

**ORACLE®**

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**ATG WEB COMMERCE**

Ticketing

Version 10.1.2

User Guide

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# ATG Ticketing User Guide

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# 1 Introduction

This guide is designed to help business users understand and work with ATG Ticketing in Service Center.

## Audience

This guide is designed to help both administrators and users of Service Center understand and work with ATG Ticketing.

## Documentation Conventions

The following conventions are used in this manual:

- Home Directories

<ATG10dir> – The directory where you installed ATG 10.1. For example, the default location for UNIX installations is `C:/ATG/ATG10.1`

- Menu Navigation

The “>” (greater than) symbol indicates menu choices. For example, “File > Save” means you should select the Save option on the File menu.

## Related Documentation

Guide Title	Description
<i>ATG Service Center UI Programming Guide</i>	This book deals with Service Center User Interface, and provides instructions on configuration and UI customization of all ATG products that use Service Center.

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<b>Guide Title</b>	<b>Description</b>
<i>ATG Service Installation and Configuration Guide</i>	This book was designed to assist in the installation and configuration of ATG Service. This covers creating the ATG Service environment, including Oracle ATG Web Knowledge Manager and Oracle ATG Web Knowledge Manager Self Service, as well as creating internal and external users, configuring sites and working with other ATG products.
<i>ATG Commerce Service Center Installation and Programming Guide</i>	This book was designed to assist in the installation and configuration of Oracle ATG Web Commerce Service Center. This includes setting up and creating Commerce Service Center servers, creating agent and customer profiles, customizing returns and exchange engines, customizing promotions and integrating with other ATG products.
<i>ATG Knowledge Manager Guide for Business Users</i>	Designed to help business users understand and work with Knowledge Manager and Service Center user interface. Describes how to perform typical tasks such as searching for content, creating complex search queries, authoring content and sending content by e-mail.
<i>ATG Commerce Service Center User Guide</i>	Designed to help business users understand and work with Commerce Service Center and Service Center user interface. Describes how to perform typical tasks such as working with orders, assisting customers, changing customer profiles and working with promotions.

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## 2 ATG Ticketing Overview

The following section provides an overview of ATG Ticketing.

### About ATG Ticketing

Tickets represent customer inquiries or events (issues, cases, incidents). ATG Ticketing enables you to record and track customer and transaction driven inquiries and events received through your call center, order placement, or similar applications.

Depending on the other ATG applications currently in use within your organization, ATG Ticketing related items and features are available from Service Center user interface including:

- Global context area – for accessing active tickets, current ticket/ticket activities, and current ticket customer information
- Tickets panel – for creating and modifying tickets
- Customers panel – for creating and modifying customer profiles
- Tasks panel – for working with ticket tasks

### ATG Ticketing Features

Whenever an agent deals with a customer, they are working with a ticket. While the agent is working, there is always an active ticket. If the ticket has not been saved, the ticket is known as a *transient* ticket. If the ticket has been saved, the ticket is known as a *persistent* ticket.

Whenever an agent works within Service Center, they are working on a ticket. Whenever the agent makes changes, leaves Service Center or performs other actions, they are prompted with ticket *disposition* options, which change the state of the ticket.

### Creating and Modifying Tickets

New tickets are created through:

- Manual creation of tickets – by clicking on the Create New Ticket link
- Automatic creation of tickets – by performing an action, such as creating a new customer, that creates a ticket

Tickets can also be modified by:

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- Associating tickets with other tickets – this allows association of actions. For example, an agent can associate two separate tickets for one customer, allowing the agent to see a customer history
  - Escalating tickets for higher service levels – tickets can be escalated so that they may be reviewed by a supervisor or manager
  - Closing tickets as duplicates of other tickets – it is also possible to close duplicate tickets, or to identify a ticket as a duplicate of another

### **Working with Ticket Tasks**

When working with tickets the agent performs tasks that are specific to that ticket. An agent can claim a ticket task, indicating that the agent is performing actions that will affect the ticket. The agent can also sort ticket task lists by ticket status or by ticket assignment. Whenever an agent works with a ticket, the ticket disposition changes.

### **Creating and Modifying Customer Profiles**

Any customer information that the agent views or modifies is logged and stored within a ticket. Whenever an agent create a new customer, a new ticket is created.

## **Key Terms and Concepts**

The following are terms and concepts used throughout this guide:

### **Defer**

This action, available in the Next Steps panel, will postpone work on a ticket for a later date/time. The ticket status shown after a ticket has been deferred is *Pending*.

### **Escalate**

An attribute related to the assignment of a ticket or solution. Tickets can be escalated for further attention, work, and/or assignment.

### **Group**

Depending on group definitions, groups (ticket queues) can be set by the administrator to segment and/or designate ticket ownership and assignment.

### **Reason Codes**

In order to identify, differentiate, and/or track certain ticket actions and status changes, ATG Ticketing requires reason codes when changing a ticket assignment or ticket escalation level.

### **Reassign**

Reassign allows an agent or administrator to select another agent to work on the ticket. The current ticket ownership is released and the newly assigned agent assumes ownership of the ticket.

### **Release Ticket**

Release Ticket relinquishes individual ownership of a ticket assignment and sends the ticket to the ticket owning group (ticket queue).



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## **Send to Group**

Select to assign a ticket to a ticket owning group (ticket queue). The current ticket ownership is released and the assigned group assumes ownership.

## **Solution**

Solutions are answers, suggestions, workarounds, or responses to queries, incidents, or problems. Solutions are stored in the knowledgebase for information sharing.

## **Source**

Source refers to where the ticket or activity originated. Source can be customer, user, or system generated (such as a ticket status change, or reassignment).

## **Ticket Claim Status**

Ticket Claim Status indicates the condition of the ticket work assignment.

## **Ticket Status**

Ticket Status indicates the current condition of a ticket (such as Closed, Closed as Duplicate, Open, Pending).



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# 3 ATG Ticketing Configuration and Administration

Use the Business Control Center to add ATG Ticketing users, organizations, and queues. Use the ATG Control Center (ACC) to modify information in the ATG Ticketing/Service Center user interface. This section is provided for those who will be performing administration tasks for ATG Ticketing.

## ATG Ticketing Overview

ATG Ticketing is not a separate product, but part of the ATG platform, ATG Service and Oracle ATG Web Commerce Service Center applications.

ATG Ticketing logically groups customer interactions and/or related activities. Tickets are stored as repository items that are accessible using the ATG Control Center (ACC).

Whenever an agent or a customer performs an action, a ticket is generated or modified. As such, there is always an active ticket, regardless if the ticket is transient or persistent.

When changes are made to the active ticket, either by explicitly creating a new ticket or selecting a different ticket, the user may be prompted with a set of ticket disposition options or warnings. Warnings and the disposition options are directly related to the completion of the action selected by the agent and must be addressed before changes to the ticket can occur.

## Requirements

The following are required when using ATG Ticketing:

- For ATG product-supported environments and configuration information, refer to the Oracle ATG Commerce Supported Environments Matrix document in the My Oracle Support knowledge base
- Enable browser cookies and scripting to access ATG Ticketing and Service Center user interface

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# Ticket Queues

Ticket queues are created to designate relevant ticket assignment.

## Adding Ticket Queues

Ticket queues that have been added to the BCC are available for ticket assignment using the available Ticketing Group lists in Service Center. **Note:** If you do not already have organizations set up, you will need to create an organization before adding ticketing queues. Refer to the *ATG Business Control Center Administration and Development Guide* for information on creating organizations.

To add a ticket queue:

1. Log in to the BCC Home page > Personalization > Internal Users.
2. From the Browse tab Show drop-down list, select Organizations.
3. Click an existing organization name from the directory. The Organization page is displayed in the right pane (to create a new organization, click Create New button).
4. From the Organization page, click the Ticketing tab.
5. Click the Ticket Queues Add New button. The Ticket Queue: LogicalOrganizations page is displayed.
6. **Required:** From the LogicalOrganizations page, type a Name and a Description for the Ticket Queue. This is the name displayed in the Ticketing/Service Center user interface *Group* list.
7. From the Ticketing panel, set ticket queue ticket acceptance and ticket timing properties as required:

<b>Ticket Queue Acceptance/Timing Property</b>	<b>Description</b>
Accepting new tickets	Choose whether the ticket queue will accept ( <code>True</code> ), or not accept ( <code>False</code> ) new tickets. Default is <code>True</code> .
Automatically close ticket after (minutes)	Type the required number of minutes to automatically close a ticket.  These are not visible in Service Center.
Automatically close ticket after (minutes)	Type the required number of minutes to automatically close a ticket.  These are not visible in Service Center.
Escalate to default queue if not handled after (minutes)	Type the required number of minutes to automatically escalate a ticket if not handled by the designated queue.  These are the number of minutes a ticket can be open before being escalated to the default escalation queue for further work or attention. If set to zero (0), no limit is set, and the ticket will not be auto-escalated.  These are not visible in Service Center.

Ticket Queue Acceptance/Timing Property	Description
Remove from agent if not handled after (minutes)	<p>The number of minutes an agent/user (assigned to work on the ticket) in the queue can hold a ticket before it is automatically released (unassigned). If set to zero (0), no limit is set, and the ticket will not be auto-released.</p> <p>These are not visible in Service Center.</p>
Target SLA (minutes)	<p>Type the number of minutes required for a due date/time, based on your organization's service level agreement.</p> <p>These are the number of minutes to complete the ticket assignment (due date) before the ticket expires. If set to zero (0), no due date is set for the ticket.</p> <p>SLA minutes display as the ticket Due Date in Service Center.</p> <p>For example, to set the due date for the ticket queue at 24 hours from the time a ticket is created, type 1440 in the Target SLA (minutes) box (24 hours = 1440 minutes). When a ticket is created and assigned to the ticket queue, the due date is displayed (where applicable) in Service Center (for example; in the Ticket Summary panel).</p>

**Note:** Individual ticket queue settings take priority over global ticket queue settings. If you have set a value for the `DefaultQueueDataReader` (global ticket queue default settings) the system will first read the information set for an individual ticket queue, and then the global default settings.

