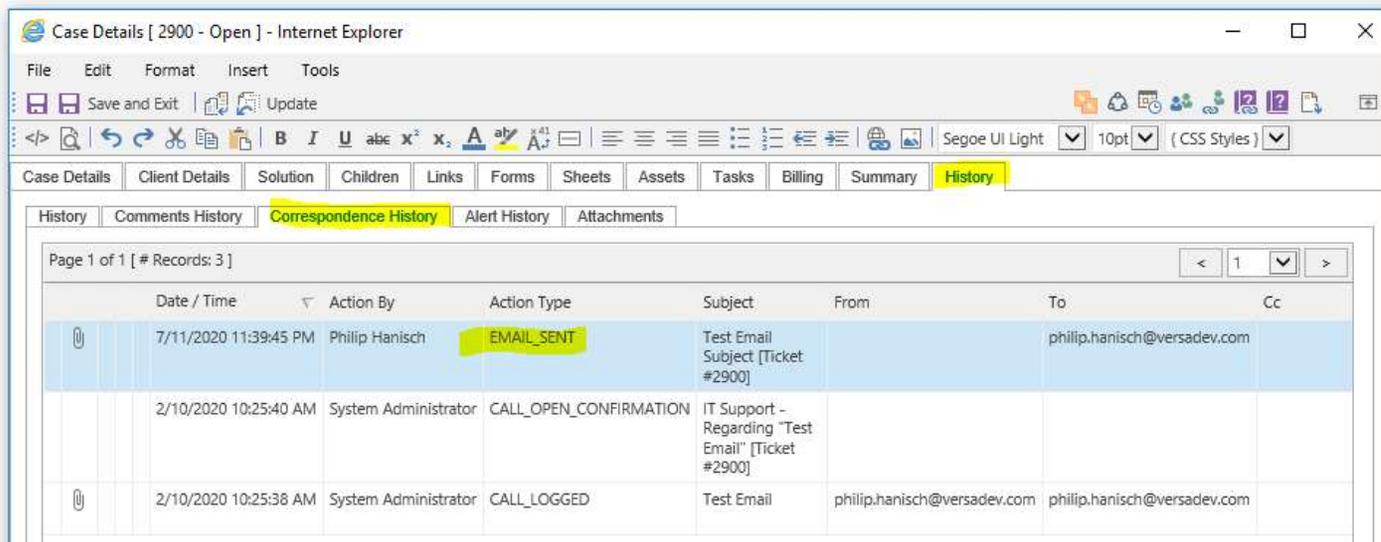
Subject: Test Email Subject

Attach...: Attachment Test.docx (11 KB)

Test Email Details

# Sending an email from a Case

**Checkpoint:** This will send out the email from the Case to the email address specified. Back on the Case window select the History tab and in the inner tab of Correspondence History it should show the entry with the EMAIL\_SENT Action Type.



Case Details [ 2900 - Open ] - Internet Explorer

File Edit Format Insert Tools

Save and Exit Update

Case Details Client Details Solution Children Links Forms Sheets Assets Tasks Billing Summary **History**

History Comments History **Correspondence History** Alert History Attachments

Page 1 of 1 [ # Records: 3 ]

	Date / Time	Action By	Action Type	Subject	From	To	Cc
	7/11/2020 11:39:45 PM	Philip Hanisch	<b>EMAIL_SENT</b>	Test Email Subject [Ticket #2900]		philip.hanisch@versadev.com	
	2/10/2020 10:25:40 AM	System Administrator	CALL_OPEN_CONFIRMATION	IT Support - Regarding "Test Email" [Ticket #2900]			
	2/10/2020 10:25:38 AM	System Administrator	CALL_LOGGED	Test Email	philip.hanisch@versadev.com	philip.hanisch@versadev.com	

