



ETAdirect SmartCollaboration for



Version 4.5
Part Number E62376-01

Table of Contents

1 Welcome to SmartCollaboration.....	6
1.1 Basic Terms and Concepts.....	6
2 Getting Started.....	7
2.1 Community and Helpdesk Icons.....	7
2.2 'Community' Window.....	7
2.2.1 'Community' Window. Header.....	8
2.2.2 'Community' Window. List of Chats.....	8
2.2.3 'Community' Window. Address Book.....	9
2.2.3.1 Helpdesks.....	10
2.2.3.2 Other Users.....	10
3 Finding a Contact.....	11
3.1.1 Search Contact.....	11
3.2 Who's Nearby.....	13
3.2.1 Statuses of the Contacts Found.....	14
4 Managing a Conversation.....	15
4.1 Initiating Conversation.....	15
4.1.1 Chat Window. Header.....	16
4.1.2 Chat Window. Starting a new Conversation.....	16
4.1.3 The Message Input.....	16
4.1.4 Message Notifications.....	17
4.2 Joining a Chat with Another User.....	18
4.3 Inviting a User to a Conference.....	19
4.3.1 Messages in the Conference.....	21
4.4 Keep the Conversation Going.....	21
4.5 Leaving the Conversation.....	22
4.6 Re-Joining the Conversation.....	22
4.7 View History.....	22
4.7.1 History Search.....	24
5 Managing Contacts.....	25
6 Context Awareness.....	27
6.1 Start a Chat with a Community User from the Hint.....	27
6.2 Share Resource Details.....	27
6.3 Use SmartCollaboration to Process Activities and Inventory Items.....	29
6.3.1 Sharing Details/Transferring Inventory in Manage Application.....	29
6.3.2 Sharing Details/Reassigning Activity in Manage Application.....	30
6.4 Process Activities and Inventory Items via Community in Mobility Application.....	31
6.4.1 Share Activity/Inventory Details in Mobility Application.....	31
6.4.2 Reassign Activity/Transfer Inventory in Mobility Application.....	32
6.4.3 Receive Activity/Inventory Details.....	33
6.4.4 Transfer Cancelled or Rejected.....	33
7 Helpdesk.....	34
7.1.1 The Helpdesk Window. Header.....	34
7.1.2 'Helpdesk' Window. List of helpdesks.....	34
7.1.3 'Helpdesk' Window. Transferring Conversations.....	36
7.1.4 'Helpdesk' Window. Leaving a conversation.....	37

7.2 Other Helpdesks.....	38
8 System Settings that May Influence Contact Awareness Functionality.....	39
8.1 User-Resource Association Restraint.....	39
8.2 Reassignment/Transfer Constraints.....	39
8.3 Other Issues.....	39

1 Welcome to SmartCollaboration

SmartCollaboration is an on-demand ETAdirect functionality that enables context-aware interaction between different ETAdirect participants. SmartCollaboration consists of Community, a comprehensive tool for chats between different ETAdirect users (e.g. field employees, helpdesk operators, dispatchers), and Helpdesk, a tool for helpdesk operators to help them handle requests from other users.

SmartCollaboration gives access to necessary information in real-time. You don't need a phone number or an email address to contact a person as long as you have them in your Address Book in SmartCollaboration. You can easily get information on who is online and who is not, as well as receive information on activities and inventory and reassign and transfer them to a different resource.

Anyone can initiate a text chat with any other member or members. SmartCollaboration supports both conference chats and one-to-one instant messaging.

If you have a question that you do not know the answer to, you can address it to Helpdesk which has knowledgeable operators who can help with any issues that deal with your activity.

SmartCollaboration also keeps history of all your chats and transfers, so you can go back at any time and access the information that you need.

1.1 Basic Terms and Concepts

The reader hereinafter is addressed as 'you'.

The following terms are used in the document. The terms are provided in the order found best to understand.

Term	Description
User	any ETAdirect user for which the SmartCollaboration functionality is enabled
Chat	conversation between you and other SmartCollaboration User
Conference chat	conversation between you and several other SmartCollaboration Users
Message	a single piece of communication sent to Chat by a User or verbalization of the User's actions (sent message, shared information, joining and leaving the chat, etc.)
Chat participant	you or any other SmartCollaboration User engaged in a Chat (either initiating or joining it)
Initiate a chat	send the first message to another SmartCollaboration User
Join a chat	become a Chat Participant, answer a message
Leave a chat	stop participating in a Chat
Hide a chat	minimize the Chat window (but not leave a chat)
Present chat participant	a Chat participant that has initiated or joined the chat and has not left it (hiding a chat does not disable it)
Active chat	a Chat that you have initiated or joined and have not left (hiding a chat does not disable it)

Acknowledged message	message from another Chat participant, followed by any other message sent by you
Helpdesk	collection of chats created by different users where users can address their questions to qualified personnel and get answers in realtime
Helpdesk operator	qualified person who can process questions in the Helpdesk
Mobility Application	Product that allows field personnel to interact with the system
Manage Application	Product that allows to manage workforce and appointments in realtime. Usually serves as an interface for dispatcher

2 Getting Started

2.1 Community and Helpdesk Icons


As soon as the SmartCollaboration mode is activated for you, two chat icons will become visible in the top right corner, next to the 'Search' icon (Figure 1).

The first chat window is Community, and the second chat icon – Helpdesk created for helpdesk operators. The second icon will only be visible if you run any helpdesks.



Figure 1: Community and Helpdesk Icons

2.2 'Community' Window.

'Community' Window is the window that initially appears when you start working with this feature. In the course of work with Community other windows may appear, the headers of which will have an arrow  Click/tap the arrow button to go back to the Main Window. In both Manage and Mobility applications the Main Community Window consists of (Figures 2,3).

- Header (1)
- The list of active chats, if any (2)
- The list of helpdesks added to your Address Book (3)
- Address Book includes contacts that were added either by the user or the administrator

The list of contacts of other SmartCollaboration users, if any (4)

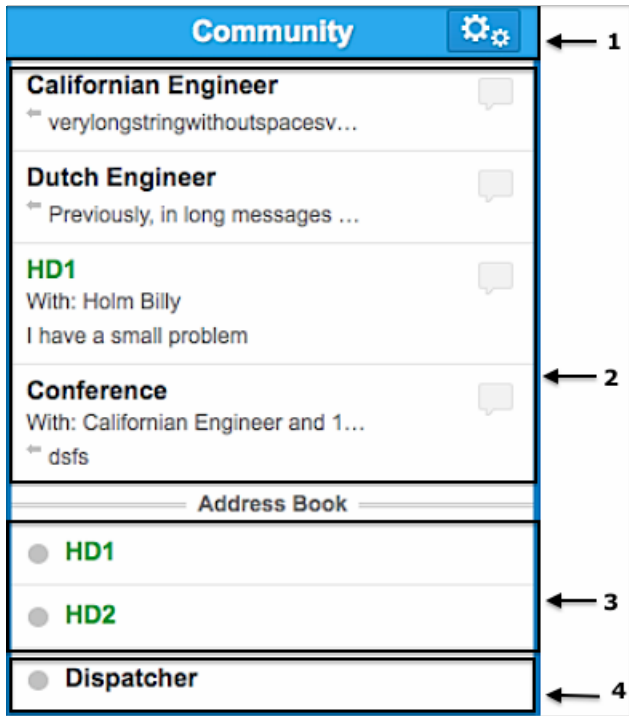


Figure 2: 'Community' Window, Manage Application

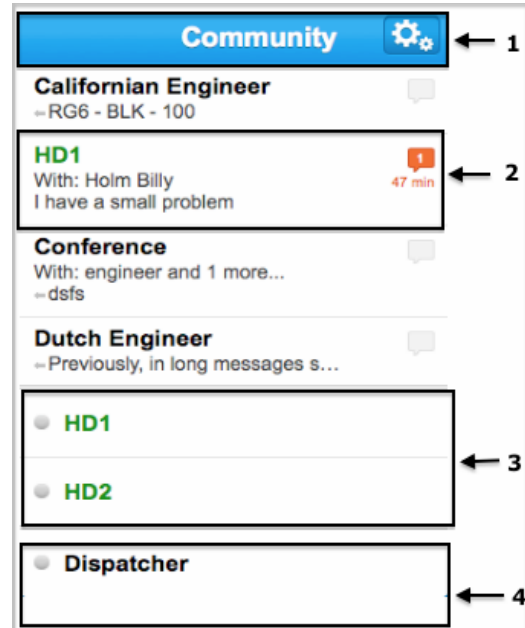


Figure 3: 'Community Window', Mobility Application

The structure of the 'Community' Window in the Manage and Mobility applications is similar. There are two lists in Manage Application – one is the list of helpdesks and the other- users. They are separated with the 'Address Book' section sub-header.

If for any of the sections there is no data in the system (e.g. there are no chats going on, or the user has no contacts in the address book), message prompting you to search contacts appears.

2.2.1 'Community' Window. Header

The Community Window Header consists of the name – 'Community' and the Menu Icon (Figure 4).



Figure 4: 'Community' window header

2.2.2 'Community' Window. List of Chats

All one-to-one and conference active chats and all your requests to helpdesks will appear at the top of the Community Window (just below the header). All conversations will be displayed in the order they were received. For each conversation in both Manage and Mobility applications you will see:

Details to identify the conversation (Figure 5):

- Details of the conference (1)
- Name of the second chat participant (2)
- Name of the helpdesk you've sent your question to (3)
- The last message of the conversation (4)

- If this message was sent by you, the left-pointed arrow will be displayed next to the message text (5)

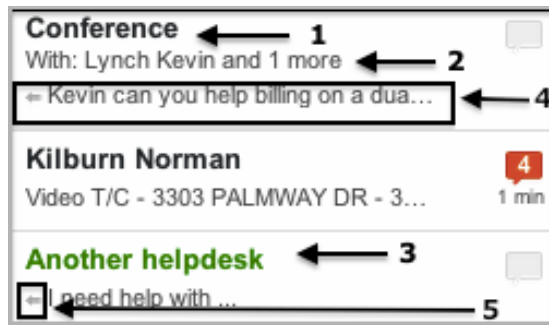


Figure 5: List of chats

Number of non-acknowledged messages (Figure 6):

- If the last message in the conversation was sent by you, the message-number box is grey and empty (6)
- If the last message in the conversation was sent by another user or a helpdesk operator, the message-number box will turn red and display the amount of not-acknowledged messages (which were sent after your last message) (7).