8. Click the Escalation Info Add Existing button to select escalation information for the ticket queue. The Select an Item window is displayed.
9. From the Select an Item window, click Find, and then select a ticket queue from the available list. The selected queue is the ticket queue to which a ticket is escalated when requested (using the Escalate Ticket Next Step in Service Center).

**Note:** Escalate is an attribute on the ticket, not a ticket status. Escalating a ticket allows a ticket to maintain its status, but also reflects that the ticket has been marked for further research, help, or approval, based on your organization's escalation level definitions.

10. Click Create. The ticket queue is added to the organization and is available for ticket assignment using the Ticketing user interface Group list in Service Center.

## Global Ticket Queue Timing Properties

The following properties are part of the `GlobalTicketQueue`:

### DefaultQueueDataReader

The `DefaultQueueDataReader` allows additional calculations for ticket queue time-out values. Global default timing properties for ticket queues is 0.

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Global default settings for ticket queues are set using the ACC.

Property Name	Description
<code>onlyIfNoQueue=true</code>	If there is no ticket queue associated with a ticket, then ticket queue timing defaults will be applied. Defaults are set to zero (0).
<code>availabilityMinutes=0</code>	<code>availabilityMinutes</code> are the number of minutes a ticket can be open before being escalated for further work or attention. If set to zero (0) no limit is set, and the ticket will not be automatically escalated.
<code>deallocationMinutes=0</code>	<code>deallocationMinutes</code> are the number of minutes an agent/user can hold a ticket before it is auto-released (unassigned). If set to zero (0), no limit is set and the ticket will not be automatically released.
<code>inactivityMinutes=0</code>	<code>inactivityMinutes</code> are the number of minutes an outbound message can remain inactive (no response sent) before it is closed. If set to zero (0), the ticket will not be automatically released.
<code>slaMinutes=0</code>	<code>slaMinutes</code> are the number of minutes an agent/user has to complete the ticket assignment (due date) before the ticket is flagged and expires. If set to zero (0), no due date is set for the ticket.

**Note:** Individual queue settings take priority over global queue settings. If you have set value for the `DefaultQueueDataReader`, the system will first try to read the information set for an individual ticket queue, and then the global defaults. If the information is null, the global default values set on the `DefaultQueueDataReader` are used by setting the `onlyIfNoQueue` to `False`.

To change global default timing properties for ticket queues:

1. From the ACC, select Pages by Components > Components by Path.
2. From the Components tree, open `atg > ticketing`, and then double-click `DefaultQueueDataReader`. The `DefaultQueueDataReader` Component Editor is displayed.
3. Enter the number of minutes required in the `availabilityMinutes` box. For example, to set availability minutes for the ticket queue at 24 hours from the time a ticket was created, type 1440 in the `availabilityMinutes` box (24 hours = 1440 minutes).
4. Type the number of minutes required in the `deallocationMinutes` box. For example, to set deallocation minutes for the ticket queue at 12 hours from the time the ticket was created, type 720 in the `deallocationMinutes` box (12 hours = 720 minutes).
5. Type the number of minutes required in the `inactivityMinutes` box. For example, to set inactivity minutes for the ticket queue at 8 hours from the time the ticket was created, type 480 in the `deallocationMinutes` box (8 hours = 480 minutes).
6. Type the number of minutes required in the `slaMinutes` box. For example, to set the due date for the ticket queue at 24 hours from the time a ticket was created, type 1440 in the `slaMinutes` box (24 hours = 1440 minutes). When a ticket is created and assigned to the ticket queue, the due dates is displayed (where applicable) in Service Center (for example; in the Ticket Summary panel).

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## Setting Ticket Polling

To enhance performance levels for ticketing, you can set background polling intervals to zero. This disables polling for ticketing information.

To modify the ticket polling time, use the ACC to set the `pollInterval` property to zero in the `/framework/UI/atg/svc/ui/formhandlers/SearchAgentTicketsFormHandler` component, which controls how often the application polls for new tickets.

## Discarding Tickets

When working with tickets, an agent's actions may affect a ticket so that the ticket must be discarded. Only transient tickets can be discarded. `TicketDispositionMonitors`, in the `TicketingManager` determines if a ticket can be discarded. There are two types of tickets that can be discarded, and the ticket disposition monitors decide both cases.

The two types of discardable ticket are:

- Immediately discardable – The application has decided that the ticket can be discarded automatically because there is nothing worth saving on the ticket. If the ticket is immediately discardable, there will be no prompt that contains the actions related to the current ticket
- Discardable – This means that the ticket was not immediately discardable and the agent must decide if the ticket should be discarded. A ticket in this state will cause the Discard option to appear in the prompt, giving the agent a choice of whether or not to discard it. **Note:** The discard option will never appear for saved tickets

There are two ways that the `TicketDispositionMonitors` determine the type of the discardable ticket:

- Based on activities on the ticket – If the ticket has any activities beyond the base set of activities created when the ticket was created, then it is not immediately discardable. This is handled by the ticket disposition monitor located `atg/ticketing/ActivityTicketDispositionMonitor`
- Based on the value of specific properties on the ticket – If the ticket has properties that are not null, the ticket is not immediately discardable. The properties used for this test are configurable and is handled by the ticket disposition monitor in `atg/ticketing/PropertyTicketDispositionMonitor`

`Service.Agent` uses a ticket disposition monitor located at `atg/svc/agent/ticketing/ServiceTicketDispositionMonitor`. This monitor, which is configured with the profile update activities, will not let a ticket be discarded if it has any of the configured activities.

## Environment Monitoring

An environment is the collective state of an agent's current working context. The environment monitoring interface integrates applications with environment management and coordinates changes to global environment objects.

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Global objects are available to the agent through the UI and shared by all the applications. The current ticket and customer are examples of global environment objects. Global object changes can be triggered by the agent through UI gestures or programmatically by an application. When the object is changed, the global object is replaced with a different object of the same type.

The framework provides access to two global objects: Current Ticket and Current Customer. These two objects are always available and shared by all the applications using the UI framework. They are also represented in the UI's global context area.

Applications can expose their own global objects to the environment monitoring system. Environment Management API configuration enables an application to participate in changes to the exposed global environment objects by either requesting a change to a global object (including global objects that are not managed directly by the application) or by being notified of a global object change.

When the global environment is exposed by requesting a change to a global object, the API provides the ability to request that any global object be changed. For example, any application running in the framework can request that the active ticket be changed to a new ticket or another existing ticket.

When the global environment is exposed by being notified of a global object change, whenever a change is initiated, the application is notified and has a chance to attach dependent change details to the change request. This model allows an application to be aware of any changes taking place that may affect its own state. This takes place in a three step process.

1. Identifying environment changes before they are applied.

All changes to the environment objects, including any dependent changes, are first detected and summarized in a collection of change detail objects. An application participates in this process by monitoring for new change details and creating new change detail objects. Once all the details are collected about a change, the next, optional step is to generate warning messages related to the pending change.

For example, ApplicationY may have an object with dependencies on the active customer profile. Therefore, whenever the active customer is changed, ApplicationY may also want to change its object accordingly. In this case, ApplicationY would monitor for change details specific to the current customer and, when necessary, add a change detail for its own object.

2. Generating warning messages.

Warning messages are optional and are relative to a change initiated by an agent through a UI gesture. Applications that are participating in environment changes are polled to produce warning messages relative to the pending change. The agent must then respond to the warnings before the change can be applied. At this point in the process, the agent has the option of canceling or continuing with the change.

For example, ApplicationY may want to warn the agent that continuing with the change will adversely affect its dependent object. In this case, ApplicationY would contribute a warning relative to its dependent object, when necessary.

3. Applying the change.

The final step is to apply the change to the environment based on the aforementioned detail objects. Each application is responsible for changing the environment objects under its direct control. For example, the Service framework is responsible for applying a change to the current active ticket and customer, while an application only applies changes to its own objects.

For example, when ApplicationY is told to apply the change, it would scan for a change detail specific to its own object and apply it accordingly. (There would be another change detail for the active customer but ApplicationY would ignore it because it is not responsible for that environment object.)



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## Current Ticket Disposition

ATG Ticketing automatically handles the disposition of the current ticket whenever it changes. Whenever a different ticket is loaded into the environment because of a change request, one of several disposition options must be selected for the ticket being replaced (e.g. the current ticket).

For UI initiated changes, the framework automatically prompts the agent to select from a set of disposition options before the change can be completed. This prompt also has the option to cancel the change and leave the environment state unchanged.

The warnings and the ticket disposition options share the same UI prompt and therefore it is possible to see both warnings and the ticket disposition options in a single prompt.

Ticket disposition is configured using a set of `TicketDispositionMonitors`, for example `framework/Agent/svc/agent/ticketing/ServiceTicketDispositionMonitor` and `/atg/ticketing/TicketingManager`.

Warnings are configured for the ticket disposition options and can appear with or without the ticket disposition options. Whenever an environment object changes, all applications are notified before the change so they can provide warnings.

## Knowledge Manager Components and Classes

The following section describes some of the components and classes available for Environment Monitoring:

### EnvironmentTools

Class	<code>atg.svc.agent.environment.EnvironmentTools</code>
Component	<code>/atg/svc/agent/environment/EnvironmentTools</code>
Configuration	<code>environmentMonitors</code> – a list of <code>EnvironmentMonitor</code> components.

This class provides the core API for applying changes to the environment. It also provides API for accessing the ATG Service-managed environment objects such as the active ticket and customer profile.

### EnvironmentMonitor, ServiceEnvironmentMonitor, KnowledgeEnvironmentMonitor

Class	<code>atg.svc.agent.environment.EnvironmentMonitor</code> <code>atg.svc.agent.environment.ServiceEnvironmentMonitor</code> <code>atg.svc.knowledge.environment.KnowledgeEnvironmentMonitor</code>
Component	<code>/atg/svc/agent/environment/ServiceEnvironmentMonitor</code> <code>/atg/svc/knowledge/environment/KnowledgeEnvironmentMonitor</code>

The `EnvironmentMonitor` abstract class provides the interface for writing application specific environment monitors. An application participates in the environment change process by implementing a component of this class and adding it to the `EnvironmentTool` configuration. The `ServiceEnvironmentMonitor`

component detects changes, generates warnings, and applies changes for Service managed objects. The `KnowledgeEnvironmentMonitor` component detects changes, generates warnings, and applies changes for Knowledge Manager objects.