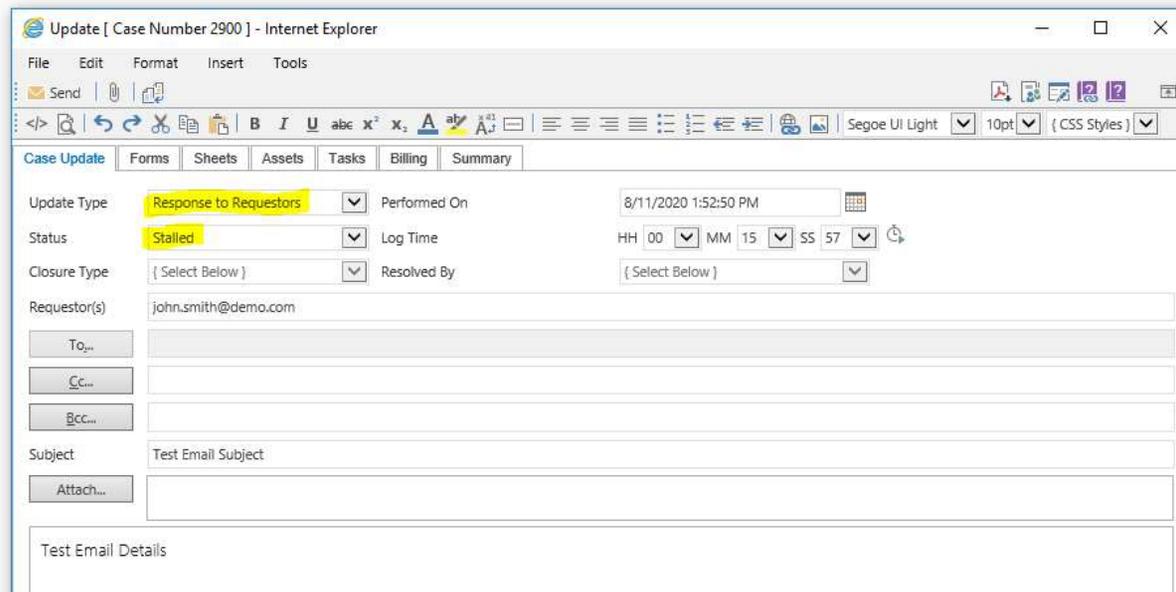
Double clicking the entry will show the email that was sent.

# Responding to the Requestor

On the Case screen click the Update icon to launch the Update screen.

Set the Update Type to Response to Requestors and the Status to Stalled.

Add a subject and details of your choice.



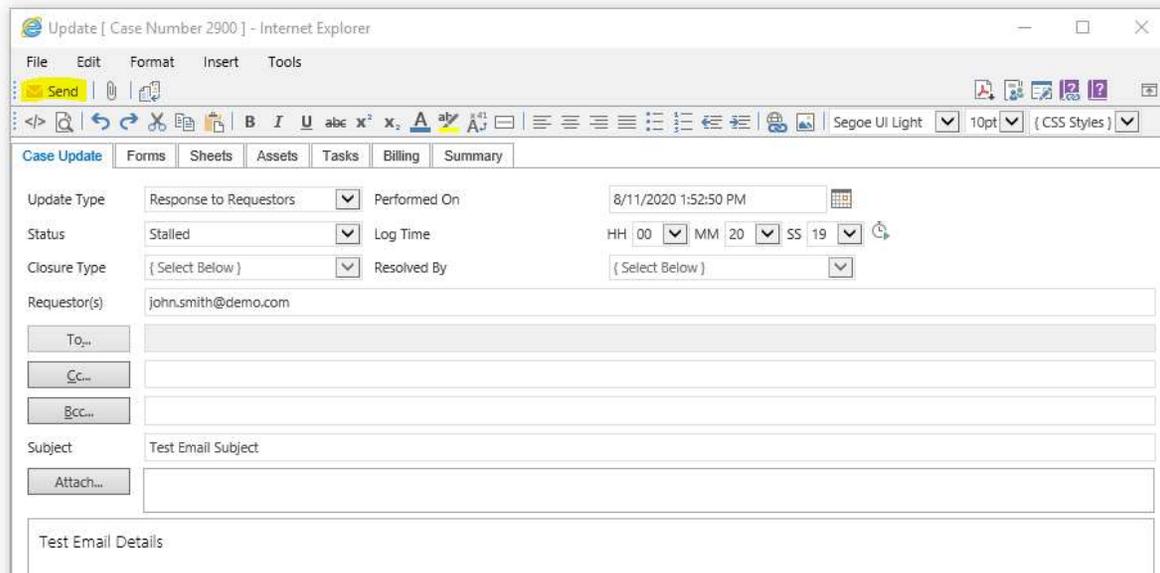
The screenshot shows a web browser window titled "Update [ Case Number 2900 ] - Internet Explorer". The browser's address bar and menu bar are visible. The main content area displays a "Case Update" form with several tabs: "Case Update", "Forms", "Sheets", "Assets", "Tasks", "Billing", and "Summary". The "Case Update" tab is active. The form contains the following fields and controls:

- Update Type:** A dropdown menu with "Response to Requestors" selected.
- Status:** A dropdown menu with "Stalled" selected.
- Performed On:** A date and time field showing "8/11/2020 1:52:50 PM".
- Log Time:** A time field showing "HH:MM:SS" with values "00", "15", and "57" respectively.
- Closure Type:** A dropdown menu with "{ Select Below }" selected.
- Resolved By:** A dropdown menu with "{ Select Below }" selected.
- Requestor(s):** A text input field containing "john.smith@demo.com".
- To...:** A button next to an empty text input field.
- CC...:** A button next to an empty text input field.
- BCC...:** A button next to an empty text input field.
- Subject:** A text input field containing "Test Email Subject".
- Attach...:** A button next to an empty text input field.
- Test Email Details:** A section at the bottom of the form with an empty text input field.