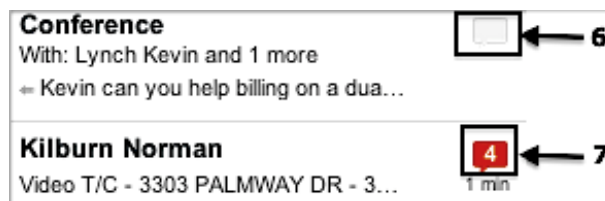


Figure 6: Non-acknowledged messages

Time since the first non-acknowledged message (Figure 7):

If the time since the first received and not acknowledged message doesn't exceed the threshold it is displayed in black (8), otherwise – in red (9).

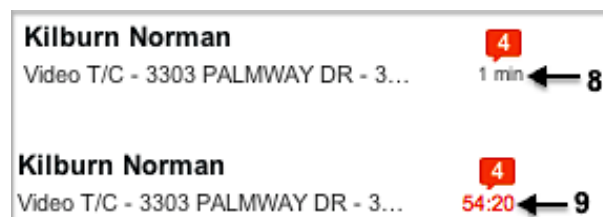


Figure 7: Time since the first non-acknowledged message

2.2.3 'Community' Window. Address Book.

Address book contains the list of helpdesks and other added users. In the Manage Application there is a special sub-header for it – 'Address Book', in the Mobility Application it is taken out to save space, but the

contacts are located in the same manner below the List of chats.

2.2.3.1 Helpdesks

The helpdesks are arranged in the alphabetical order with their status is displayed.

Helpdesk is online as long as at least one of its operators is online. For such helpdesk the icon in the Address Book is a green circle ●.

Helpdesk is offline if none of the helpdesk operators are online. For such helpdesk the icon in the Address Book is a grey circle ●.

Click/tap on any of the helpdesk names in the list will open the Helpdesk Chat.

2.2.3.2 Other Users

The list of users you can chat with is displayed in both Manage and Mobility Applications below the list of helpdesks. The users are arranged in the alphabetical order with their statuses displayed (Figures 8, 9).

If the user is online, the icon in the Address Book is a green circle ●.

If the user is offline, the icon in the Address Book is a grey circle ●.

Click/tap on any of the User names in the list to open the Chat.

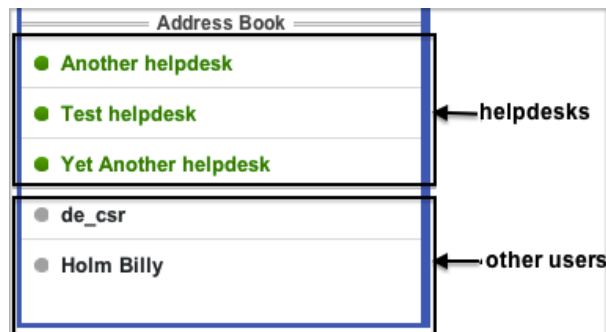


Figure 8: Address Book, Manage Application

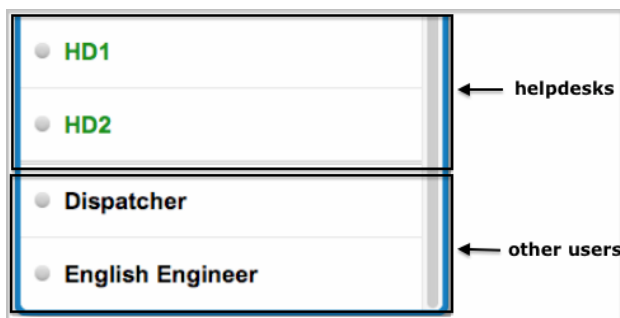


Figure 9: Address Book, Mobility Application

3 Finding a Contact

In order to start a chat, click on the user you want to chat with. In order to view user details, find a user or a helpdesk follow the steps below:

- **Address book in the 'Community' window**

Find a user you want to chat with in your Address Book and proceed with the chat.

- **'Search' window**

Find users/helpdesks whose name or description contains specific set of symbols using the search key.

- **'Who's Nearby' window**

Find the users whose latest uploaded location is close to your current physical location, available in the Mobility Application only.

3.1.1 Search Contact

'Search Contact' can be used to find any other Community user (Figures 10, 11).

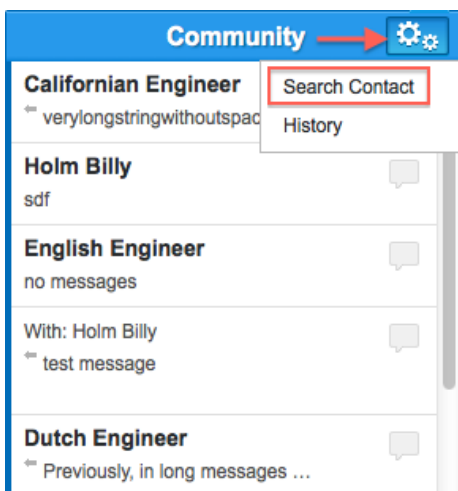


Figure 10: 'Search Contact', Manage Application

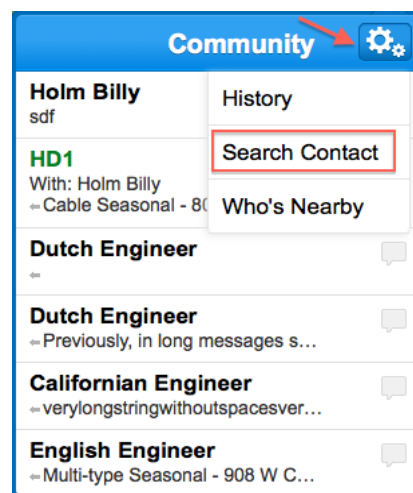


Figure 11: 'Search Contact', Mobility Application

As soon as the 'Search Contact' is clicked/tapped (Figure 12).

- Header is changed to 'Search Contact' (1)
- 'Community' arrow appears in the header (2)
- Search key field appears below the header (3)
- Icon field will appear in the Manage Application App or tap the button to start the search in the Mobility Application (4)



Figure 12: Search Window, Manage Application

To get back to the Main Window click the 'Community' arrow (2)

To find another User or Helpdesk with 'Search Contact' window, enter the search key in the search key field (3). The search key has to contain at least 2 symbols and is case insensitive (Figure 13).

Initially there are no contacts in the Search results.

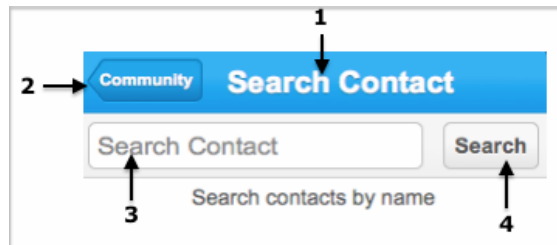


Figure 13: Search Window, Mobility Application

In the Manage Application the list of Helpdesks and Users whose name or description contain the search key will appear below the search key field as the key is entered, the list will be updated respectively.

In the Mobility Application the search is performed only after the 'Search' button is tapped. The list of Helpdesks and Users whose name or description contains the search key will appear below the search key field after the 'Search' button is tapped.

The results are the same for both Manage and Mobility Applications Initially only ten chats are displayed Initially only ten chats are displayed (Figure 14).

- Search Contact Window (1);
- The search key is displayed in the search key line (2)
- The Helpdesks are displayed in green in the alphabetical order. Other users are displayed below the Helpdesks in the alphabetical order
 - Initially only the first ten results are displayed. If the needed result is not within the list, you can specify the search key or click/tap 'Load more' button below the list (3). Top ten results will appear below
 - To clear the search key line click the cross in the search line (4) and enter a new key to get the results.

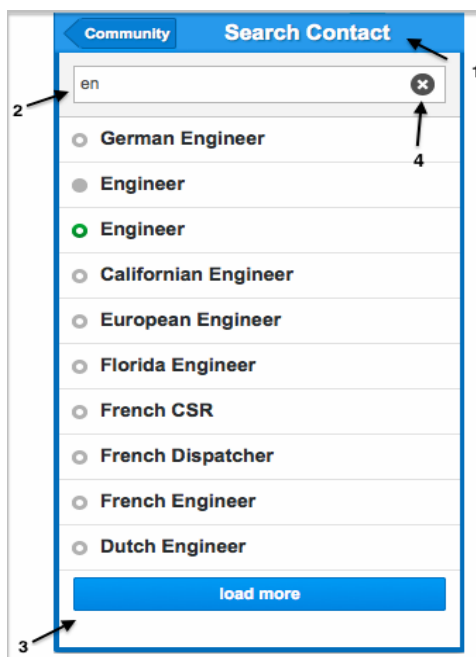


Figure 14: Searching Contacts

3.2 Who's Nearby

'Who's nearby' option can be used to find Community users who are geographically close to your current location. Available from Mobility Application only.

To get to 'Who's Nearby', go to the 'Community' window in the Mobility Application, click the menu icon and choose 'Who's Nearby' option (Figure 15).