## FormHandlers

Class	<code>atg.svc.agent.environment.EnvironmentChangeFormHandler</code> <code>atg.svc.agent.ui.formhandlers.ChangeActiveTicketFormHandler</code> <code>atg.svc.agent.ui.formhandlers.ChangeCurrentCustomerFormHandler</code> <code>atg.svc.agent.ui.formhandlers.DeferActiveTicketFormHandler</code> <code>atg.svc.agent.ui.formhandlers.WorkTicketFormHandler</code>
Component	<code>/atg/svc/agent/ui/formhandlers/ChangeCurrentCustomer</code> <code>/atg/svc/agent/ui/formhandlers/CloseTicket</code> <code>/atg/svc/agent/ui/formhandlers/CreateNewTicket</code> <code>/atg/svc/agent/ui/formhandlers/DeferTicket</code> <code>/atg/svc/agent/ui/formhandlers/EndAndStartCall</code> <code>/atg/svc/agent/ui/formhandlers/EndCall</code> <code>/atg/svc/agent/ui/formhandlers/EscalateTicket</code> <code>/atg/svc/agent/ui/formhandlers/ReassignTicket</code> <code>/atg/svc/agent/ui/formhandlers/ReleaseTicket</code> <code>/atg/svc/agent/ui/formhandlers/SendToGroup</code> <code>/atg/svc/agent/ui/formhandlers/StartNewCall</code> <code>/atg/svc/agent/ui/formhandlers/WorkActiveTicket</code> <code>/atg/svc/agent/ui/formhandlers/WorkTicket</code>

The `EnvironmentChangeFormHandler` is the base form handler class for agent gestures that perform environment changes. It is designed to provide a specific flow when the agent users gestures that change the environment.

This flow consists of starting a change with the agent gesture and progressing to warnings and ticket disposition confirmations, to performing the change.

Changes in the environment are monitored by all applications, which can apply their own specific changes. For example, when a change is set to occur, the application might generate a warning that must be confirmed by an agent before the changes can be completed. If the change includes a ticket modification, the agent may also be asked to decide the disposition of the current ticket before proceeding.

When a ticket disposition change occurs, the agent is presented with a form that allows them to set the disposition options. The current ticket disposition is modified based on the ticket disposition options, which are supplied either by the agent, or through a set of default options. Whenever the ticket changes as a result of an environment change, the current ticket disposition will be modified based upon these options.

This `EnvironmentChangeFormHandler` contains the following properties:

- `initChangeState` – Determines if the environment change state is initialized. Default is `true`
- `environmentChangeState` – Contains the state information for the change. This property should be configured to a window scoped `EnvironmentChangeState` object
- `environmentChangeKey` – Identifies the type of environment change being requested
- `inputParameters` – A map of change input parameters

- `doWarnings` – Determines if warnings will be generated and shown to the agent
- `doDispositionPrompt` – Determines if the agent should be prompted with ticket disposition options when the current ticket is changing as a result of the requested change. Default is `true`. **Note:** This property should be set to `false` on the confirmation page
- `confirmURL` – The URL that launches the warnings/ticket disposition prompt
- `confirmPromptURL` – The URL that defines the contents of the prompt window for warnings/ticket disposition options

## EnvironmentStateChange

Class	<code>atg.svc.agent.environment.EnvironmentChangeState</code>
Component	<code>/atg/svc/agent/environment/EnvironmentChangeState</code>

This class represents the state object used to perform environment changes. It contains the change key, input parameters, change details, ticket disposition options and other information related to a change. See the Java doc for more details. `EnvironmentTools` contains the API for initializing an `EnvironmentChangeState` instance for a specific change. The state object is then used as input to other API used to execute the change.

## ServiceEnvironmentConstants

Class	<code>atg.svc.agent.environment.ServiceEnvironmentConstants</code>
-------	--

This static class exposes the environment change keys defined by Service. Change keys are string values that identify a specific type of change to the system. `startNewCall`, `changeActiveCustomer` and `newTicket` are examples of change keys defined by the Service framework.

This class also exposes the input parameter names for each change key. `profileId` is an example of an input parameter name required to execute a change using the `changeActiveCustomer` change key.

## TicketDispositionOptions

Class	<code>atg.svc.agent.environment.TicketDispositionOptions</code>
-------	---

An instance of this class defines the desired disposition of the current ticket, if it is replaced because of the change. It exposes the names of each disposition option and the input parameters required for each one. Example options are `save`, `close`, `escalate` and `defer`. If the ticket disposition object is not provided for a change, the default behavior will use the `save` option.

Refer to the *ATG Commerce Service Center Installation and Programming Guide* for information on Oracle ATG Web Commerce Service Center ticket dispositions.



---

# 4 Customizing Ticketing

ATG Ticketing is delivered with pre-configured user interface properties. ATG Ticketing can be modified according to your organization's needs. This chapter, which is intended for administrators and developers of Service Center, provides lists of delivered properties and instructions on how to modify them using the ACC.

## Defining Global Context Area Defaults

The global context area provides a quick view of current active tickets (Active Tickets), ticket activities (Ticket), and customer profile information (Customer). The global context area is always displayed as the top panel in Service Center.

For additional information and further detail on working with the global context area, refer to the *ATG Service Center UI Programming Guide*.

The following properties control the global context area defaults:

Global Context Area Property/Default Value	Description
<code>initialTab=activeTicketsMainPanel</code>	Set the initial page to display for the global context area.
<code>ticketSortProperty</code>	Sort tickets by identification number.
<code>ticketSortDirection=ascending</code>	Sort tickets by identification number in ascending order (1, 2, etc.).
<code>activitiesSortProperty=creationTime</code>	Sort ticket activities by activity creation time.
<code>activitiesSortDirection=descending</code>	Sort activities in descending order (most recent first).
<code>expandTopActivity=false</code>	Do not automatically expand the first activity in the activities table.

Global Context Area Property/Default Value	Description
<code>onlyExpandThese=inboundMessageActivity</code>	Auto-expand activity type.  <b>Note:</b> Leave blank to expand any activity that defaults as the first activity in the activity list (if <code>expandTopActivity=true</code> ).

To access the global context area default properties:

1. From the ACC menu, select Pages and Components > Components by Path. The Components page is displayed.
2. From the Components page, expand the `atg > svc > agent > ticketing` folder, and then double-click the `GlobalPanelConfiguration` file. The Global Panel Configuration Component Editor is displayed.

**Note:** The global context area configuration files are located in the `GlobalPanelConfiguration` file.

## Configuring Ticket Reason Codes and Contexts

To identify, differentiate, and/or track certain ticket actions and status changes, ATG Ticketing requires reason codes in certain instances. Reason codes are available in drop-down lists based on the context of an action taken while working with ATG Ticketing in Service Center.

- Reason Contexts

Reason Contexts are set in the Ticketing Repository to control reason code lists. With the exception of adding and removing reasons to the Reason Contexts, do not modify the Reason Context. Reason Context keys are fixed attributes in the user interface and any modifications will require additional changes to the JSP.

- Reason Codes

The reason codes available in drop-down lists in Service Center are based on ticket actions or status changes. Available Reason Code selection is based on the Reason Code to Reason Context relationship set in the ACC.

ATG Ticketing is delivered with the following Reason Codes and Reason Contexts:

Reason Context	Ticketing Action	Reason Code(s)
<code>Ticketing.EscalatePrompt</code>	Escalate Ticket	Needs Manager Approval Need Help
<code>Ticketing.ClosePrompt</code>	Close Ticket	Problem Resolved Confirmed Error Spam Closed by Customer

Reason Context	Ticketing Action	Reason Code(s)
<code>Ticketing.ReleasePrompt</code>	Release Ticket	Need Help Too Busy
<code>Ticketing.DeferForLaterPrompt</code>	Defer Ticket	Need Help Too Busy Waiting
<code>Ticketing.SendToGroupPrompt</code>	Send to Group	Need Help Too Busy
<code>Ticketing.ReassignPrompt</code>	Reassign Ticket	Need Help
<code>Ticketing.PhoneCallPrompt</code>	Phone Call	Need Help

For example, while working on a ticket in Service Center, the agent/user decides to close a ticket. The user is prompted to select a Reason Code in the Close Ticket pop-up window (`CloseTicketPrompt` reason context). The list of reason codes to select includes those reason codes added to the Close Ticket reason context in ACC.

## Modifying a Reason Code

To modify an existing reason code:

1. From the ACC menu, select Content > Ticketing Repository.
2. From the `TicketingRepository` page, select Items of Type Reason, and then click List. The list of available Reason Codes is displayed.
3. Select a reason code from the available list. The Reason Context details are displayed in the right pane.
4. Modify the Reason Description and the Name as necessary, and then click Save.

## Adding a New Reason Code

To add a new reason code:

1. From the ACC menu, select Content > Ticketing Repository.
2. From the `TicketingRepository` page, select Items of Type Reason, and then click List. The list of available Reason Codes is displayed.
3. Click New Item. The New Item window is displayed.
4. In the New Item window, type a Description and a Name for the new reason code, and then click OK. The Ticketing Repository page is redisplayed.
5. Click Save.
6. From the `TicketingRepository` page, select Items of Type ReasonContext, and then click List. The list of available Reason Contexts is displayed.

---

**Note:** With the exception of adding and removing reason codes within your customization layer, do not modify Reason Contexts. Reason Context keys are fixed attributes in the user interface and any modifications require additional changes to the JSP.

7. Click the name of the reason context you want to associate the new reason code with.

For example, if you are adding a new reason code named NeedsMoreInfo (to indicate that the agent or user needs time to gather more information in order to continue working on the ticket), you would associate this reason code with the Reason Context: DeferforLaterPrompt. In this case, you would click Reason Context: DeferforLaterPrompt from the list of available reason contexts.