# Responding to the Requestor

Notice that this time the To field is disabled and the Requestor(s) field containing the email address that is set on the Client Details tab of the Case is what the email will be sent to.

Click the Send Button to send the email to the Requestor of the Case.



The screenshot shows a web browser window titled "Update [ Case Number 2900 ] - Internet Explorer". The browser's address bar and menu bar are visible. The main content area displays a form with several tabs: "Case Update", "Forms", "Sheets", "Assets", "Tasks", "Billing", and "Summary". The "Case Update" tab is active. The form contains the following fields and controls:

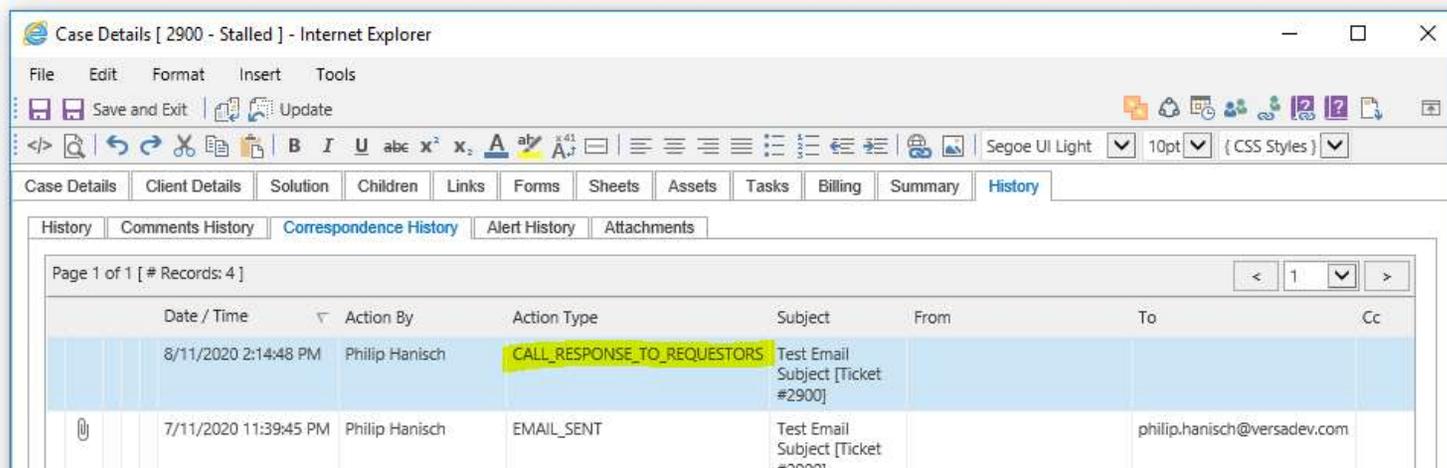
- Update Type:** A dropdown menu set to "Response to Requestors".
- Performed On:** A date and time field showing "8/11/2020 1:52:50 PM".
- Status:** A dropdown menu set to "Stalled".
- Log Time:** A time field showing "HH 00 MM 20 SS 19".
- Closure Type:** A dropdown menu set to "{ Select Below }".
- Resolved By:** A dropdown menu set to "{ Select Below }".
- Requestor(s):** A text field containing "john.smith@demo.com".
- To, Cc, Bcc:** Three disabled text input fields for email recipients.
- Subject:** A text field containing "Test Email Subject".
- Attach...:** A button for attaching files.
- Send:** A yellow button for sending the email.

At the bottom of the form, there is a section labeled "Test Email Details".

# Responding to the Requestor

**Checkpoint:** Back on the Case window select the History tab and in the inner tab of Correspondence History it should show the entry with the CALL\_RESPONSE\_TO\_REQUESTORS Action Type.

Double clicking the entry will show the email that was sent.