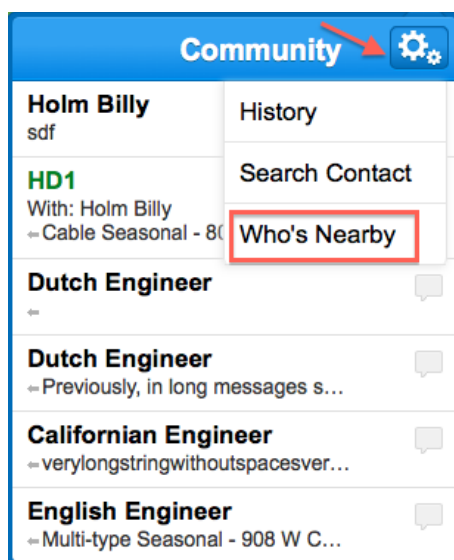
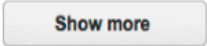


Figure 15: 'Who's Nearby' button

When 'Who's nearby' is clicked (Figure 16):

- Header is changed to 'Nearby' (1)
- Community arrow appears at the header (2)
- The list of all the Users (3) whose latest geolocation uploaded to the system is close to yours is displayed 'Based On Your Physical Location' sub-header
- The users are arranged according to the distance from their location to yours. Distance is displayed opposite of the contact name (4)
- Initially, the ten closest users are displayed and you can click the  button at the bottom of the list. If the contacts found do not fit the screen, use the scrollbar (5).

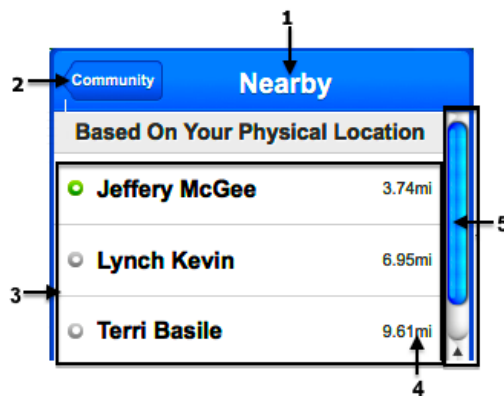


Figure 16: Nearby Window

3.2.1 Statuses of the Contacts Found

Once you've found a user close to you or a user/helpdesk with a specific name, they may be displayed with one of the statuses pictured on Figure 17.





Online?	Address-Book?	Status icon
YES	YES	
YES	NO	
NO	YES	
NO	NO	

Figure 17: Contacts Statuses

4 Managing a Conversation

This section covers the ways to:

- Initiate a conversation and join a chat with another user
- Invite other users to a conference and join a conference
- Keep conversation going and leave a conversation
- View the history of conversations you left

4.1 Initiating Conversation

In order to initiate a conversation with any of other users or send an inquiry to a helpdesk, find the user/helpdesk and click on the name for a Chat window to appear (Figure 18, 19).

In the Manage application it is a separate window and in the Mobility Application it is a part of the Community window. Initially the chat window consists of:

- Header (1)
- Start new conversation with (2)
- The message input (3)

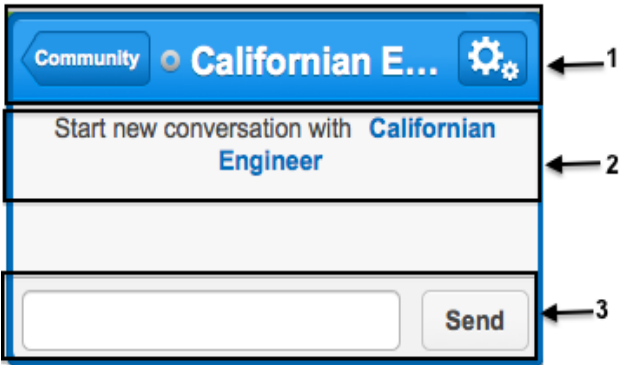


Figure 18: Initial Chat Window, Mobility Application

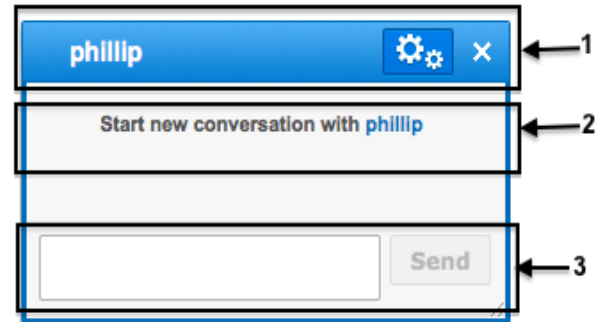


Figure 19: Initial Chat Window, Manage Application

4.1.1 Chat Window. Header

Header of the chat window contains (Figure 20):


- User/Helpdesk name: name of the user/helpdesk you are about to initiate a chat with
- Menu icon: click on the icon to reach the Chat Window Menu
- Hide chat button: in the Manage application click on the  button to hide a conversation
- Community arrow: in the Mobility Application, tap the arrow to get back to the 'Community' window (Figure 21).



Figure 20: Chat window header, Manage Application



Figure 21: Chat window header, Mobility Application

4.1.2 Chat Window. Starting a new Conversation

Initially, 'Start new conversation with {user/helpdesk}' inscription will appear in the middle of the chat window. Name of the user/helpdesk is a link to their Info Window. To start a chat use the message input part (Figure 22).



Figure 22: Start conversation with...

4.1.3 The Message Input

The message input part consists of the input field and send button. Type the message in the input field and click 'Send' (Figure 23).



Figure 23: Message input

4.1.4 Message Notifications

You will be able to identify the status of your message, by the 'sending' and 'delivered' icons that will appear on your screen (Figure 24).

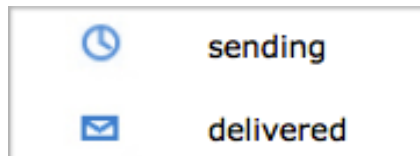


Figure 24: Message delivery statuses

Once the other party starts typing, you will see the "{User_name} is typing" notification displayed on your screen (Figure 25).

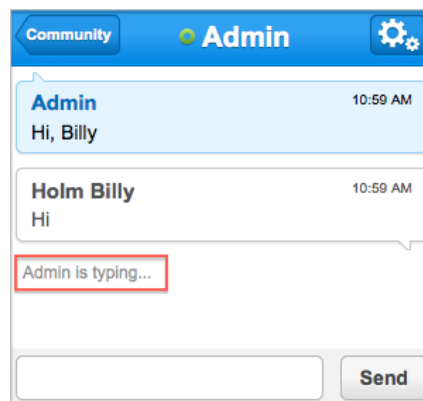



Figure 25: 'User is typing' notification

Once you receive a message, the Community icon will display a number, respective to the amount of new messages you have .

In addition to visual notifications, SmartCollaboration also supports the following:

- vibration (for devices supporting vibration alerts) and system popups
- sounds for the following events:
 - user is invited to a conversation or conference
 - a new message is received in an inactive conversation window
 - activity reassignment or inventory transfer is requested
 - activity reassignment or inventory transfer is failed/cancelled/rejected
 - new request is received by Helpdesk

The sound notifications can be set in 'My Display' (Figure 26) screen and User Screen (Figure 27). There are four options available: Off, Quiet, Loud, Persistent (repeating sound notifications of an incoming message.) Persistent notifications are only available in the Mobility Application. By default, the sound

notifications are set to 'Quiet'.

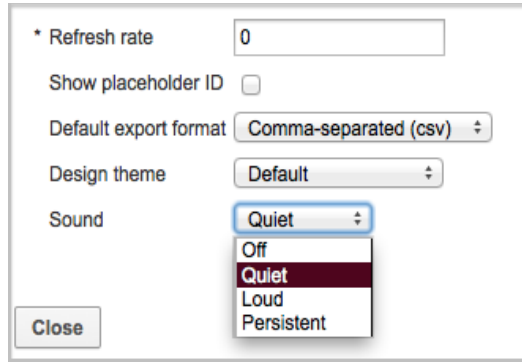


Figure 26: Available sound options in 'My Display'

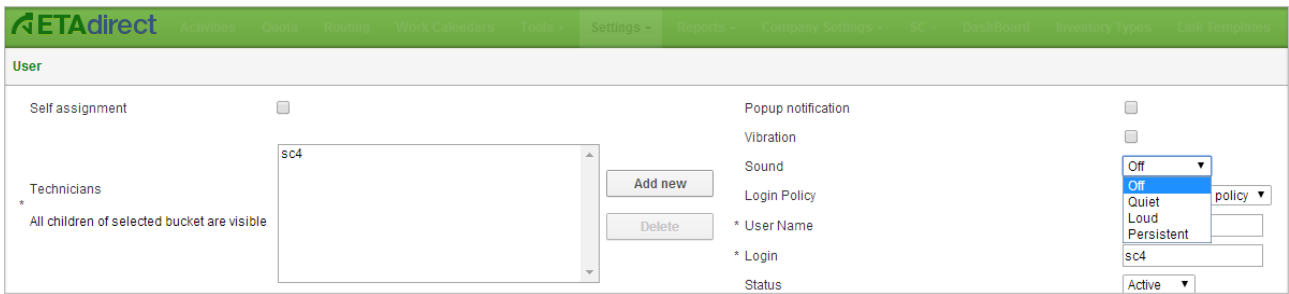


Figure 27: Available sound options in 'User' screen

4.2 Joining a Chat with Another User

If another User has initiated a chat with you:

- In the Manage application: new chat window will appear on the screen (Figure 28).

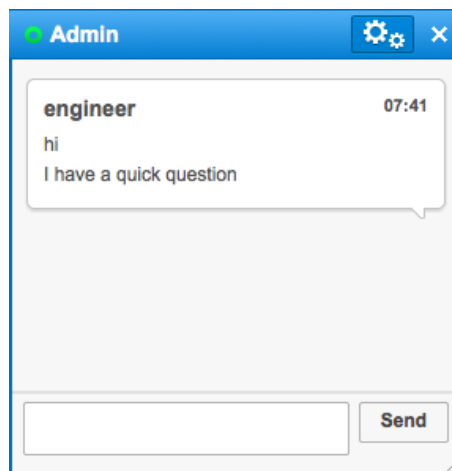


Figure 28: Another user has initiated a chat, Manage Application

- In the Mobility Application if Community is hidden: chat window will appear on the screen (Figure 29).