8. From the DeferforLaterPrompt pane, click the Reasons box, and then click the ellipsis button (...). The Reasons window is displayed. The Reasons window contains a list of reason codes that are currently included with the selected Reason Context.
9. From the Reasons window, click Add. The New Item window is displayed.
10. From the New Item window, click List. A list of available reason codes is displayed.
11. Click the name of the reason code you want to add the reason context, and then click OK. The reason context pane is redisplayed with the newly added reason code included in the Reasons list.
12. Click Save.

**Note:** Reason codes are cached at application startup. You must re-assemble, redeploy, and restart the Web application that includes ATG Reporting after modifications are complete in order to see them in Service Center.

## Indicating Ticket Status/Sub-Status

The Ticket Status indicates the current condition of a ticket (such as Closed, Closed as Duplicate, Open, Pending) in Service Center. There are three parent statuses and related sub-statuses delivered with ATG Ticketing.

**Note:** Do not modify parent statuses.

Parent Status	Sub-Status	Description
Open	Open	Ticket is open.
	ReOpened	The ticket has been re-opened after previously being closed.
	Pending	The ticket is suspended, awaiting the occurrence of an event. The event may be date/time oriented, in which case it would be triggered by the Pending Date/Time property. If the event is manual, it will be triggered by the agent/user.
Closed	Closed	The ticket has been closed.
	ClosedAsDuplicate	The ticket has been identified as a duplicate of another ticket and closed as a result.



Parent Status	Sub-Status	Description
	ConfirmedClosed	The ticket has been closed at the request of a customer.
	Restored	The ticket has been restored from archive.
Archived	ArchivePending	The ticket has been partially archived and therefore only summary information is available and not the activities. If the activities are required, a restore will be necessary.

## Modifying Ticket Sub-Statuses

To modify an existing ticket sub-status:

1. From the ACC menu, select Content > Ticketing Repository.
2. From the `TicketingRepository.properties` page, select Items of type Substatus, and then click List. The list of available Sub-statuses is displayed.
3. Select a sub-status from the available list, and then modify the Name as necessary. Each sub-status lists its related parent status.
4. Click Save.

Next, you must modify the sub-status name in the `TicketingResources.properties` file, located in:

```
j2ee-apps/Agent.ear/Agent.war/WEB-INF/classes/atg/svc/agent/ticketing/TicketingResources.properties
```

5. From the ACC menu, select Pages and Components > J2EE Pages.
6. From the J2EE page, double-click `j2ee-apps/Agent.ear` to open the `Agent.war` page.
7. From the `Agent.war` page, locate the `WEB-INF/classes/atg/svc/agent/ticketing` folder, and then double click the `TicketingResources.properties` file to open the `TicketingResources.properties` window.
8. From the `TicketingResources.properties` window, scroll to the # Status labels list.
9. Modify the relevant #Status label(s).
10. Click Save File, and then close the `TicketingResources.properties` window.
11. From the ACC menu, select Pages and Components > Components by Path.
12. Navigate to the `/atg/ticketing/TicketStatusManager` component and then modify the relevant properties to match the new sub-status names. Included properties are:

```
archivedSubStatusName
closedAsDuplicateSubStatusName
closedSubStatusName
openSubStatusName
pendingSubStatusName
reOpenedSubStatusName
restoredSubStatusName
confirmedClosedSubStatusName
```

---

**Important:** If you have modified the `Open` sub-status name, then you must also modify the `newTicketSubStatus` and `unsuspendedTicketSubStatus` properties to match the new name for the `Open` sub-status.

13. Click Save.

## Modifying Ticket Escalation

Escalate is an attribute on the ticket, *not* a ticket status. Escalating a ticket allows a ticket to maintain its status, but reflect that the ticket has been escalated for further research, help, or approval, based on your organization's escalation level definitions. Three escalation levels are delivered with ATG Ticketing

- Tier 1
- Tier 2
- Tier 3

You can use the escalation levels provided, or modify them according to your business needs.

### Modifying New Ticket Escalation Levels

Modify the new ticket escalation property in the `TicketingManager.properties` file (`newTicketEscalationLevel` is set to `Tier1`). For example, instead of Tier 1 as the escalation level for a newly created ticket, you want to the new ticket escalation level to be Agent, or Level 1.

To change the new ticket escalation level:

1. From the ACC menu, select Pages and Components > Components by Path. The Components page is displayed.
2. From the Components page, expand the `atg > ticketing` folder, and then double-click the `TicketingManager` file. The TicketingManager Component Editor is displayed.
3. From the TicketingManager Component Editor, scroll to the `newTicketEscalationLevel` property.
4. Modify the `newTicketEscalationLevel` property as required, and then click Save.

### Modifying Default Escalation Ticket Queue Names

Escalate a ticket to a default ticket queue, first using the designated ticket queue for the ticket (if any), then using the ticket queue specified by the `defaultEscalationTicketQueueName` property. This creates the associated activities for escalation level changes and ticket queue ownership changes.

To modify the `defaultEscalationTicketQueueName`:

1. From the ACC menu, select Pages and Components > Components by Path. The Components page is displayed.
2. From the Components page, expand the `atg > ticketing` folder, and then double-click the `TicketingManager` file. The TicketingManager Component Editor is displayed.
3. From the TicketingManager Component Editor, scroll to the `defaultEscalationTicketQueueName` property.

- 
4. Type the group name for escalation as required, and then click Save.

## Modifying Default Escalated Ticket Escalation Levels

Designate a default escalation level for an escalated ticket using the `defaultEscalatedTicketEscalationLevel` property. The default escalated ticket escalation level is the escalation level displayed with a ticket after it has been escalated. For example, if your default new ticket escalation level is set at Tier 1, the logical default for the escalated ticket escalation level is Tier 2.

To modify the `defaultEscalatedTicketEscalationLevel`:

1. From the ACC menu, select Pages and Components > Components by Path. The Components page is displayed.
2. From the Components page, expand the `atg > ticketing` folder, and then double-click the `TicketingManager` file. The TicketingManager Component Editor is displayed.
3. From the TicketingManager Component Editor, scroll to the `defaultEscalatedTicketEscalationLevel` property.
4. Type the new escalated ticket escalation level as required, and then click Save.

## Setting Default New Ticket Priority

The default ticket priority for a new ticket created in Service Center is 0. The `newTicketPriority` value is set in the `TicketingManager.properties` file in the ACC.

To change the default priority for new tickets:

1. From the ACC menu, select Pages and Components > Components by Path. The Components page is displayed.
2. From the Components page, expand the `atg > ticketing` folder, and then double-click the `TicketingManager` file. The TicketingManager Component Editor is displayed.
3. From the TicketingManager Component Editor, scroll to the `newTicketPriority` property.
4. In the `newTicketPriority` property, change the priority number as required, and then click Save.

## Generating Ticket ID Spaces

The Ticketing repository is configured to use an ID generator service to generate unique IDs for ticket items. By default, the ticket ID space is configured to have a seed of 1000 and a batch size of 100.

### Modifying the ID Generator

In order to modify the seed, batch size, prefix or suffix information open the `das_id_generator` database table:

1. Select the row in the `das_id_generator` table with an `id_space_name` column value of `ticket`.

- 
2. Modify the other values in that row as required.

**Note:** Refer to the *ATG Platform Programming Guide* for more information on the ID Generator.

## Defining New Ticket Activity Types

You can customize ATG Ticketing to track new ticket activities, allowing agents to search and sort tickets based on activity type. To create a new ticket activity type you must define the ticket activity, define the new repository item definitions and then display the ticket activities in Service Center.

1. Add the necessary SQL tables used for saving the custom activity information.

```
create table csrt_loyalty(  
  idvarchar(40)not null,  
  order_idvarchar(40)not null,  
  pointsRedeemedinteger not null,  
  , primary key (id));  
alter table csrt_loyalty set pessimistic;
```

2. Add the repository item definitions to the `TicketingRepository`. For example,

```
//Add the item descriptor  
<item-descriptor name="RedeemedLoyaltyPoints" super-type="ticketActivity"  
  sub-type-value="RedeemedLoyaltyPoints" cache-mode="simple">  
  <attribute name="resourceBundle"  
    value="my.app.RepositoryTemplateResources"/>  
  <table name="csrt_loyalty" id-column-name="id">  
    <property name="pointsRedeemed" data-type="int" column-  
      name="points_redeemed" display-name-resource="pointsRedeemed"/>  
    <property name="orderId" data-type="string" column-name="order_id"  
      display-name-resource="orderId"/>  
  </table>  
</item-descriptor>  
//Add the activity type and application name to the base item descriptor  
<item-descriptor name="ticketActivity" sub-type-property="type">  
  <table name="tkt_activity" type="primary" id-column-name="activity_id">  
    <property name="type" data-type="enumerated" column-name="type">  
      <attribute name="propertySortPriority" value="20"/>  
      <attribute name="useCodeForValue" value="false"/>  
      <option value="RedeemedLoyaltyPoints" code="88001"/>  
    </property>  
    <property name="application" data-type="enumerated" column-  
      name="application" required="true">  
      <attribute name="propertySortPriority" value="30"/>  
      <attribute name="useCodeForValue" value="false"/>  
      <option value="MyAppName" code="88000"/>  
    </property>  
  </table>  
</item-descriptor>
```

3. Use the `TicketingManager` API to create and add new ticket activities to a ticket.

---

```

public void someMethod(...)
{
    activity = ticketingManager.createActivity("RedeemedLoyaltyPoints", "My
App Name", agentProfileRef,"My reason");
    ... set properties of item
    ticketingManager.addTicketActivity(ticketRef, agentProfileRef, activity);
}

```

## Configuring Ticket Activities in Service Center

Service Center displays a panel that shows all the ticket activities associated with a specific ticket. The following steps describe how to add a new activity to that display.

1. Configure a new `ActivityInfo` component for the activity and add it to the registry configuration layer located in the `/atg/ticketing/activities` directory. **Note:** The name of the file must match the type of the ticket activity.