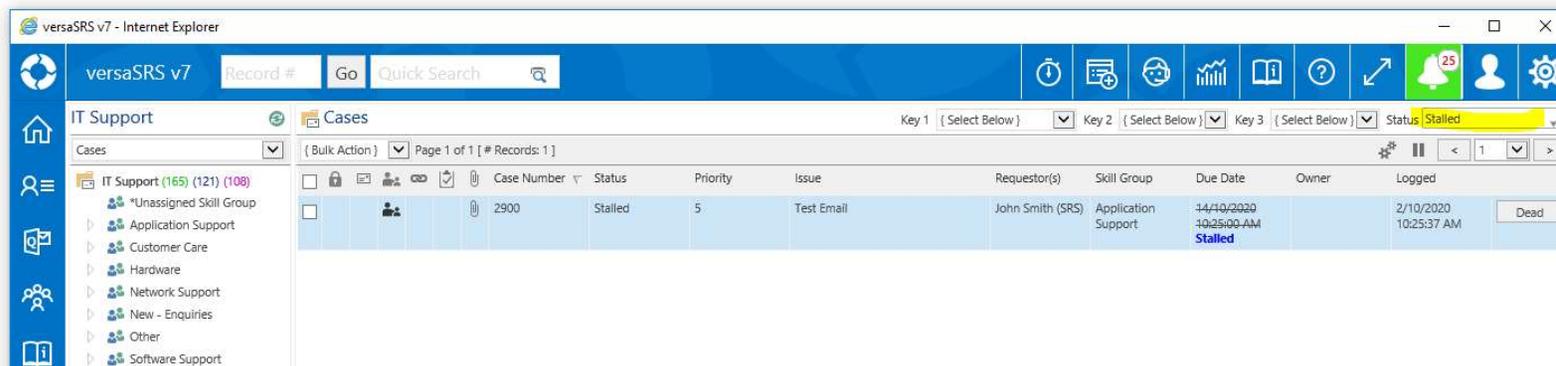
# Responding to the Requestor

Back on the main versaSRS screen Team View click the refresh button.

You will notice that this Case is not displayed. This is because the Status was set to Stalled which moves it off of the Current Status view.

A stalled status is used when waiting for an external response. This will essentially stop the clock so that the time waited won't count towards the due date and impact SLA's.

Click the Status Drop Down filter in the top right of the screen and select Stalled. Now the case should be listed in the Stalled Status View.



The screenshot shows the versaSRS v7 interface in Internet Explorer. The main content area displays a table of cases. The status filter is set to 'Stalled'. A single case is visible with the following details:

Case Number	Status	Priority	Issue	Requestor(s)	Skill Group	Due Date	Owner	Logged	Dead
2900	Stalled	5	Test Email	John Smith (SRS)	Application Support	14/10/2020 10:25:00 AM <b>Stalled</b>		2/10/2020 10:25:37 AM	<input type="checkbox"/>

# Replying to the Case

When requestors or recipients receive emails from the Case it will include a ticket number in the Subject. This is used to track replies back to the Case. If the previous slides were completed then you should have some emails arrived in your personal Inbox from the Case.

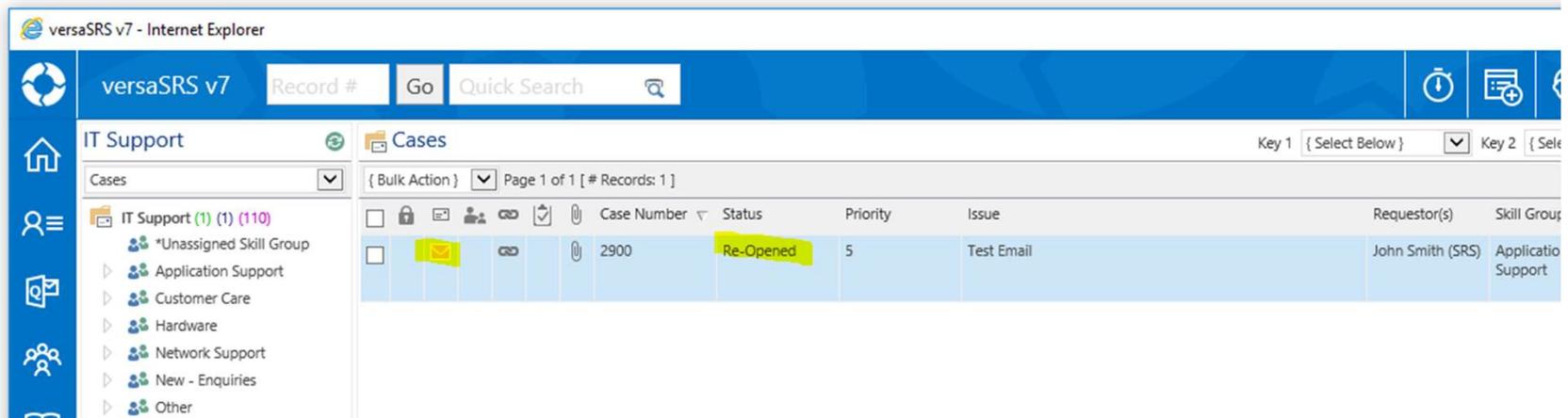
Reply to one of these Case emails from your outlook or other personal email client.