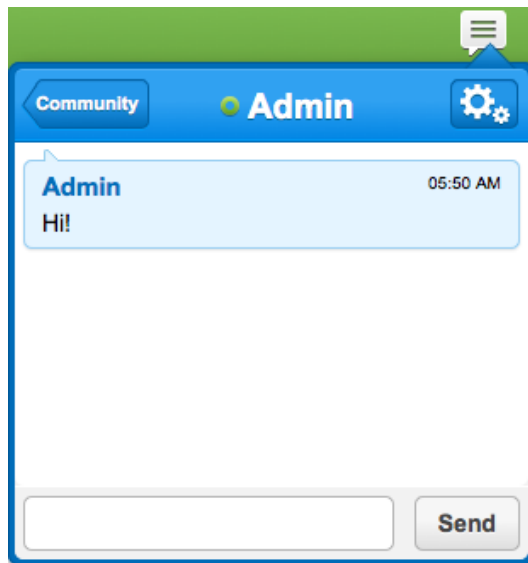


Figure 29: Another user has initiated a chat, Mobility Application

4.3 Inviting a User to a Conference

If you want to invite another user to an active chat:

- In Manage Application: Find a user you want to invite either from your Address Book or via Search Contact screen, and drag the user's name to the chat window (Figure 30).

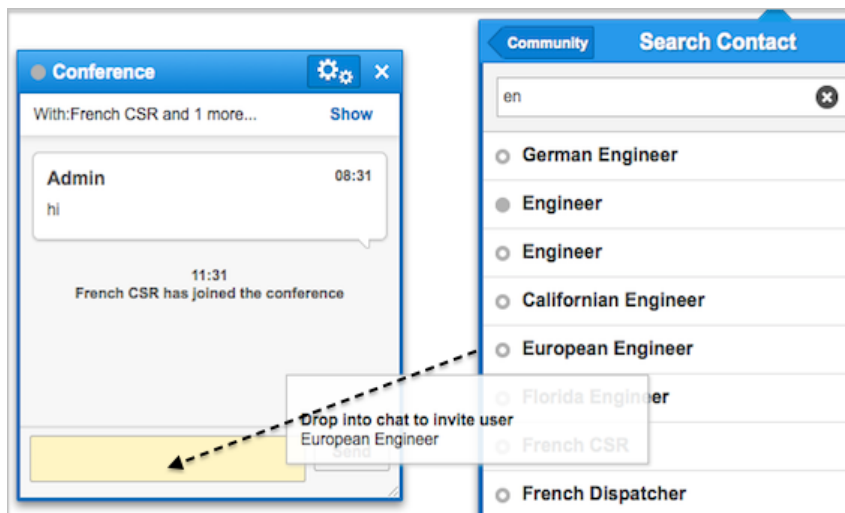


Figure 30: Inviting user to a chat

- In Mobility Application:
Open the chat you want to invite a user to (Figure 31).

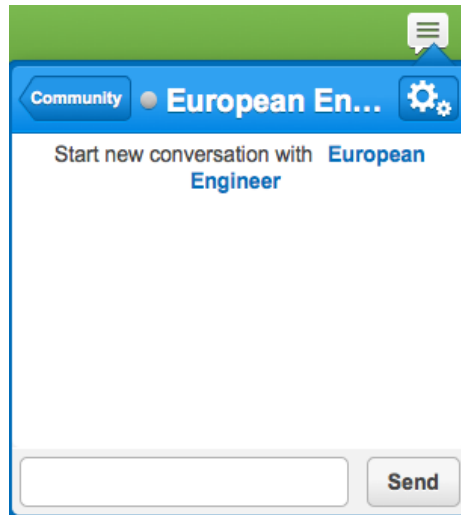


Figure 31: Opening the chat window

Go to the menu and choose 'Invite User' (Figure 32).

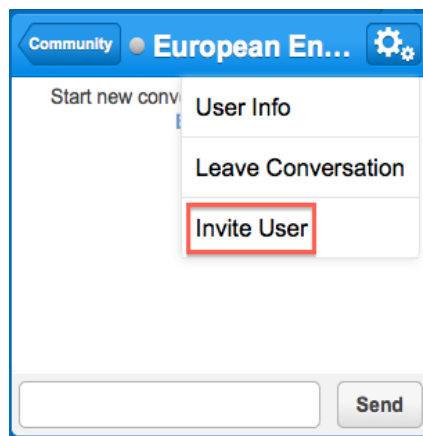


Figure 32: 'Invite User' button

- Find a user you want to invite and click their name (Figure 33).

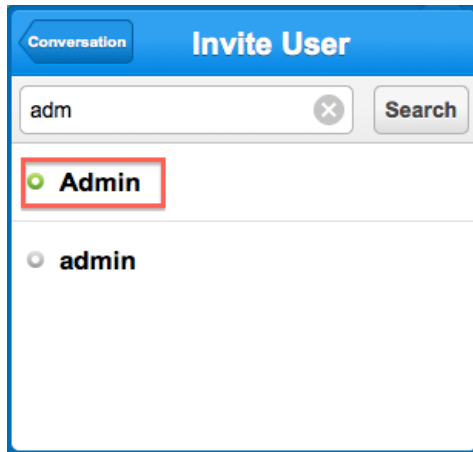


Figure 33: Inviting a user

The user will join your chat. Chat with over two participants is considered a conference (Figure 34).

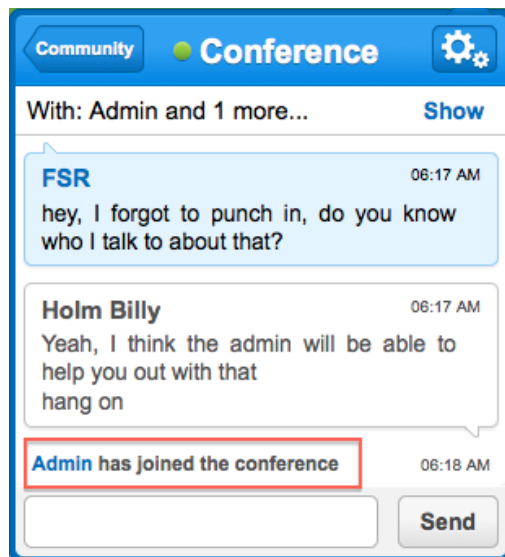




Figure 34: The user has joined the conference

4.3.1 Messages in the Conference

When a user joins a conference, all the messages written in the conference before will also be visible. After a participant leaves the conference, all messages will still be available to the user.

4.4 Keep the Conversation Going

In the Manage application all chats are initially displayed on the screen. You can click the cross  button in the Chat window header to hide the conversation.

In the Mobility Application all chats may appear in the same window (to save the space and thus enhance usability of portable devices). You can tap the  arrow to get back to the 'Community' window.


As soon as you've first clicked the contact (even if no messages were written) the chat will appear at the top of the Community Window, in [the List of chats](#). You can click any of the chat headers to get to the

Chat window.

If any other participant of the conversation (e.g. a helpdesk operator or another community user) sends a message to the chat, the count of not-acknowledged messages in the Communication [icon](#) will change.

If a user leaves or joins the conversation the descriptive message is also generated in the Chat window.

4.5 Leaving the Conversation

If you hide a conversation (click the cross  button in the Chat window header in the Manage App or return to Community window), the conversation will disappear from the screen, but you will still be its active participant.

If you want to stop participating in the conversation, select the 'Leave conversation' option in the Chat Window menu (Figure 35, 36).

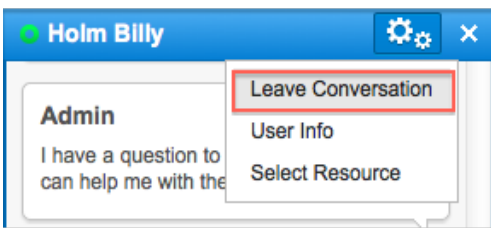


Figure 35: Leaving the chat, Manage Application

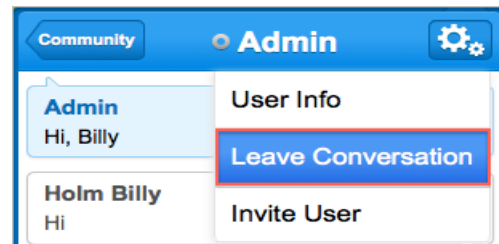


Figure 36: Leaving the chat, Mobility Application

Once you've left the conversation, you will not be notified of any new messages in the conversation, but will still be able to view it with the History functionality.

If another user has left the conversation you will get a '{User name} has left the conversation' message.

If you want to keep chatting with the user, who has left the conversation, just type another message into the existing chat and addressee will get re-invited into this chat.

4.6 Re-Joining the Conversation

You can return to the conversation after leaving it, only in case there is still at least one active participant. Otherwise, the conversation is no longer available for chatting and you will have to start a new conversation in that case.

4.7 View History

Once you left a conversation, you can find it in the History window. To get to the History window, go to the 'Community' window, click the menu icon and choose the 'History' option (Figure 37,38).