`ActivityInfos` define how to display the information contained in the activity. For example, using the `/atg/ticketing/activities/RedeemedLoyaltyPoints.properties` file:

```

$class=atg.svc.ui.activity.ActivityInfo
hidden=true
# JSP to render the Activity column
activityColRenderer^=/atg/ticketing/activities/default.activityColRenderer
# The property to display in the Activity column
activityPropertyName=heading
# The page to use to render detail information for the activity
detailPage^=/atg/ticketing/activities/default.detailPage
options=detailPageProperties=orderId,,pointsRedeemed
# The icon to use to indicate an inbound or outbound activity
# directionIcon=
# The value to use for activity display name if no resourced display name
# value is found
# displayName=
# The resource key for the display name in the resource bundle
displayNameResourceKey=redeemedLoyaltyPointsDisplayName
# The resource bundle
resourceBundleName=atg.commerce.csr.ticketing.ActivityInfoResources
# The JSP to render the source column
sourceColRenderer^=/atg/ticketing/activities/default.sourceColRenderer
# The icon to use when rendering the source column
# sourceIcon=
# The property to display in the Source column
sourcePropertyName=agentProfile.firstName,agentProfile.lastName
# Renderer for the type column
typeColRenderer^=/atg/ticketing/activities/default.typeColRenderer
# The icon used to represent this activity type
# typeIcon=

```

2. The activities panel allows the agent to filter the display to a specific category of activities. For example, the agent can filter the display to view only Oracle ATG Web Commerce related activities. To create a custom filter by creating a filter configuration component, for example, `/myapp/activities/MyAppFilter`:

```

$class=atg.svc.ui.formhandlers.CategoryActivityFilter
$scope=request
# The activity types to be grouped under this category
activityTypes=RedeemedLoyaltyPoints,MyOtherActivity1,MyOtherActivity2
# The resource key of the display name for this group
displayNameResourceKey=MyAppActivityFilter
# The resource bundle that contains the resource key
resourceBundleName=myApp.activities.ActivityInfoResources

```

3. Add the new filter component to the `/atg/svc/ui/formhandlers/ActivityFilters` configuration. For example:

```
customActivityFilters+=/myapp/activities/MyAppFilter
```

## Configuring Commerce Service Center-Specific Ticket Activities

Because many of the actions taken by an agent in Commerce Service Center are captured in the agent audit log, as well as ticket activities, Commerce Service Center provides a convenient way of creating a ticket activity from an `AgentEvent`.

The process mirrors that of recording an audit event whereby an `AgentEvent` is routed to a recorder component, which saves the information in the repository. The recorders are mapped by the activity type. Commerce Service Center provides classes for the most common cases of creating activities from the events.

The following steps outline what is needed to record an `AgentEvent` as a ticket activity. This assumes that the `AgentEvent` and audit log repository definitions are already in place.

1. Define the new activity type in the `TicketingRepository`. You can define the ticket activity much the same as the audit log definition for the same type. However, the ticket activity definition can be defined as needed to meet your requirements. However, the only source for the ticket activity information is the `AgentEvent`. For additional information, refer to the *ATG Service Installation and Configuration Guide*.
2. Create the recorder components. The recorder component generates a ticket activity from an `AgentEvent`. Commerce Service Center provides two classes for the most common cases, the `atg.commerce.csr.ticketing.TicketingActivityRecorder` class and the `TicketingPropertyUpdateRecorder` class.

The `TicketingActivityRecorder` class is the base class for a recorder and supports the following features:

- Automatic creation of the ticket activity repository item based on the type contained in the `AgentEvent`
- The ability to configure a list of event properties that map to ticket activity properties. The recorder automatically sets the values in the activity from those in the `AgentEvent`
- Automatic addition of the activity to the ticket ID referenced in the `AgentEvent`
- Automatic association of the order with the ticket. (Note that this only occurs when the `AgentEvent` contains an `orderId` property)
- The ability to configure if the order related ticket activity should be added when the order is in a transient state
- Automatic saving of the ticket after adding the activity

The `TicketingPropertyUpdateRecorder` class is an extension of `TicketingActivityRecorder` that supports recording an `AgentEvent` that contains a `List` or `PropertyUpdates`. For example:

---

```
/myapp/recorders/LoyaltyPointRecorder
class=atg.commerce.csr.ticketing.TicketingActivityRecorder
applicationName=MyApplicationName
internalProfileRepository=/atg/userprofiling/InternalProfileRepository
orderRepository=/atg/commerce/order/OrderRepository
profileRepository=/atg/userprofiling/ProfileAdapterRepository
ticketingManager=/atg/ticketing/TicketingManager
customProperties=\
pointsRedeemed=pointsRedeemed,\
orderId=orderId
CSRAgentTools=/atg/commerce/custsvc/util/CSRAgentTools
ordersPropertyName=orders
saveTransientOrderActivities=false
```

3. Register the recorder component by activity type. Map the new recorder component by its activity type so an `AgentEvent` of the same type will be routed to it for processing. For example:

```
/atg/commerce/custsvc/ticketing/TicketingEventListener.properties#13
$$Change: 447205 $
eventTypeToRecorderMap+=\
RedeemedLoyaltyPoints=/myapp/recorders/LoyaltyPointRecorder
```

## Configuring Scheduled Services

The following scheduled services are available within the Ticketing module:

### Expire Outbound Message Service

The `ExpireOutboundMessage` service looks for and expires outbound message activities where the activity `dueTime` is past the current time. By default, this scheduled service is set to run once every hour.

To modify the schedule property of this service:

1. From the ACC menu, select Pages and Components > Components by Path. The Components page is displayed.
2. From the Components page, expand the `atg > ticketing > scheduled` folder, and then double-click the `ExpireOutboundMessageService` file. The `ExpireOutboundMessageService` Component Editor is displayed.
3. From the `ExpireOutboundMessageService` Component Editor, scroll to the `schedule` property.
4. Modify the schedule as required, and then click Save.

**Note:** Refer to the *ATG Platform Programming Guide* for more information about scheduled services.

### Release Ticket Periodic Service

The `ReleaseTicketPeriodic` service releases tickets according to the ticket due time. By default, this scheduled service is set to run once every minute.

---

To modify the schedule property of this service:

1. From the ACC menu, select Pages and Components > Components by Path. The Components page is displayed.
2. From the Components page, expand the `atg > ticketing > scheduled` folder, and then double-click the `ReleaseTicketPeriodicService` file. The `ReleaseTicketPeriodicService` Component Editor is displayed.
3. From the `ReleaseTicketPeriodicService` Component Editor, scroll to the `schedule` property.
4. Modify the schedule as required, and then click Save.

**Note:** Refer to the *ATG Platform Programming Guide* for more information on scheduled services.

## Unsuspend Ticket Periodic Service

The `UnsuspendTicketPeriodic` service releases tickets according to the ticket due time. By default, this scheduled service is set to run once every minute.

To modify the schedule property of this service:

1. From the ACC menu, select Pages and Components > Components by Path. The Components page is displayed.
2. From the Components page, expand the `atg > ticketing > scheduled` folder, and then double-click the `UnsuspendTicketPeriodicService` file. The `UnsuspendTicketPeriodicService` Component Editor is displayed.
3. From the `UnsuspendTicketPeriodicService` Component Editor, scroll to the `schedule` property.
4. Modify the schedule as required, and then click Save.

**Note:** Refer to the *ATG Platform Programming Guide* for more information on scheduled services.



---

# 5 Working with Tickets

This section provides an overview of ATG Ticketing for agents and other user of Service Center.

## Global Context Area

The global context area of Service Center provides a quick view of current active tickets, ticket activities, and customer profile information. The global context area is always displayed as the top panel in Service Center. The options available in the global context area change depending on the applications that you have installed.

## Ticketing Panels

Ticketing uses side panels that provide additional navigation tools to other information available within Service Center.

**Note:** Side panels displayed will vary depending on the applications currently in use with ATG Ticketing.

### Next Steps Side Panel

The Next Steps panel provides a menu of potential next step actions while working on a ticket, a customer profile, or ticket tasks. Next Steps items displayed in the Next Steps panel will vary depending on the current working state of the ticket, task, or customer profile.

For example, if you are not working on a ticket on the Tickets page, you will see next step actions including Create New Ticket and Work on Ticket. If you choose to create a new ticket, additional next steps become available in the Next Steps panel such as Save Ticket, Close Ticket, and Defer Ticket.

### Helper Side Panels

Helper panels are displayed in the right pane below the Next Steps panel in Service Center. These panels include information that may be useful while navigating through Service Center.

**Note:** Helper panels can be minimized to show only the panel heading (by clicking the minimize icon) , or removed from view (by clicking the close icon). Panels that are removed from view are stored and listed in Available Panels for later use. You can restore removed panels by clicking the panel title in Available Panels.

---

## Working with My Tickets

The My Tickets panel provides a list of currently open and assigned tickets. You can view and work on tickets currently assigned to you from the My Tickets panel on the Tickets page.

**Note:** If using Knowledge Manager, the Solution Queue is also available on the Tickets page.

To work on a ticket:

1. Click on the Ticket button. The My Tickets page opens.
2. From the My Tickets list, locate the ticket you want to work on, and then click the ticket identification number. The Ticket Details pane is displayed.
3. From the Ticket Details pane, click Work on Ticket in the Next Steps panel, and then continue with customer or ticket summary modifications as necessary.

## Working with Active Tickets

Active Tickets displays the current assigned and active tickets. Any ticket that is open, assigned to the current user, and is currently being worked on will be displayed as an active ticket in the active tickets list.

**Note:** A ticket is defined as being worked on when a user has chosen the Work Ticket Next Step, or when the ticket has been automatically pushed to the user.

### Viewing Active Tickets

To display the Active Tickets list in the global context area:

1. From the global context area, use the Ticket button drop down Active Tickets menu option. The Active Tickets list appears.
2. Click a ticket identification number in the Active Tickets list.
3. Click the ticket identification number in the global context area to display the Ticket Details pane.
4. The Ticket Details pane is displayed in the Tickets page.

### Adding a Ticket Note

To add a note to the current working ticket:

1. Click the Add Note button in the call section of the global context area. The Enter Note pop-up window is displayed.
2. In the Enter Note pop-up window, select the Share with Customer check box to make Ticket Notes available to external customers. Selecting the Share with Customer check box makes the note public and available to customers using your Self Service site.

- 
3. Type a note related to the ticket in the Enter Note text box, and then click OK. Ticket notes are available to view from the Ticket Details pane's Ticket Summary panel.