After a minute the email should come through and update the Case.

# Replying to the Case

Ensure that the Status Drop down is set to Current and refresh the Team View.

When the email comes through it should log against the existing Case and set the Status to Re-opened. You will also notice an unread email icon displayed showing there is an unread email on the Case.



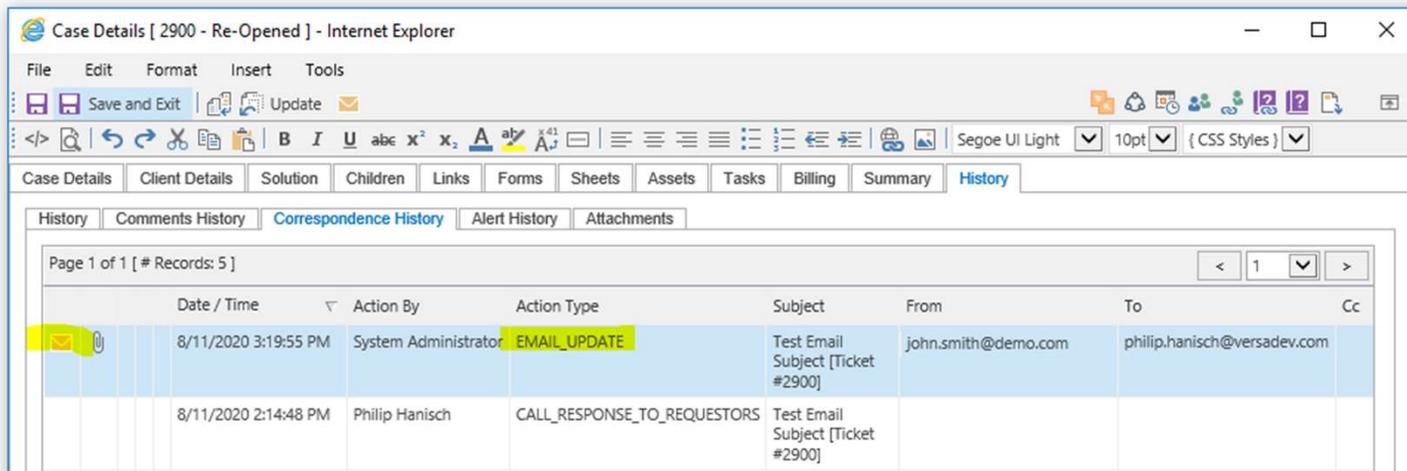
The screenshot displays the versaSRS v7 web application interface. The top navigation bar includes the 'versaSRS v7' logo, a search bar with 'Record #' and 'Go' buttons, and a 'Quick Search' field. The left sidebar shows a navigation menu with icons for home, search, and user management, along with a list of categories: IT Support (1) (110), \*Unassigned Skill Group, Application Support, Customer Care, Hardware, Network Support, New - Enquiries, and Other. The main content area is titled 'Cases' and shows a table with one record. The record has a status of 'Re-Opened' (highlighted in yellow) and an unread email icon (a yellow envelope with a red exclamation mark) in the first column. The table columns are Case Number, Status, Priority, Issue, Requestor(s), and Skill Group. The record details are: Case Number 2900, Status Re-Opened, Priority 5, Issue Test Email, Requestor(s) John Smith (SRS), and Skill Group Application Support.

	Case Number	Status	Priority	Issue	Requestor(s)	Skill Group
<input type="checkbox"/>	2900	Re-Opened	5	Test Email	John Smith (SRS)	Application Support

# Replying to the Case

**Checkpoint:** Open the Case and click the History Tab and in the inner tab of Correspondence History it should show the entry with the EMAIL\_UPDATE Action Type. You can double click this to view the email update.

While the requestors of Cases will generally not be the users, this exercise was to show how this process works for someone replying back to a Case.