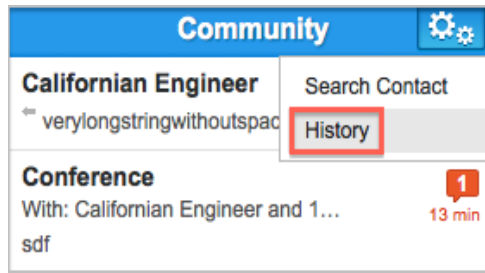


Figure 37: Obtaining conversation history, Manage Application

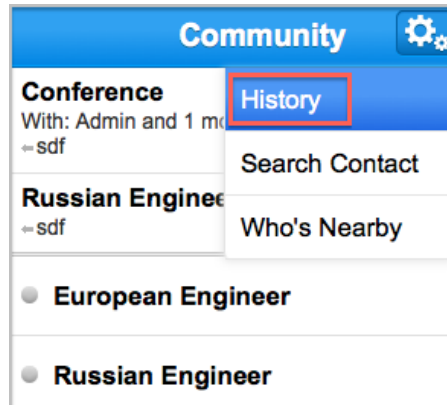


Figure 38: Obtaining conversation History, Mobility Application

As soon as the menu item is clicked/tapped, the History window will appear. In both Manage and Mobility Application (Figure 38).

- Header is changed to 'History' (1)
- 'Community' arrow appears at the header (2) – click the arrow to get back to the 'Community' window
- Search area appears below the header (3), it can be used to search through the text of messages in the History
- History list contains messages from the latest conversations
- Name you can click on any name in the displayed list, to get details on that particular conversation (4)
- Show more: Once you've initiated a chat with a user or helpdesk, you can view the details. Initially only ten chats are displayed, a 'Show more' button (5) appears at the bottom of the list to load next ten chats (Figure 39).

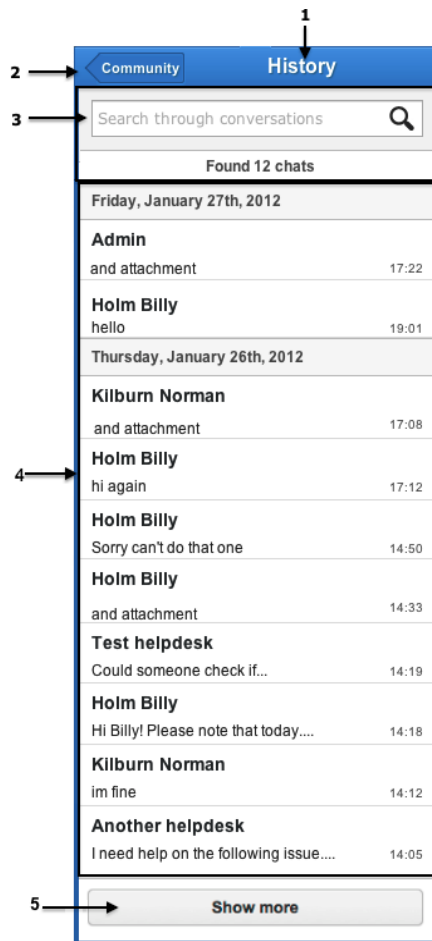


Figure 39: History window, Manage Application

The conversations on the list are organized by the date they were initiated. Within one initiation date, messages are displayed in the order they were received.

4.7.1 History Search

To use the search area to look for specific content within messages in the history, enter the search key in the search area. In the Manage Application, the content will be filtered according to the key entered in the search field (Figure 40). In the Mobility Application, the search will commence once the 'Search' button is tapped (Figure 41). Click the 'cross' button to clear the search results.

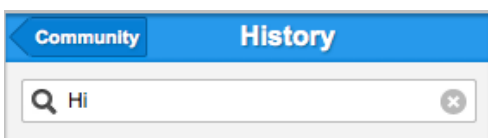


Figure 40: History search, Manage Application

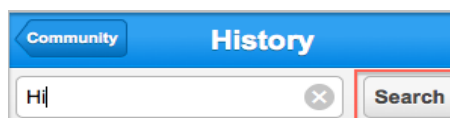


Figure 41: History Search, Mobility Application

All the messages that contain the key will be displayed. If several messages within one conversation meet the search requirements, they will be displayed below the chat header in the order they were sent. Click on the message to open the chat and see all messages in the conversation.

If the Mobility Application goes offline, SmartCollaboration is disabled and cannot be used. However, the

ability of accessing the chat history in the offline mode remains available.

When the Mobility Application switches to the offline mode, only the 'History' link is available which displays the list of chats and the chats history in the ReadOnly mode (Figure 42).

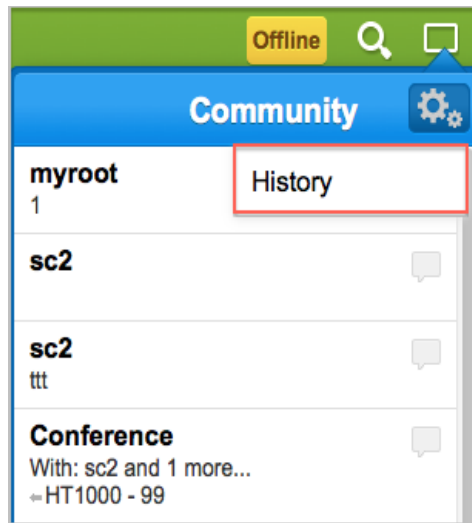


Figure 42: 'History' in the offline mode

At the same time, all active chats remain shown in the Community window for the user to view in the offline mode.

5 Managing Contacts

Once you've initiated a chat a user or helpdesk, you can view the details and add them to or remove from your address book. This can be done from the User Info screen.

To reach the user info screen, you can:

- Click on the name of the user in a chat window, regardless of whether it's an active conversation or one you left and found with the History functionality.
- If this is a one-to-one chat you can also use 'User info' option in the 'Chat' window menu (Figure 43).

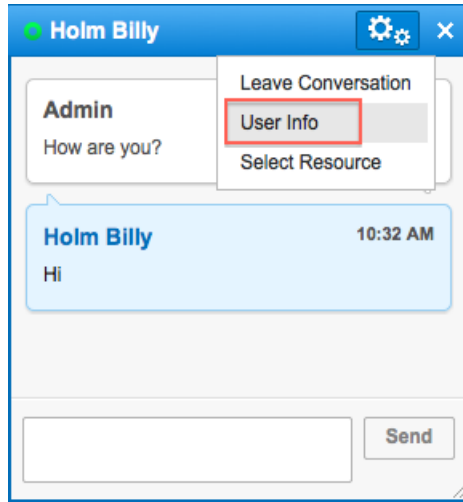


Figure 43: 'User Info' button

When you click any of the options above, the 'User info' screen will appear (Figures 44, 45).

- Header is changed to 'User info'
- 'Conversation' arrow appears and can be clicked to return to the 'Chat' window
- Below the header you can see the user/helpdesk name
- Below the name there is a status icon (grey = offline, green = online, circle = in your Address book, ring = not in your Address book)
- Button 'History' will open the History window with all the closed chats which both you and the contact participated in
- Button 'Add To Address Book' for contacts not in your Address book and 'Remove From Address Book' for the rest.

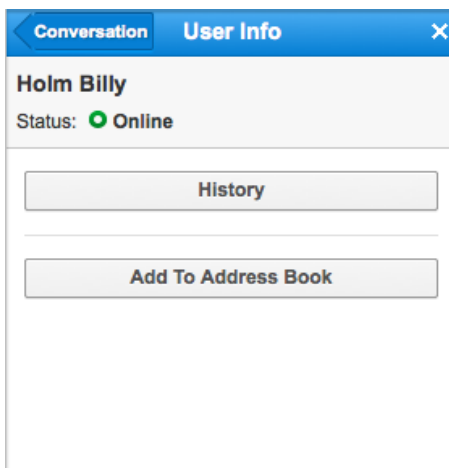


Figure 44: 'User Info' Window, Manage Application



Figure 45: 'User Info' Window, Mobility Application

6 Context Awareness

An important feature of the SmartCollaboration is an ability to provide the context-related data to the users as it is available in ETAdirect. So, you can start a chat with a user from the resource hint or activity hint – (from the Manage application), share details of a resource (from the Manage application), share details of activity/inventory, reassign activity, or transfer inventory to a resource from SmartCollaboration (from the Manage and Mobility Application).

6.1 Start a Chat with a Community User from the Hint

It is possible to initiate a conversation with a user, associated with the resource from a hint of the resource and/or activity assigned to a resource (Figure 46).

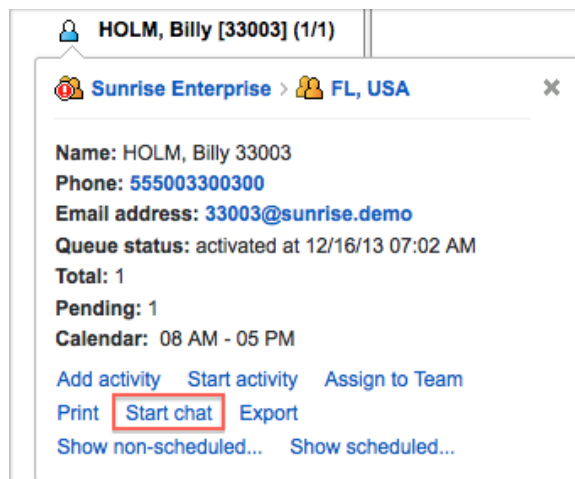


Figure 46: Starting a chat from the Resource hint

6.2 Share Resource Details

It is possible to share the details of a specific resource with a SmartCollaboration user/helpdesk operator you are chatting with from the Manage application. Please note, that the data can be shared regardless of the application used by the addressee (both Manage and Mobility Application).