**Note:** Ticket notes are recorded as ticket activities and are available to view from the global context area, the Ticket Activity panel, and the Ticket Notes section of the Ticket Summary panel.

## Adding a Call Activity Note

To add a call activity note to the current ticket:

1. Click the Add Call Note button in the global context area. The Add Call Note pop-up window is displayed.
2. Select or clear the Inbound Call check box. Selecting the Inbound Call check box marks the call note type as an inbound telephone call activity in the Ticket Activity list. Clearing the Inbound Call check box will mark the call note type as an outbound telephone call activity in the Ticket Activity list.
3. Select the Share with Customer check box to make call activity note information available to external customers. Selecting the Share with Customer check box makes the note public and available to customers using your Self Service site.
4. Type call activity information in the Enter Note text box, and then click OK. Call notes are recorded as ticket activities available to view from the global context area, the Ticket Activity panel, and the Ticket Notes section of the Ticket Summary panel.

## Searching for Tickets

Search for tickets using ticket attributes using:

- Quick Search
- Advanced Search

### Ticket Quick Search

To search for an existing ticket using a ticket ID:

1. Click the Tickets button search icon. The Ticket Search pane is displayed.

Type the ticket ID in the Quick Search text box, and then click Find. The ticket search results are displayed in the Search Results panel.

2. From the Search Results panel, you can:
  - Click the Ticket ID number to open the Ticket Details pane in read-only view, or click the Work on Ticket icon to open the Ticket Details pane in edit view
  - Expand Customer Information to view customer profile information related to the ticket
  - Expand Customer Information In Ticket to view contact information stored within the ticket

- 
- Expand Associated Tickets to view and/or work on associated tickets (click an associated Ticket ID number to open the Ticket Details pane in read-only view, or click the associated ticket Work on Ticket icon to open the Ticket Details pane in edit view)
3. Continue with Next Steps. See [Working on a Ticket \(page 34\)](#).

or

To return to Ticket Search, click Back to Ticket Search in the Next Steps panel.

## Ticket Advanced Search

To search for tickets using advanced search attributes:

1. Click the Tickets search icon. The Ticket Search pane is displayed.
2. Type and/or select advanced ticket attributes for your search, and then click Find. The ticket search results are displayed in the ticket Search Results panel. Advanced ticket search attributes include:

- Status
- Group
- First Name, Last Name
- Email
- Escalation Level
- Created Date
- Last Modified Date

You must select at least one Advanced Search attribute to perform an advanced ticket search. Searching using a ticket ID (Quick Search) will override any other search criteria entered in the Advanced Search panel.

**Note:** Customer information searched using advanced ticket search options is based on customer information stored within an individual ticket only. This information is not related to customer profile information stored in the ATG customer repository. See [Searching for Customers \(page 39\)](#) for more information about searching using customer profile information.

3. From the Ticket Search Results panel, you can:
  - Click the Ticket ID number to open the Ticket Details pane in read-only view, or click the Work on Ticket icon to open the Ticket Details pane in edit view
  - Expand Customer Information to view customer profile information related to the ticket
  - Expand Customer Information In Ticket to view contact information stored within the ticket
  - Expand Associated Tickets to view and/or work on associated tickets. Click an associated Ticket ID number to open the Ticket Details pane in read-only view, or click the associated ticket Work on Ticket icon to open the Ticket Details pane in edit view
4. Continue with Next Steps. See [Working on a Ticket \(page 34\)](#).

or

---

To return to Ticket Search, click Back to Ticket Search in the Next Steps panel.

## Creating a New Ticket

To create a new ticket:

1. Click the Ticket button and select the Create New Ticket from the drop down menu.
2. The Ticket Details pane is displayed. The Ticket Details pane contains customer, ticket summary, and ticket activity information.
3. Complete the information in the Ticket Summary panel as required, including:
  - Ticket Description
  - Customer Information (in Ticket)
  - Priority

**Note:** Customer information modified and stored within the Ticket Summary is applicable to the individual ticket only (Customer Information In Ticket). This information is not related to customer profile information stored in the ATG customer repository and cannot be used for a customer search.

4. Click Save Changes in the Ticket Summary panel to save the ticket and summary information. The Ticket Summary information is saved, a ticket identification number is created, and the Ticket Summary is redisplayed in read-only view. To edit the Ticket Summary, click Edit Ticket in the Ticket Summary panel.
5. To associate the new ticket with an existing ticket, click the Associate Ticket button in the Ticket Summary panel. See [Associating a Ticket \(page 34\)](#). You can view the list of associated tickets by expanding the Associated Tickets section of the Ticket Summary panel.
6. To close the ticket as a duplicate of an existing ticket, click Close as Duplicate Ticket in the Ticket Summary panel. See [Closing a Ticket as a Duplicate \(page 34\)](#).
7. To add notes to the ticket, expand the Ticket Notes section of the Ticket Summary panel. Type notes and information related to the ticket in the Ticket Notes box.
8. Select or clear the Share with Customer check box and then click Add. Selecting the Share with Customer check box makes the note public and available to customers using your Self Service site. You can view Ticket Notes by expanding the Ticket Notes section of the Ticket Summary panel.
9. From the Ticket Details Customer Information panel, you can either link an existing customer profile with the new ticket, or create a new customer profile. See [Linking a Customer to a Ticket \(page 40\)](#).

**Note:** You are not required to link customer profile information to a ticket. However, customer profile information contains e-mail and login information required for creating customer password information for use on your Self Service site.

10. Continue with Next Steps. You must select a Next Step to clear the current ticket from Service Center and continue working with ATG Ticketing, or select another ticket from the Active Tickets list to change the current ticket view. To work using multiple tickets and multiple ticket windows, see [Working with Multiple Tickets/Windows \(page 38\)](#).

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## Working on a Ticket

To modify an existing ticket:

1. Search for an existing ticket, or select a ticket from the Active Tickets list.
2. If necessary, from the Ticket Details pane, click Work on Ticket in the Next Steps panel.  
**Note:** If the ticket is already assigned to you and available in the Active Tickets list, clicking Work on Ticket may not be required.
3. From the Ticket Summary panel, click Edit Ticket to modify the Ticket Summary information.
4. From the Customer Information panel, click Edit Customer to modify customer profile information. The Customer Management Customer Information panel is displayed. From here you can edit customer profile information, and change the customer password as necessary.
5. Continue with Next Steps, or select another ticket from the Active Tickets list.

## Associating a Ticket

An associated ticket is a ticket that is related to another ticket. You can associate multiple tickets to one ticket, or one ticket to multiple tickets.

**Note:** By default, the list of Associated Tickets contained within the Customer Results panel only displays the two most recent associated tickets. Click the customer name to view the customer profile and view all of the tickets for the customer in the Ticket History list.

To associate a ticket with another ticket:

1. From a working ticket, click Associate Ticket in the Ticket Summary panel. The Associate Ticket pop-up window is displayed.
2. Type the identification number of the ticket you want to associate with the working ticket, and then click OK. The Associated Tickets list is updated in the Ticket Summary panel. Expand the Associate Tickets panel to view the associated ticket list.

## Linking a Ticket to a Solution

Solutions that you have written and saved using the Contribute page can be linked and/or unlinked to tickets by clicking Link Solution in Next Steps.

To link a ticket to a solution:

1. Create a new solution by clicking the Contribute button, or open an existing solution.
2. From the Next Steps panel, select Link to Current Ticket.

The solution is linked to the current ticket. Linked solutions are displayed as activities in the Ticket Activity panel. When viewing a solution from the Research page, you can also view a list of any associated tickets from the Associated Tickets panel.

## Closing a Ticket as a Duplicate

To close a ticket as a duplicate of an existing ticket:

- 
1. From a working ticket, click Close as Duplicate Ticket in the Ticket Summary panel.

The Close as Duplicate pop-up window is displayed.

2. Type the identification number of the duplicated ticket in the Duplicate Of box, and then click OK. The ticket status is changed to *Closed*(*Closed as Duplicate*) and the ticket ownership is released. The Ticket Details pane is redisplayed.

**Note:** You can reopen a ticket after it has been closed by clicking Reopen Ticket in the Next Steps panel.

The Next Steps panel provides a menu of potential next step actions while working with a ticket, a customer profile, or ticket tasks. Next Steps items displayed in the Next Steps panel vary depending on the current Service Center and/or by the current state of the ticket or customer profile.

## Closing a Ticket

To close a ticket:

1. From a working ticket, click Close Ticket in the Next Steps panel. The Close Ticket pop-up window is displayed.
2. In the Reason Code drop-down list, select a reason for closing the ticket. Reason Codes include:

- Problem Resolved
- Confirmed
- Error
- Closed by Customer

**Note:** To close a ticket as a duplicate of an existing ticket, use Close as Duplicate Ticket in the Ticket Summary. You will be prompted to enter the identification number of the duplicate ticket for future reference. The duplicate ticket ID will later be displayed in the Ticket Activity Description in the Ticket Activity panel. See [Closing a Ticket as a Duplicate \(page 34\)](#) for additional information.

3. Type notes related to the ticket in the Enter Note box. Notes are helpful to other users after a ticket is closed to provide further explanation for the Close Ticket reason code.

Select the Share with Customer check box to make the note available to the customer. Selecting the Share with Customer check box makes the note public and will be visible to customers using your Self Service site.

4. Click OK. The ticket status is changed to *Closed* and the ticket ownership is released. The Ticket Details pane is redisplayed.

**Note:** You can reopen a ticket after it has been closed by clicking Reopen Ticket in the Next Steps panel.

## Deferring a Ticket

By deferring a ticket, you can release (or *defer*) your ticket task to a later date and/or time (for example; to allow time to further research a problem or issue), while retaining ownership of a ticket, or releasing the ticket to the owning group (ticket queue).