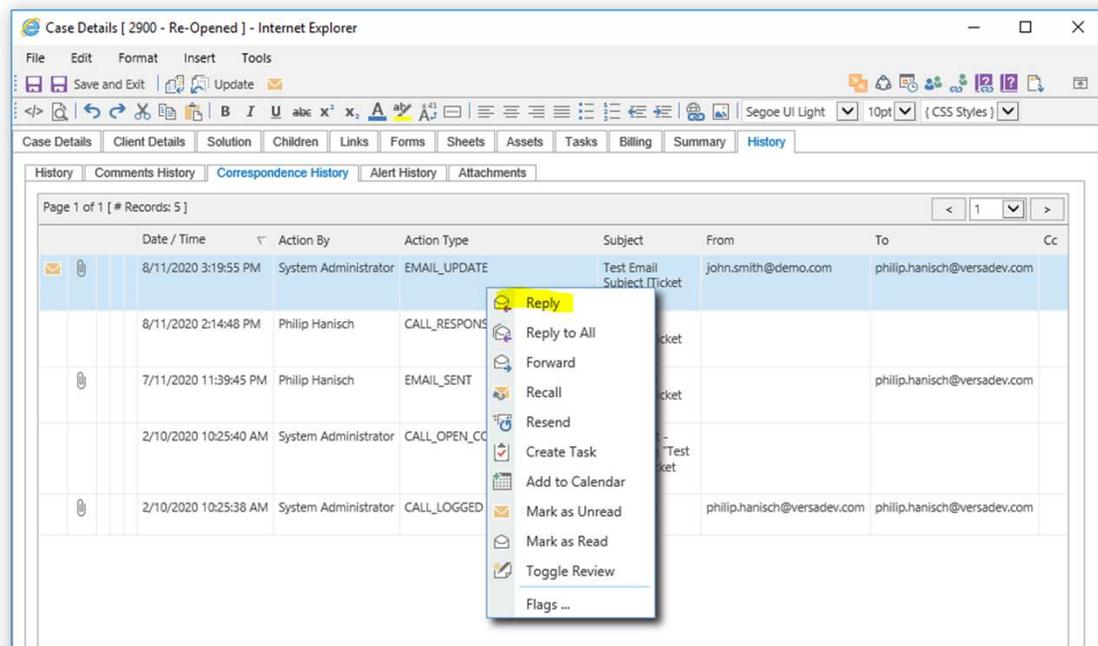


Date / Time	Action By	Action Type	Subject	From	To	Cc
8/11/2020 3:19:55 PM	System Administrator	EMAIL_UPDATE	Test Email Subject [Ticket #2900]	john.smith@demo.com	philip.hanisch@versadev.com	
8/11/2020 2:14:48 PM	Philip Hanisch	CALL_RESPONSE_TO_REQUESTORS	Test Email Subject [Ticket #2900]			

# Replying from a Case

When email updates are received to the Case, often you will need to reply back and include the email trail. This can be done on the Case by right clicking the EMAIL\_UPDATE entry in the History Tab and clicking Reply, Reply All or Forward.

Right click the EMAIL\_UPDATE entry and select Reply.





# Replying from a Case

Compose an email and click Send.

**Checkpoint:** This will send the email reply back to the Requestor.

The Update Type can be either Response to Requestor or Send Email when responding back to the Requestor.

The Reply All and forward options from the right click menu will also include the email trail to the entry that is being replied to.

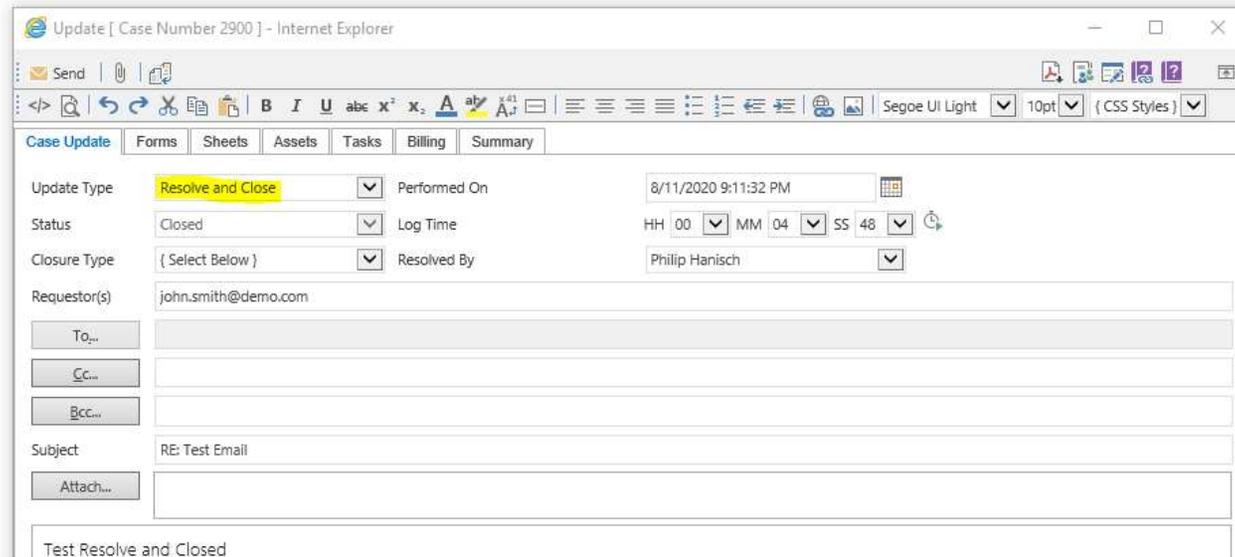
Replying to the initial email that created the Case can be done by right clicking the CALL\_LOGGED audit entry.