To share the details:

- Open the Chat window with the user/helpdesk and drag the icon of the resource to the Chat window (Figure 47)
- Drop the resource to the chat window field and click 'Send'

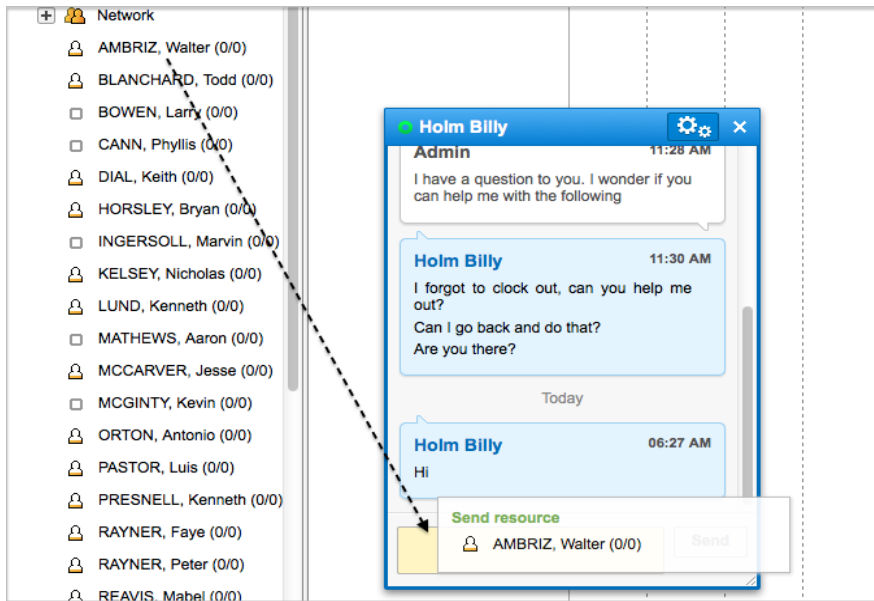


Figure 47: Dragging and dropping a resource to a chat

- The addressee will receive the message: 'Shared resource info' {Resource icon} {Resource name}.

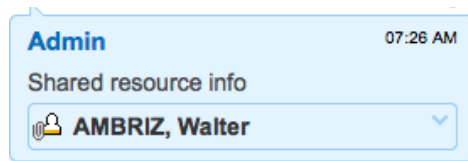



Figure 48: Resource Data Shared

- Click/tap  on the right from the icon to get more details on the resource.

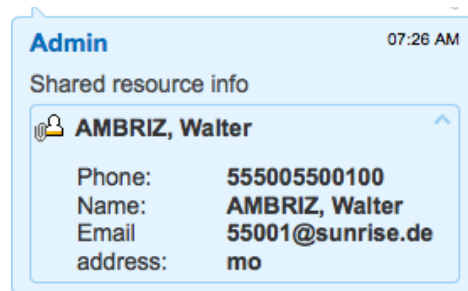


Figure 49: Resource Details

6.3 Use SmartCollaboration to Process Activities and Inventory Items

You can use ETAdirect Community functionality to share activity and inventory item details with another user, Helpdesk operator, or a conference, as well as reassign an activity or transfer inventory to a resource associated with the User. You can still add a message along with the attachment (Figure 50, 51).

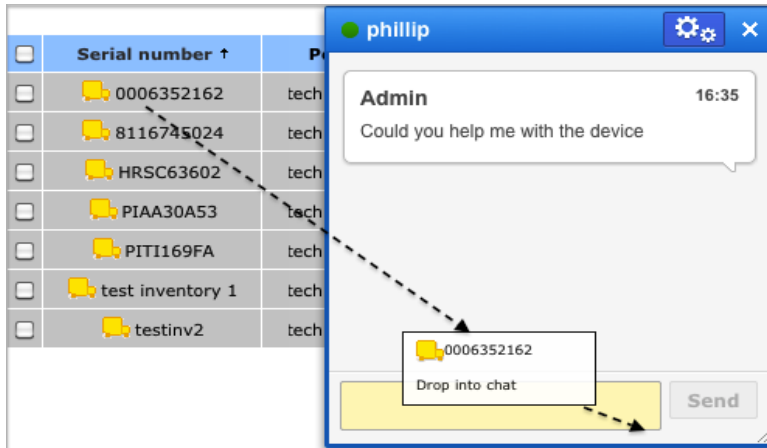


Figure 50: Dragging and dropping inventory into a chat window

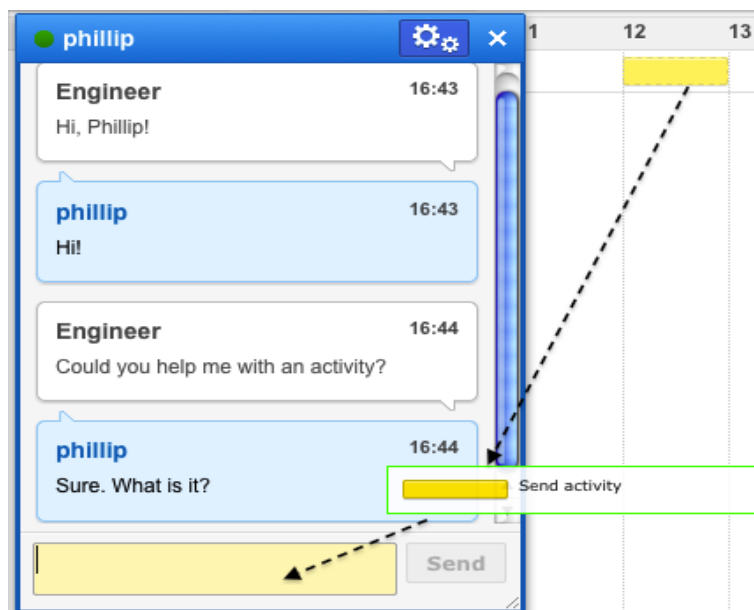


Figure 51: Dragging and dropping an activity bar into a chat window

6.3.1 Sharing Details/Transferring Inventory in Manage Application

Inventory transfer is not available in case:

- user doesn't have the necessary permissions
- action is not permitted by the inventory type settings
- you are not in a one-to-one chat
- inventory does not belong to the technician's pool

Inventory icon and their identifier will appear in the chat window. Click/tap 'Send' to send the details to the conversation addressee (Figure 52).

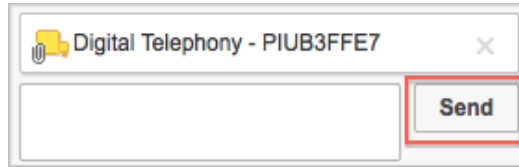


Figure 52: Sharing Inventory Info

If inventory transfer is available, inventory icon and the identifier will appear in the message input field and two options will appear below it. Select 'Transfer' to transfer inventory to the addressee, and 'Send Info' to send information respectively (Figure 53).

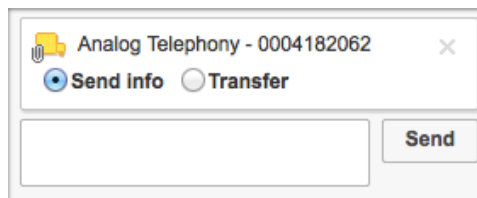


Figure 53: 'Send Info' and 'Transfer' options

6.3.2 Sharing Details/Reassigning Activity in Manage Application

Activity reassignment is not available in case:

- user doesn't have the necessary permissions
- action is not permitted by the activity type settings
- addressee cannot be assigned or execute activities
- you are not in a one-to-one chat
- activity is not in pending status
- activity is mass and/or repeating

Activity bar and its identifier will appear in the message input field. If the activity cannot be reassigned, the 'Reassign' button will be disabled, thus, you will only be able to share the details of the activity with the addressee (Figure 54).

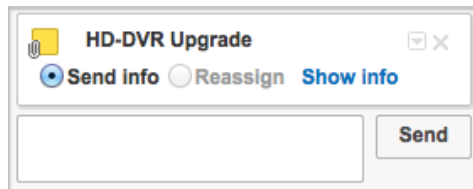


Figure 54: Sharing Activity Details

If activity reassignment is available, activity bar and the identifier will appear in the chat window and two options will appear below it. Select 'Reassign' to reassign activity to the addressee, and 'Send Info' to send information respectively (Figure 55).

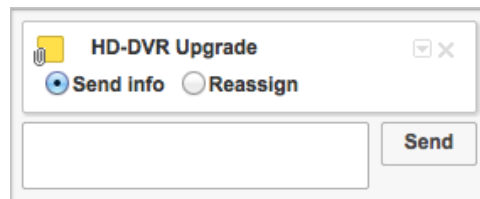


Figure 55: 'Send Info' and 'Reassign' options

If the activity reassignment breaks any of the restrictions in the system, warnings will appear below the selected activity in the 'Send' box (Figure 56).

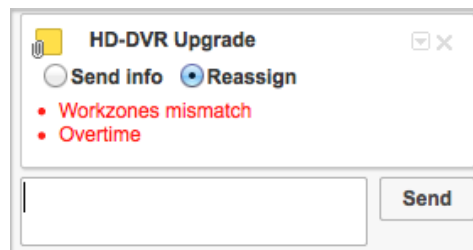


Figure 56: System warnings

6.4 Process Activities and Inventory Items via Community in Mobility Application

- Open the page of an activity or inventory that you want to share with the user/helpdesk operator/conference or reassign/transfer to a specific user
- Open the Community and go to a Chat window of the conference/helpdesk/one-to-one chat
- Go to the Chat window menu.

6.4.1 Share Activity/Inventory Details in Mobility Application

When you go to the activity details or inventory details page, 'Share Activity' and 'Share Inventory'

options will appear at the bottom of the menu (Figure 57).

