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# Agency Communications Tickets – User Guide

Calero.com for VITA

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# Agency Communications Tickets

## Intended Audience

- Agency

Each type of communications ticket is configured for specific cost centers and Security Groups; a user's assigned cost center will determine if that user has access to view and/or edit communications tickets.

## Reasons to Create Agency Communications Tickets

Agency Communication Tickets should be created for non-procurement related issues such as:

- General Inquiries
- How To questions
- Rebill support
- Reporting requests

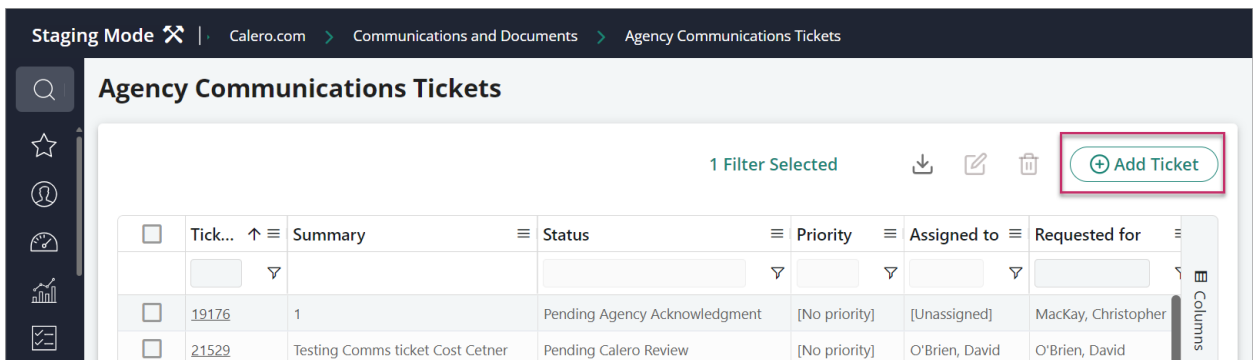
## Reasons Not to Create Agency Communications Tickets

Do NOT create **Agency Communications Tickets** for provisioning issues.

- Create a **Wireless Consulting** ticket (I Want To section of the Mobility Portal) to address Wireless (Mobility) Provisioning issues.
- Create a **Wireline Consulting** ticket (Workspace > My Procurement Portal) to address Wireline Provisioning issues.

## Create a Communication Ticket

1. Go to **Communications and Documents > Work Queues > Agency Communications Tickets**.
2. Select **Add Ticket** to create a new ticket.



3. Fill in the fields in the **General** section:

Calero.com > Communications and Documents > Agency Communications Tickets > Add Ticket

Add Reference ▾ Save ▾ Cancel

Communications and Documents - Agency Communications

General

Summary\*:

Requested for\*: TEST, Sally 🔍

Assigned to\*: [Unassigned] 🔍 Cost Center\*: [Unassigned] 🔍

Secondary Contact:

Secondary Contact Email:

Description:

Requested Due Date:

References

There are no references for this ticket.

Attachments

- **Summary** – Enter a summary for your request.
- **Requested for** – Your name is populated by default—do not change.
- **Assigned to** – [Unassigned] is populated by default—do not change.
- **Cost Center** – Select the Cost Center that aligns to agency associated with the submission of the request. There are 2 ways to select your cost center:
  1. You can do this by typing ahead and selecting the correct option like this:

Cost Center\*: 123999 🔍

123999

2. Or, you can use the magnifying glass to open search, like this:

Cost Center\*: [Unassigned] 🔍

Then, enter search criteria, select **Search** button, and then select the Cost

**Center.**

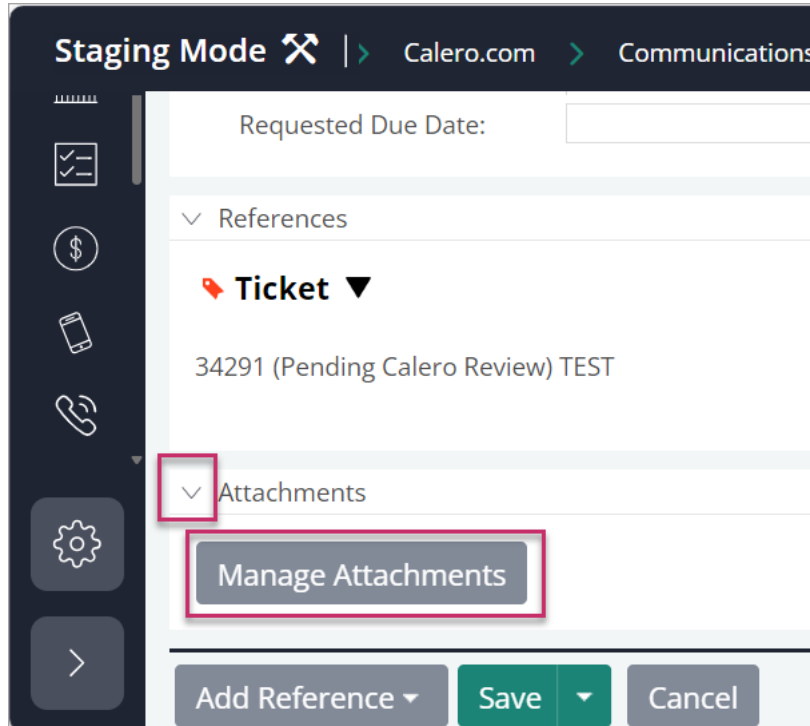
- **Secondary Contact/Email** – Name/email of a secondary contact in case the requested-for user is unavailable.
  - **Description** – Fill in all the details about this communication.
    - ***This is the most important field on this ticket!***
    - Enter as much information as you can.
    - Please provide your phone number if you wish to be contacted directly by phone
  - **Requested Due Date** – Date you need a resolution by. Can be left blank.
4. (Optional) **Add a Reference** to link this ticket to another ticket.

a. Select **Add Reference > Ticket**.