# Closing a Case

Closing a Case in versaSRS can be as simple as doing a Case Update Comment and selecting Closed as the Status.

However If an email response is to be sent to the Requestor while simultaneously closing the Case then the Resolved and Closed Status is used.

Update your existing Case and set the Update Type to Resolved and Closed.



Update [ Case Number 2900 ] - Internet Explorer

Send | | |

Case Update | Forms | Sheets | Assets | Tasks | Billing | Summary

Update Type: **Resolve and Close** | Performed On: 8/11/2020 9:11:32 PM

Status: Closed | Log Time: HH:00 MM:04 SS:48

Closure Type: { Select Below } | Resolved By: Philip Hanisch

Requestor(s): john.smith@demo.com

To: |

Cc: |

Bcc: |

Subject: RE: Test Email

Attach: |

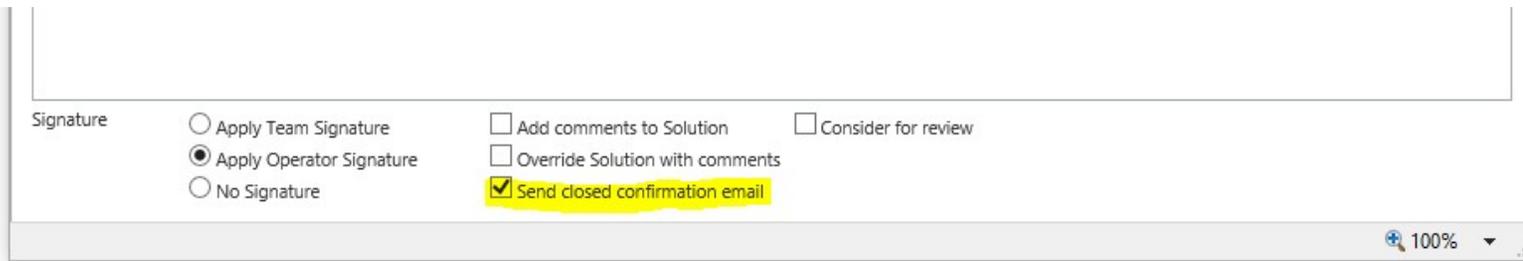
Test Resolve and Closed

# Closing a Case

Notice that the Status field is now set to Closed and can't be changed while in this Update Type.

When the Status is set to Closed the optional Closure Type field is available as a way to categorise the closure.

When closing a Case the checkbox at the bottom called "Send closed confirmation email" is enabled. Checking this will send an additional template response to the Requestor as confirmation to them that the Case has been closed.



Signature

Apply Team Signature       Add comments to Solution       Consider for review

Apply Operator Signature       Override Solution with comments

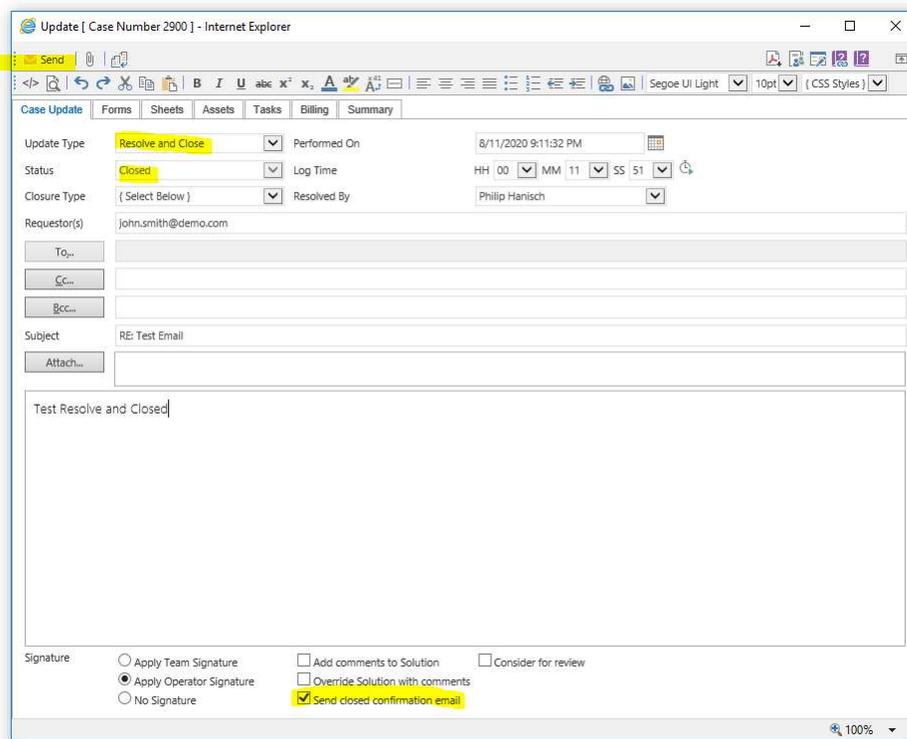
No Signature       Send closed confirmation email