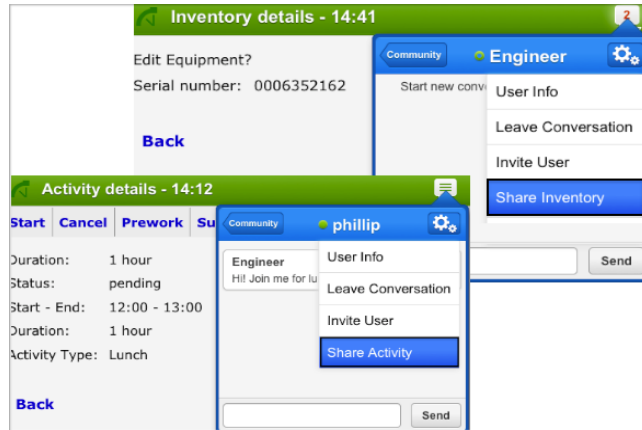


Figure 57: 'Share Activity' and 'Share Inventory' options

Tap 'Send' to share the attachment (Figure 58).

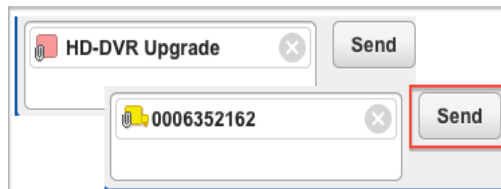


Figure 58: Sharing activity/inventory details with the addressee

Activity/inventory icon and identifier will appear in the message input field. Tap 'Send' to share their details with the addressee.

6.4.2 Reassign Activity/Transfer Inventory in Mobility Application

If activity reassignment / Inventory transfer is available, 'Reassign Activity' and 'Transfer Inventory' options will appear (Figure 59).

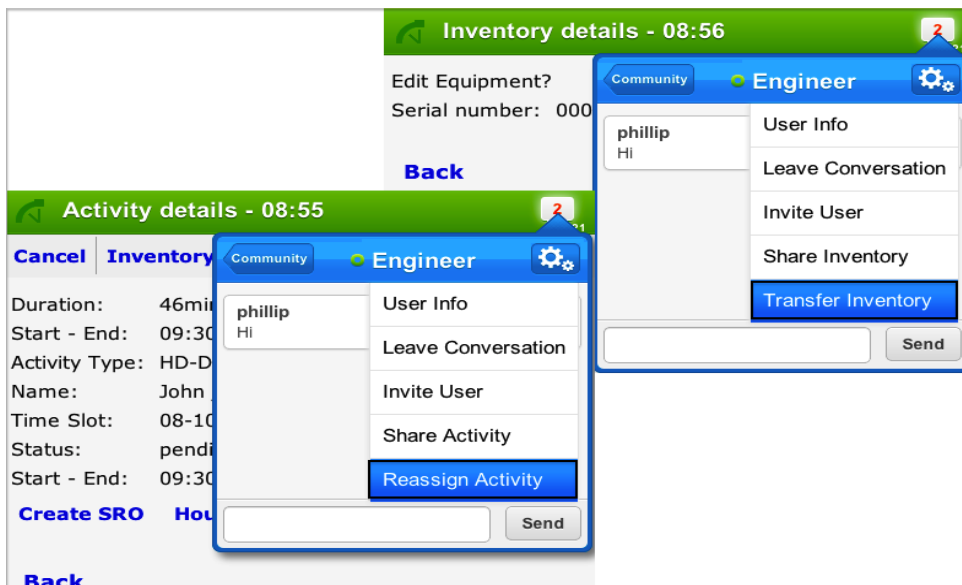



Figure 59: 'Reassign Activity'/'Transfer Inventory' options

6.4.3 Receive Activity/Inventory Details

If 'Share' option has been chosen, the addressee regardless of whether Manage or Mobility Application is used will receive the message: 'Shared activity/inventory info' {Activity/Inventory icon} {Activity/Inventory identifier}.

Clicking/tapping the  to the right from the icon, will reveal more details of the activity/inventory (Figure 60).

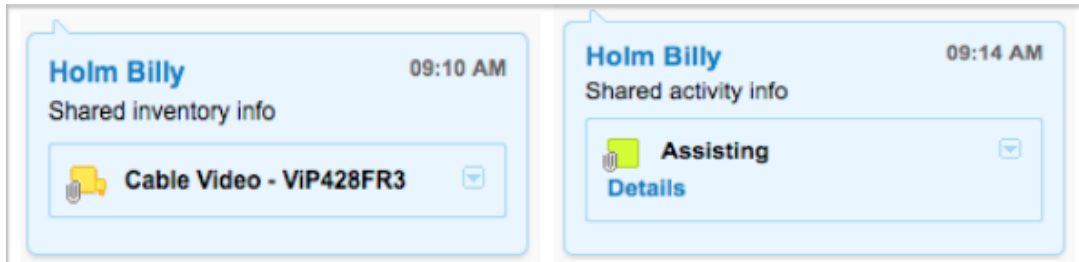


Figure 60: Receiving Activity/Inventory Details

6.4.4 Transfer Cancelled or Rejected

After an activity reassignment /inventory transfer has been initiated ('Reassign' / 'Transfer' option has been chosen and 'Send' button has been clicked), the sender can at any moment Cancel the reassignment/transfer (Figure 61).

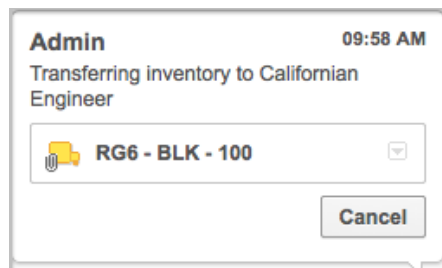


Figure 61: Canceling the transfer

After an activity reassignment/inventory transfer has been started ('Reassign' / 'Transfer' option has been chosen and 'Send' button has been clicked), the recipient will see the basic details of the activity/inventory and can either accept or reject the reassignment/ transfer.

If the recipient makes no choice for a significant period of time or if the user has accepted the operation but it cannot be completed for too long, it will fail due to time-out.

Reassignment / Transaction will also be automatically cancelled if the sender or the recipient leaves, or a new contact joins the chat before its completion.

7 Helpdesk

Helpdesk Window has been designed for helpdesk operators. You will see this window only if you have helpdesks assigned to you. In that case, an additional bubble will appear, right next to Community (Figure 62).



Figure 62: 'Helpdesk' icon

7.1.1 The Helpdesk Window. Header.

The window header consists of the name and the Menu Icon (Figure 63).



Figure 63: Helpdesk Header

7.1.2 'Helpdesk' Window. List of helpdesks.

This section reflects all helpdesks that one manages as well as the requests awaiting answers (Figure 64). The helpdesks are highlighted in grey. The number in parenthesis next to the name of the helpdesk indicates the number of pending requests along with the time that has passed since the request appeared.

The request itself is displayed under the list of the managed helpdesks.

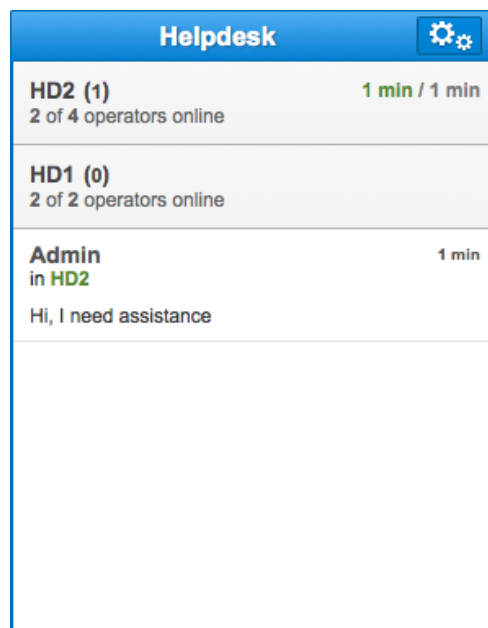


Figure 64: List of Managed Helpdesks

The operator does not initiate conversations, he responds to questions that come into the helpdesk. In order to start participating in the conversation, the operator needs to acknowledge the request. This can be done by clicking on the message, and once the new window pops up, click Take Chat (Figure 65).

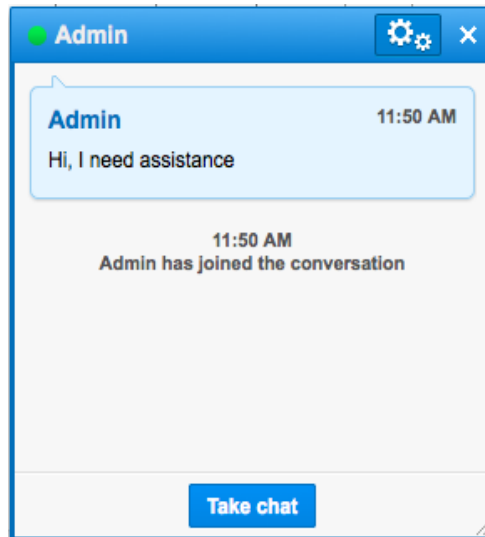


Figure 65: Accepting the chat

Until the operator takes the chat, it will not be acknowledged and the time next to the request will turn red after the threshold is exceeded. The time displayed after the slash is the average waiting time in all active chats (Figure 66).

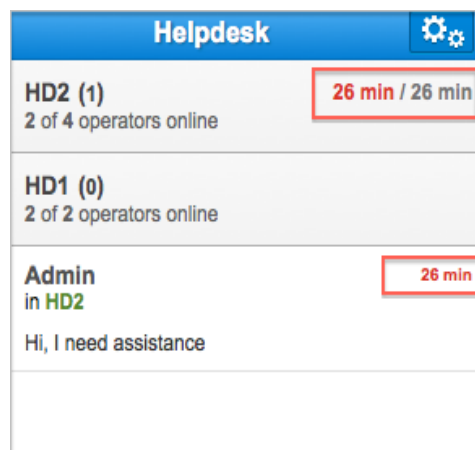


Figure 66: Request pending time

Before the request has been acknowledged, the user seeking assistance will see an envelop icon next to the request (Figure 67).

