To access online: http://www.workybe.com/knowledgebase/

How to create a ticket?

Tickets are the work orders you'll be using in the system. We have 2 ways to create a ticket which are ticket page and calendar.

- Click the "Create Ticket" button on the right top corner or drag your mouse on the left sidebar and click "Ticket".

- When a new bar opens on your right, write the

  Subject: This is the name of the ticket, you'll be seeing a ticket by this name in Calendar.

  Assignee: Assignee is the person who'll do the work order.

  Due Date: You'll see the Ticket on this date in the calendar.

  Description: Description may help you to give details about the work order.

  Files: Attach the documents that will help to explain the work order.

  Definitions: You can create definitions on the Definitions page. Definitions are used to defining. i.e. ticket, product, or demand.

  States: States shows the progress of the work order.

- When you're done, click the "Create" button on the right bottom corner.

How can I find my ticket?

- Click the search bar at the top.

- Write the ticket number, select the "Ticket" and click "Search"

How to add effort into a ticket?

- After you found your ticket on Calendar, click on it.

- You can click "Start" to start a work order.

- Also, you can click “Effort Details” and see past efforts.
- Drag your mouse on the left sidebar and click “Tickets”.
- Click the “Start” button on the Ticket’s row.

How to use the Calendar?

- You’ll be seeing the calendar on your home page or you can drag your mouse on the left sidebar and click “Calendar”. You can:
- See all of the planned work and tickets.
- Change the due date by drag and dropping a ticket.
- Click a slot and create a new ticket due to the day you clicked.
- Click on a ticket and see all the details of the ticket.
- List and reach your tickets.
- Choose to see your Calendar monthly, weekly, daily.
- Click “Agenda” and see all of your tickets, listed by date.
- Choose your own listing type and list the tickets by city, district, team or person, states, or date.

Creating tickets on Calendar.

- You’ll be seeing the calendar on your home page or you can drag your mouse on the left sidebar and click “Calendar”.
- Click the “Create Ticket” button on the right top corner or drag your mouse on the left sidebar and click the “Ticket” button.
- When a new bar opens on your right, write the Subject, Customer, Assignee of the ticket, and choose the due date. You can write a description and attach documents if you choose.
- If you’d like to add more details, click the “More detail” button and write the details.
- When you’re done, click the “Create” button on the right bottom corner.

How can I list my next work orders?

- You’ll be seeing the calendar on your home page or you can drag your mouse on the left sidebar and click “Calendar”.
- Click “Agenda” to see your next work orders/tickets.
- You can view your work orders monthly, weekly, daily views.

What do colors mean on Calendar?

- Colors help to see the progress of the ticket. You can decide any color and name progress types by your choice.

What is the purpose of definitions?

- Definitions help to specialize the work orders.

Creating a definition and group?

- Drag your mouse on the left sidebar and click “Definitions”.
- Click “Create Definition.”
- Choose a group from the bar. If you need to create a new group, you can write the new group's name and then click "Create a new group."
- Write a name, add custom attributes: key and value. You can click the “+” button and add new custom attributes.
- When you’re done, click the “Create” button on the right bottom corner.

Editing definition.

- Drag your mouse on the left sidebar and click the “Definition”.
- After choosing the definition you’d like to edit, click “Show Details” on its row.
- Edit names or states.
- Set the states with states toggle.

What is the purpose of the States?

- States help to see a ticket’s current situation.

Creating States.

- Drag your mouse on the left sidebar and click “States”.
- Click “Create States”.
- Write the name, previous state, a new state, SLA duration, and choose the color of the state.
- You can choose to send an e-mail or SMS
- When you’re done, click “Create Role!”

Editing states.

- Drag your mouse on the left sidebar and click “States”.
- Click the State you’d like to edit.
- You can edit the name, write next or previous states, change the color.
- Click “Edit States!”.

Roles

- Roles help you to define a person’s position at work. You can determine to give or take back permissions to a Role.

How to Create Roles?

- Drag your mouse on the left sidebar and click “Roles”.
- Click “Create Role”.
- Write a role name.
- You can decide what Role can or can’t do on the opening page. Click and choose the Role’s Permissions.

What is Permissions?

Permissions help you to decide what Role can or can’t do. You can give your Roles permission to create, edit, or delete.

Permission Types

There are three types of Permissions.

- ServisSoft Permissions
- Portal Permissions
- Mobile Permissions

You can give permissions to create, edit, or delete tickets on these platforms separately. i.e. one role can create tickets on ServisSoft and Mobile but can't create them on Mobile.

How to edit my profile?

- Click the profile image on the right top corner.
- Click the "Edit my Profile" button on the left top corner.
- Change the fields you'd like to.
- Click "Save Changes".

How can I change my Password

- Click your profile image on the right top corner.
- Enter your current password to the first bar.
- Write your new password to the required fields.
- Click "Save Changes".

How to Change Language?

- Click the profile image on the right top corner.
- Click TR or ENG (you will see the language you don't use in the current version as an option) button and change the language to TR or ENG.

How to create Users and Teams?

- Drag your mouse on the left sidebar and click "People & Teams".
- Click "Create User" on the right top corner.
- Fill the required fields: Name, surname, email, phone number
- Select the user's role and team. If you need to create a new team, you can write the new team name and create a new one.

- Click “Save”.

What is Team purpose?

- Creating Teams can help you to gather people on the same departments or people who are working on the same projects etc.