100%

# Closing a Case

Compose a closure response and ensure the “Send closed confirmation email” checkbox is checked.

Click Send to email the Requestor and Close the Case.



Update [ Case Number 2900 ] - Internet Explorer

Send

Case Update | Forms | Sheets | Assets | Tasks | Billing | Summary

Update Type: **Resolve and Close** | Performed On: 8/11/2020 9:11:32 PM

Status: **Closed** | Log Time: HH:00 MM:11 SS:51

Closure Type: ( Select Below ) | Resolved By: Phillip Hanisch

Requestor(s): john.smith@demo.com

To: [ ]

Cc: [ ]

Bcc: [ ]

Subject: RE: Test Email

Attach: [ ]

Test Resolve and Closed

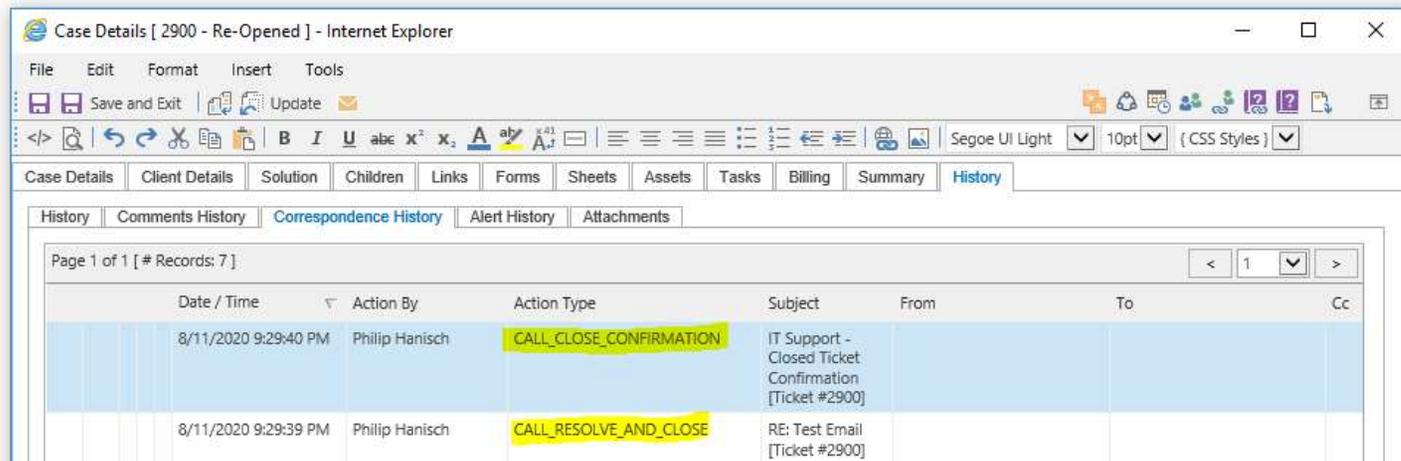
Signature:  Apply Team Signature  Add comments to Solution  Consider for review  
 Apply Operator Signature  Override Solution with comments  
 No Signature  **Send closed confirmation email**

100%

# Closing a Case

**Checkpoint:** On the Case click the History Tab and in the inner tab of Correspondence History it should show the entry with the CALL\_RESOLVED\_AND\_CLOSED Action Type. You can double click this to view the resolved and closed email update.

There is another audit entry created for CALL\_CLOSE\_CONFIRMATION which is the Closed Confirmation email that gets sent to the requestor in addition to the Resolved and Closed email response.



Date / Time	Action By	Action Type	Subject	From	To	Cc
8/11/2020 9:29:40 PM	Philip Hanisch	CALL_CLOSE_CONFIRMATION	IT Support - Closed Ticket Confirmation [Ticket #2900]			
8/11/2020 9:29:39 PM	Philip Hanisch	CALL_RESOLVE_AND_CLOSE	RE: Test Email [Ticket #2900]			

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