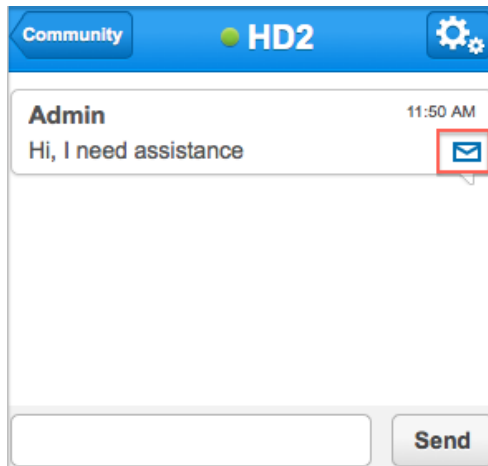


Figure 67: Awaiting Assistance

Once the operator clicks Take Chat, the conversation is considered acknowledged, and the operator can proceed with answering the question (Figure 68).

Once the conversation has been acknowledged it is transferred to Community.

Meanwhile, the user who requested assistance, will also be notified.

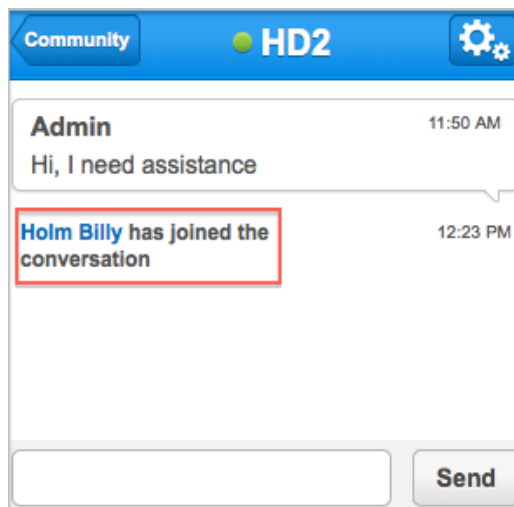


Figure 68: Operator has joined the conversation notification

7.1.3 'Helpdesk' Window. Transferring Conversations

In order to transfer the conversation to a different operator/helpdesk, go to the menu located in the top right corner and select transfer conversation (Figure 69), then choose the appropriate helpdesk (Figure 70).

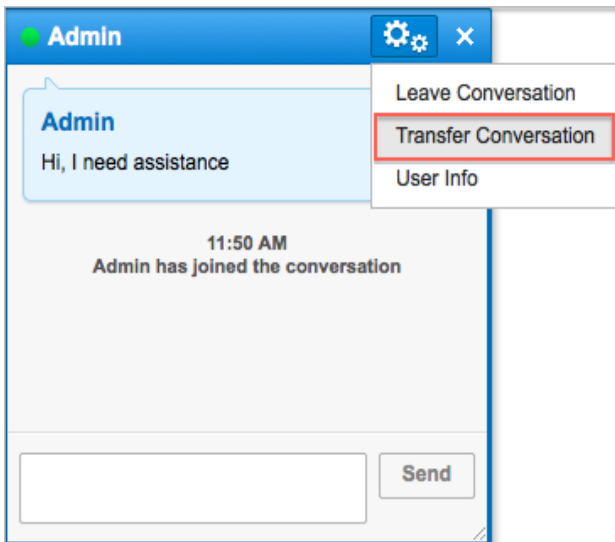


Figure 69: Transferring conversation

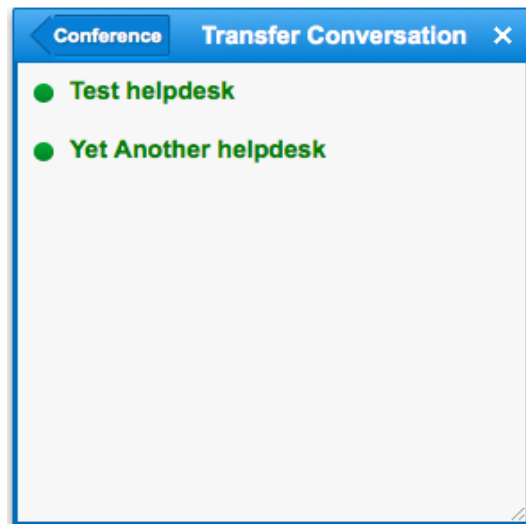


Figure 70: Selecting helpdesks

You will also be asked to provide a reason for transferring a conversation and whether you want to remain its participant after the reassignment (Figure 71).

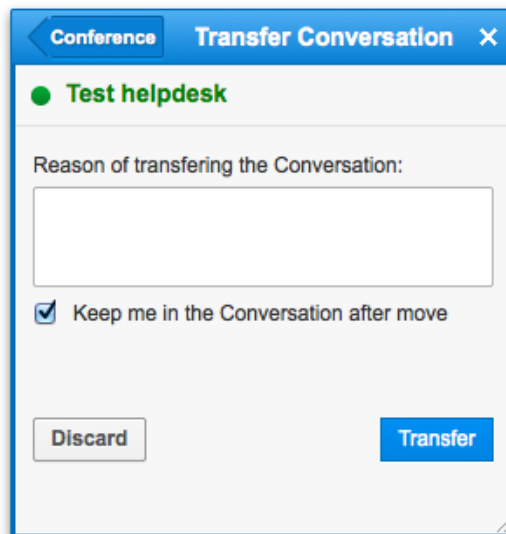


Figure 71: Transfer Confirmation

You can also invite other users into the conversation. To do that please follow the steps as described in section [4.3](#) of this document.

7.1.4 'Helpdesk' Window. Leaving a conversation

If you are the operator and you wish to complete the conversation, all you need to do is go to the menu and select Leave Conversation (Figure 72). Remember that you won't leave the conversation by just

pressing the X at the top corner, this will not disable the conversation, but merely hide it.

If a user you're talking to wants to reopen the issue all they need to do is just type a new message into the existing chat with the Helpdesk operator. His request will be considered as new and will be answered in the order that it was received while keeping all of the previous messages.

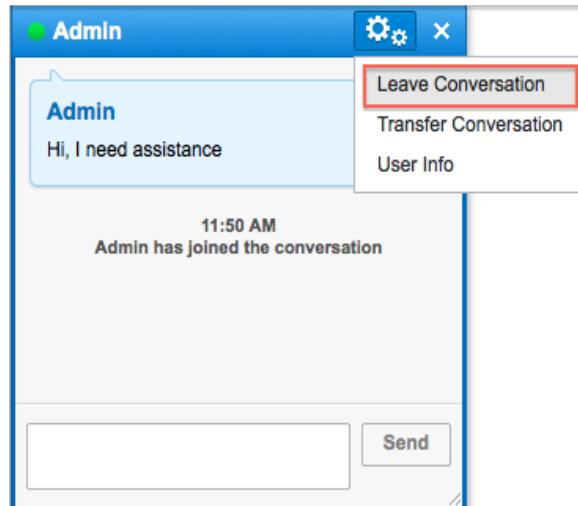


Figure 72: Leaving the conversation

7.2 Other Helpdesks

If the operator does not have any pending requests for assistance, he can help out with chats in progress from other helpdesks and operators.

In order to view the chats in progress, click on the settings icon and select chats in progress (Figure 73).

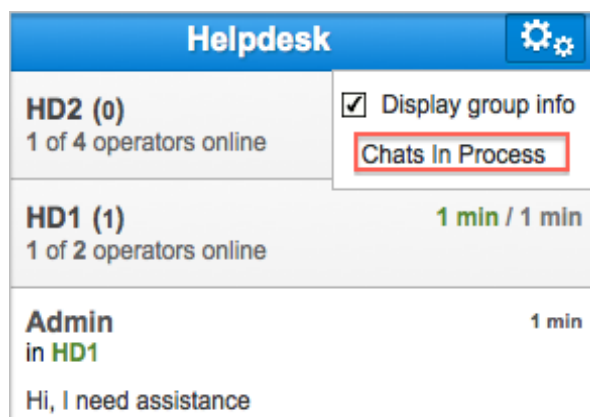


Figure 73: Chats in progress

The information on all chats in progress will appear.

8 System Settings that May Influence Contact Awareness Functionality

8.1 User-Resource Association Restraint

ETAdirect allows one user to manage several resources (e.g. dispatcher can manage several engineers) and one resource may be managed by several users (e.g. a technician may be managed both by a user, who is also a technician, and by the dispatcher).

For SmartCollaboration there is an additional one-to-one association defined between User and Resource (so, for example, when you assign an activity to a resource in the system, there is a specific community user associated with the resource, who will be physically performing it).

If such association is not defined, it is impossible to start a conversation with the User from the resource/activity hint and/or to reassign activity and transfer inventory to the Resource via SmartCollaboration. It is necessary to contact your system administrator to check the issue.

8.2 Reassignment/Transfer Constraints

Activity can be reassigned only if permissions for activity move are granted to the User in ETAdirect. This means that if a user is not permitted to move activities in the List View, the User will not be able to move activities in SmartCollaboration either.

Since inventory can only be transferred with SmartCollaboration, a special permission has been created at the configuration level, so the ability of a User to move inventory has to be implemented by the TOA's support team upon the Client's request. Only Resource inventory can be transferred.

User-Resource Association must be defined to enable an activity reassignment/ inventory transfer to the user.

8.3 Other Issues

If you do not see 'start conversation' action in the hint of a resource of activity, this may mean that the hint has not been added to the hint context, or there is no user-resource association defined between the resource to the hint of which you've referred.

If there are no details of a resource, then they are not defined in the *Resource details in chat* context or the fields defined for the context are not filled for this specific resource.

If activity name is not associated with the icon, the *Identify activity by* context is not defined. If there are no activity details, they are not defined in the *Activity details in chat* context or the fields defined for the context are not filled for this specific activity.

If inventory name is not associated with the icon, the *Identify equipment by* context is not defined. If there are no details of an inventory, they are not defined in the *Inventory details in chat* context or the fields defined for the context are not filled for this specific inventory.