For example:

- 
- If you do not select a deferment date and retain ownership of the ticket, the ticket is returned to your ticket task list to work on at any time
  - If you do not select a date and *do not* Retain Ownership of the ticket, the ticket is released to the owning group (ticket queue) ticket task list to work on at any time
  - If you select a Date/Time and Retain Ownership of the ticket, the ticket is returned to your ticket task list to work on at the specified time and the ticket status is set to *Open (Pending)*
  - If you select a Date/Time and *do not* Retain Ownership, the ticket is released to the owning group (ticket queue) ticket task list to work on at the specified time and the ticket status set to *Pending*

## To Defer a Ticket

1. From a working ticket, click Defer Ticket in the Next Steps panel. The Defer Ticket pop-up window is displayed.
2. Type the date and/or time you want to defer to in the Defer Until box, or click the calendar icon to select a deferment date and time
3. Clear the Retain Ownership of Ticket check box if you do not want to the ticket to remain in your task list.
4. Select a reason for deferring the ticket from the Reason Code drop-down list.
5. Select the Share with Customer check box to make the note available to the customer. Selecting the Share with Customer check box makes the note public and will be visible to customers using your Self Service site.
6. Type a note related to the reason code in the Enter Note text box. Notes are helpful to other users after a ticket is deferred to provide further explanation for the Defer Ticket reason code.
7. Click OK. Depending on the selected Reason Code, the ticket status is changed to *Open (Pending)*.

## Escalating a Ticket

Escalate is an attribute on the ticket, *not* a ticket status. Escalating a ticket allows a ticket to maintain its status, but reflect that the ticket has been escalated for further research, help, or approval, based on your organization's escalation level definitions.

To escalate a ticket:

1. From a working ticket, click Escalate Ticket in the Next Steps panel. The Escalate Ticket pop-up window is displayed.
2. Select an escalation group from the Group drop-down list. The selected group is the group that will be marked for escalation work.
3. Select an escalation level from the New Escalation Level drop-down list.
4. Select a reason for the escalation from the Reason Code drop-down list.
5. Type notes related to the ticket in the Enter Note box. Notes are helpful to other users after a ticket is escalated to provide further explanation for the escalation reason code.

Select the Share with Customer check box to make the note available to the customer. Selecting the Share with Customer check box makes the note public and will be visible to customers using your Self Service site.



- 
6. Click OK. The ticket is reassigned to the selected escalation group, and the escalation level is updated in the Ticket Summary and recorded as an activity in the Ticket Activity panel.

## Printing a Ticket

To print a ticket, open the ticket and then click Print Ticket in the Next Steps panel.

## Reassigning a Ticket

To reassign a ticket:

1. From an open ticket, click Reassign Ticket in the Next Steps panel. The Assign Ticket to Agent pop-up window is displayed.
2. Select an agent/user name from the Agent drop-down list.
3. Select a reason for the reassignment from the Reason Code drop-down list.
4. Type notes related to the ticket in the Enter Note box. Notes are helpful to other users after a ticket is reassigned to provide further explanation for the reassignment reason code.

Select the Share with Customer check box to make the note available to the customer. Selecting the Share with Customer check box makes the note public and will be visible to customers using your Self Service site.

5. Click OK. The ticket ownership is reassigned to the selected agent/user, and the reassignment is recorded as an activity in the Ticket Activity panel.

## Releasing a Ticket

Release Ticket allows you to release individual ownership or a ticket assignment and send the ticket to the ticket owning group (ticket queue).

To release a ticket:

1. From a working ticket, click Release Ticket in the Next Steps panel. The release Ticket pop-up window is displayed.
2. Select reason for releasing the ticket from the Reason Code drop-down list.
3. Type notes related to the ticket in the Enter Note box. Notes are helpful to other users after a ticket is released to provide further explanation for the Release Ticket reason code.

Select the Share with Customer check box to make the note available to the customer. Selecting the Share with Customer check box makes the note public and will be visible to customers using your Self Service site.

4. Click OK. The ticket is released to the ticket group and removed from your ticket task list.

## Reopening a Ticket

Reopen a ticket after it has been closed by clicking Reopen Ticket from the closed ticket Next Steps panel.

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To reopen a ticket:

1. Search for the closed ticket, from the Tickets button select the search tickets icon and use the Ticket Search Advanced Search attributes.
2. From the results list, locate the closed ticket you want to reopen, and then click the identification number of the ticket to view the Ticket Details pane.
3. Click Reopen Ticket in the Next Steps panel.
4. The ticket status is changed to *Open (Re-Opened)*, and is recorded as a ticket activity in the Ticket Activity panel.
5. Continue with customer or ticket summary modifications as necessary.

## Sending a Ticket to a Group

To send a ticket to a group (ticket queue):

1. From a working ticket, click Send Ticket to Group in the Next Steps panel. The Send Ticket to Group pop-up window is displayed.
2. Select a ticket group from the Group drop-down list.
3. Select a reason for the reassignment from the Reason Code drop-down list.
4. Type notes related to the ticket in the Enter Note box. Notes are helpful to other users after a ticket is reassigned to provide further explanation for the reassignment reason code.

Select the Share with Customer check box to make the note available to the customer. Selecting the Share with Customer check box makes the note public and will be visible to customers using your Self Service site.

5. Click OK. The individual ticket ownership is released and the reassignment to the selected group is recorded as an activity in the Ticket Activity panel.

## Working with Multiple Tickets/Windows

ATG Ticketing provides the ability to work on multiple tickets, in multiple Service Center windows without the need for a repeated log in. For example, an agent opens a ticket in Window A and starts working on Ticket 1. The agent then opens Window B (which also shows Ticket 1 as the current ticket). The agent then opens Ticket 2 in Window B. While working on Ticket 2, the user can return to Window A and resume working on Ticket 1.

To work with multiple tickets in multiple windows:

1. From an open ticket, open a new Service Center window by selecting File > New Window (or press Ctrl+N). You will see the current ticket displayed in the original window and in the new window.
2. From the new window, search for an existing ticket or create a new ticket. The new window displays the requested Ticketing action (existing or new ticket), while the original window still displays the original worked ticket. You can continue working with either ticket in either Service Center, and/or open additional Service Center ticket windows.

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**Important!** Be sure to save your work before closing additional Service Center windows. Close additional Service Center windows *after* logging out of the original window. Once you log out of the original Service Center window, the session is no longer valid.

## Working with Customers

This section contains information and instructions for working with ticket related customer profile information in Service Center.

### Searching for Customers

To search for customers using customer profile information:

1. Click the Customers search button. The Customer Search pane is displayed.
2. Type the parameters for your search in the Customer Search panel, and then click Find.

The customer search results are displayed in the Customer Results panel.

3. From the Customer Results panel, you can:
  - Sort the customer search results by Last Name, First Name, Email, or Login Name. Select a sort type from the Sort by drop-down list, and then click Sort
  - Click a customer name to view the customer profile
  - Expand the Tickets list to view and/or work on tickets linked to a customer profile

### Creating a New Customer

Customer information added here is saved in the customer profile repository and will be available for customer searches.

To create a new customer:

1. From the Customers button drop down menu select Create New Customer.
2. Complete the customer information as required, and then click Save Customer Information. The customer profile is added to the customer profile repository and is available for customer searches.

If you select the Receive Email: Yes option, an e-mail is automatically sent to the customer e-mail address with the customer login name and system generated password.

For example:

*Your new account has been created.*

*Login Id: msmith123. Password: 533c292eeaff.*

**Note:** Changes to customer profile information are recorded as ticket activities in the Ticket Activities panel.

- 
3. Continue with Next Steps. You must select a Next Step to clear the current ticket and continue working with ATG Ticketing, or select another ticket from the Active Tickets list.

**Note:** The process of creating a new customer profile is an extension of creating a new ticket. Clicking Save Customer Information automatically assigns a ticket identification number (visible in the global context area).

## Linking a Customer to a Ticket

To link an existing customer profile to a ticket:

1. From the Ticket Details pane click Link Customer in the Customer Information panel. The Customer Profile pop-up window is displayed.
2. Type the customer profile identification number, or the customer login name, and then click OK. The customer profile information is displayed in the Customer Information panel.

## Viewing Tickets Associated with an Order

To view the tickets associated with an order:

1. Display the order.

Scroll to the Related Ticket section, which displays creation date, and description for each ticket associated with the order.

2. To work on the ticket click the Work on Ticket link.

## Viewing Orders Associated with the Current Ticket

To view the orders associated with the current ticket:

1. In the global context area, select the Ticket button.

The system displays the ticket information. A link for each associated order appears on the Tickets menu.

2. In the Tickets menu, click the link for the order you want to view.

# ATG Ticketing and Self Service

This section provides an overview of the Self Service customer experience as it relates to ATG Ticketing.

## About Self Service

The purpose of a Self Service site is to enable customers to search for and/or resolve issues themselves using information available on the Self Service site. The Self Service site enables a customer to contact your organization's support center when they are not able to find what they are looking for on their own, or when additional help is required.

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When a Contact Us form is submitted by a customer using the Self Service site, a ticket is automatically created and customer search history is appended to the ticket (recorded as Self Service activity in the Ticket Activity panel).

## Creating a Ticket (by Customer)

To create a ticket (by customer):

1. From the Self Service site, click the Contact Us link. The Contact Us page is displayed.
2. From the Contact Us page, select a problem category for the support request from the Select a Problem Category drop-down list.
3. Type a description of the problem in the description text box.
4. If logged in to the Self Service site, contact information is automatically populated in the customer contact information panel.

To provide alternate contact information, clear the existing contact information, and then enter the alternate customer contact information.

**Note:** For customers not registered or logged in to the Self Service site, customer contact information must be completed before submitting the Contact Us form.

5. After completing the Contact Us form, click Send. The issue is recorded and a ticket number is assigned for tracking purposes accessible from the My Account page in the My Tickets panel.

## Viewing a Ticket (by Customer)

After a support form has been submitted, customers can view their support issues from the My Account page.

To view a ticket (by customer):

1. Log in to the Self Service site.
2. Click My Account link. The My Account page is displayed. A list of open and closed tickets is displayed in the My Tickets panel.
3. Click the ticket number of the ticket to view in the My Tickets panel . The View Tickets page is displayed.
4. To add a note to the ticket, type related notes and information in the Add a Note box, and then click Add Note. The note is recorded and displayed in the Ticket Notes panel.

## Closing a Ticket (by Customer)

Customers can close tickets by logging in to My Account from your Self Service site.

To close a ticket (by customer):

1. Log in to the Self Service site.
2. Click My Account. The My Account page is displayed.
3. From the My Account page My Tickets panel, click the ticket number of the ticket to close. The View Tickets page is displayed.

- 
4. From the View Tickets page, click Close Ticket. The Ticket status is changed to closed.

The ticket is closed, but is still available to view from the My Tickets panel. To reopen the ticket, click Reopen Ticket from the View Tickets page.

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# Appendix A. Ticketing Tables

The following tables are used by ATG Ticketing. These tables are installed by the Configuration and Installation Manager (CIM) scripts during the installation process.

## Commerce Service Center Ticketing Tables

Commerce Service Center uses the following database tables to store ticketing information. For a complete list of tables used by Commerce Service Center, refer to the *ATG Commerce Service Center Installation and Programming Guide*.

These tables are installed by the `<ATG10dir>/CSC10.1/DCS-CSR/sql/db_components/database-vendor/DCS-CSR_ticketing_ddl.sql` script.

The tables described in this section are all used by the ticketing repository. The Nucleus component for this repository is `/atg/ticketing/TicketingRepository`.

### **csrt\_grant\_appease**

This table stores ticketing records about the granting of appeasements (store credits).

Column	Data Type	Constraint	Description
<code>id</code> ( <i>primary key</i> )	<code>varchar(40)</code>	not null	The unique ID of the record.
<code>appeasement_id</code>	<code>varchar(40)</code>	null	The ID of the store credit.
<code>amount</code>	<code>double precision</code>	null	The amount of the store credit.

### **csrt\_price\_overrde**

This table stores ticketing records of manual price overrides.

Column	Data Type	Constraint	Description
<code>id</code> ( <i>primary key</i> )	<code>varchar(40)</code>	not null	The unique ID of the record.

Column	Data Type	Constraint	Description
order_id	varchar(40)	null	The ID of the order containing the price override.
component_id	varchar(40)	null	The ID of the order component (item or shipping group) whose price was overridden.
component_type	varchar(40)	null	The type of the order component whose price was overridden. Possible values: commerceltem, shippingGroup
old_price	double precision	null	The calculated price of the item or shipping group.
new_price	double precision	null	The actual price charged to the customer for the item or shipping group.

### csrt\_order\_event

This table stores ticketing records about orders that have been modified.

Column	Data Type	Constraint	Description
id (primary key)	varchar(40)	not null	The unique ID of the record.
order_id	varchar(40)	null	The ID of the modified order.
amount	double precision	null	The total cost of the order.

### csrt\_return\_order

This table stores ticketing records of returned orders.

Column	Data Type	Constraint	Description
id (primary key)	varchar(40)	not null	The unique ID of the record.
ret_req_id	varchar(40)	null	The ID of the return request.
repl_order_id	varchar(40)	null	The ID of the replacement order (for an exchange).

### csrt\_recv\_rtrn\_itm

This table stores ticketing records of receipt of returned items.



Column	Data Type	Constraint	Description
id <i>(primary key)</i>	varchar(40)	not null	The unique ID of the record.
item_id	varchar(40)	null	The commerce item ID of the returned item.
quantity	integer	null	The quantity of the item that was returned.

### csrt\_claim\_item

This table stores ticketing records of the claiming of coupons, gift certificates, and store credits.

Column	Data Type	Constraint	Description
id <i>(primary key)</i>	varchar(40)	not null	The unique ID of the record.
claimable_id	varchar(40)	null	The ID of the coupon, gift certificate, or store credit.
claimable_type	varchar(40)	null	Type of item claimed (coupon, gift certificate, or store credit).

### csrt\_ci\_event

This table stores ticketing records about changes to the quantities of items in orders.

Column	Data Type	Constraint	Description
id <i>(primary key)</i>	varchar(40)	not null	The unique ID of the record.
item_id	varchar(40)	null	The ID of the commerce item whose quantity was changed.
old_quantity	integer	null	The previous quantity of the item.
new_quantity	integer	null	The new quantity of the item.

### csrt\_pg\_event

This table stores ticketing records about changes to payment groups in orders.

Column	Data Type	Constraint	Description
id (primary key)	varchar(40)	not null	The unique ID of the record.
pay_group_id	varchar(40)	null	The ID of the payment group that was changed.
update_type	tinyint	not null	The type of update performed. 0=modify; 1=remove; 2=add.

### csrt\_split\_sg

This table stores ticketing records about splitting up items in orders among multiple shipping groups.

Column	Data Type	Constraint	Description
id (primary key)	varchar(40)	not null	The unique ID of the record.
src_ship_group_id	varchar(40)	null	The shipping group the item was moved from.
dest_ship_group_id	varchar(40)	null	The shipping group the item was moved to.
commerce_item_id	varchar(40)	null	The ID of the commerce item that was moved.
quantity	integer	not null	The quantity of the item that was moved.

### csrt\_split\_cc

This table stores ticketing records about splitting up item costs among multiple cost centers.

Column	Data Type	Constraint	Description
id (primary key)	varchar(40)	not null	The unique ID of the record.
src_cost_ctr_id	varchar(40)	null	The cost center that the item's costs were moved from.
dest_cost_ctr_id	varchar(40)	null	The cost center that the item's costs were moved into.
commerce_ident_id	varchar(40)	null	The ID of the commerce item whose costs were moved.
quantity	integer	not null	The quantity of the item whose costs were moved.

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### csrt\_sg\_event

This table stores ticketing records about changes to shipping groups in orders.

Column	Data Type	Constraint	Description
id ( <i>primary key</i> )	varchar(40)	not null	The unique ID of the record.
ship_group_id	varchar(40)	null	The ID of the shipping group that was changed.
update_type	integer	not null	The type of update performed. 0=modify; 1=remove; 2=add.

### csrt\_order\_comment

This table stores ticketing records about order comments submitted by agents.

Column	Data Type	Constraint	Description
id ( <i>primary key</i> )	varchar(40)	not null	The unique ID of the record.
comment_id	varchar(40)	null	The ID of the comment.

### csrt\_update\_org

This table stores ticketing information about changes made to organization profiles.

Column	Data Type	Constraint	Description
id ( <i>primary key</i> )	varchar(40)	not null	The unique ID of the record.
updated_item_id	varchar(40)	Null	The ID of the organization profile that was modified.

### csrt\_orders

This table associates orders with tickets.

Column	Data Type	Constraint	Description
order_id ( <i>primary key</i> )	varchar(40)	not null	The ID of the order.

Column	Data Type	Constraint	Description
ticket_id (primary key)	varchar(40)	not null	The ID of the associated ticket.

### csrt\_oma\_event

This table stores ticketing information about changes made to adjustment updates.

Column	Data Type	Constraint	Description
id (primary key)	varchar(40)	not null	The unique ID of the record.
man_adj_id	varchar(40)	not null	The unique ID of the manual adjustment.
adjustment_type	varchar(40)	null	The type of adjustment.
update_type	integer	not null	The type of update.
reason	integer	not null	The number of the reason for the adjustment

### csrt\_schd\_event

This table associates scheduled events with tickets.

Column	Data Type	Constraint	Description
id (primary key)	varchar(40)	not null	The ID of the order.
schd_order_id	varchar(40)	not null	The ID of the scheduled order.
update_type	integer	not null	The type of update.

### csrt\_appr\_event

This table associates approval events with tickets.

Column	Data Type	Constraint	Description
id (primary key)	varchar(40)	not null	The ID of the order.
approval_id	varchar(40)	not null	The ID of the approval.
update_type	integer	not null	The type of update.

---

### csrt\_order\_appr\_event

This table associates order approval events with tickets.

Column	Data Type	Constraint	Description
id ( <i>primary key</i> )	varchar(40)	not null	The ID of the order.
order_id	varchar(40)	not null	The ID of the order.

### csrt\_grt\_prom\_event

This table associates promotion events with tickets.

Column	Data Type	Constraint	Description
id ( <i>primary key</i> )	varchar(40)	not null	The ID of the order.
promo_id	varchar(40)	not null	The ID of the promotion.

### csrt\_ign\_prom\_event

This table associates promotion events with tickets.

Column	Data Type	Constraint	Description
id ( <i>primary key</i> )	varchar(40)	not null	The ID of the order.
promo_id	varchar(40)	not null	The ID of the promotion.
order_id	varchar(40)	not null	The ID of the order.

### csrt\_gl\_event

This table associates gift list events with tickets.

Column	Data Type	Constraint	Description
id ( <i>primary key</i> )	varchar(40)	not null	The ID of the order.
giftlist_id	varchar(40)	not null	The ID of the gift list.
event_name	varchar(40)	not null	The name of the event.

---

## csrt\_gi\_event

This table associates updated gift list events with tickets.

Column	Data Type	Constraint	Description
id ( <i>primary key</i> )	varchar(40)	not null	The ID of the order.
catalog_ref_id	integer	null	The ID of the catalog.
old_quantity	integer	null	The previous quantity of items within the list.
new_quantity	integer	null	The new quantity of items within the list.

## ATG Service Ticketing Tables

ATG Service uses the following database tables to store ticketing information. These tables are installed from the <ATG10dir>/Service10.1/common/sql directory by the CIM script. The tables described in this section are all used by the ticketing repository.

### svct\_research\_act

This table stores ticketing records about agent research sessions.

Column	Data Type	Constraint	Description
activity_id ( <i>primary key</i> )	varchar(40)	not null	The unique ID of the activity
ksession_id	varchar(40)	not null	The ID of the Knowledge Manager session

### svct\_prob\_cat

This table identifies problem categories.

Column	Data Type	Constraint	Description
problem_cat_id ( <i>primary key</i> )	varchar(40)	not null	The ID of the problem category
name	varchar(40)	not null	The name of the problem category
logical_org_id	varchar(40)	null	The logical org ID.

---

## svct\_callnote\_act

This table stores ticketing records about agent call notes and is called from the `/framework/src/sql/svc_framework_ticket_ddl.xml` file.

Column	Data Type	Constraint	Description
activity_id <i>(primary key)</i>	varchar(40)	not null	The unique ID of the activity
inbound	one-digit	not null	Identifies if the ticket is inbound

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