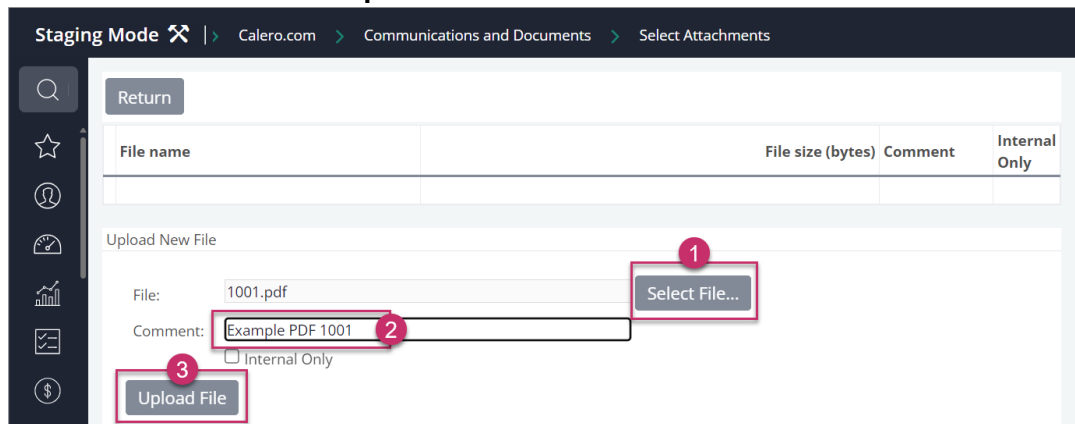
b. Search for and select the ticket.

5. (Optional) **Add an Attachment** to include a document with this ticket.

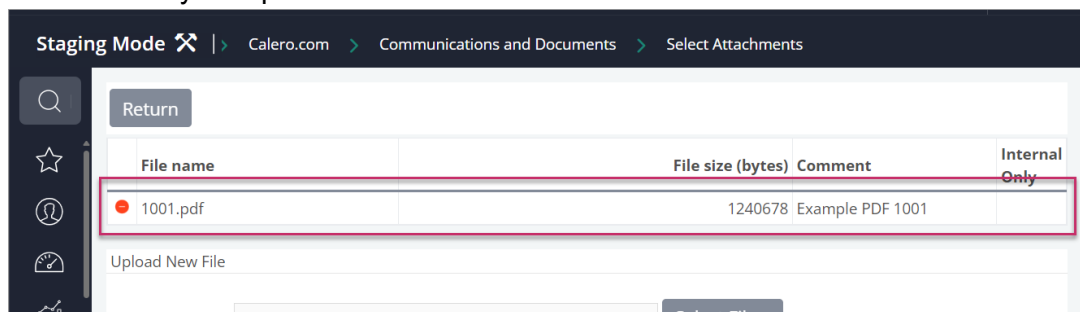
- a. Expand the **Attachments** section and select the **Managed Attachments** button.



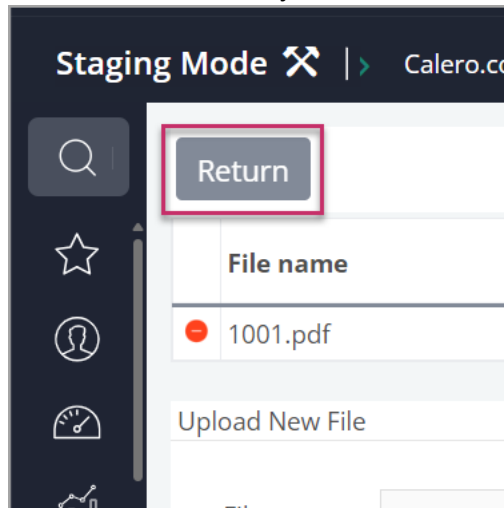
- b. Click the **Select File** button and select the file from your browser, then enter a **Comment** and select the **Upload File** button.



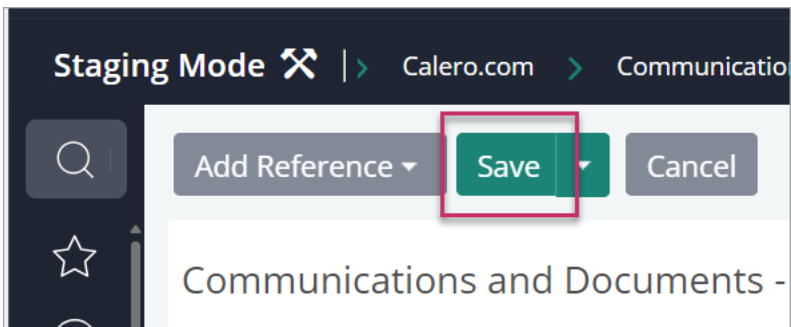
- c. A dialog box will say "The file was successfully updated" in the right-hand corner.  
 d. You can see your uploaded file here.



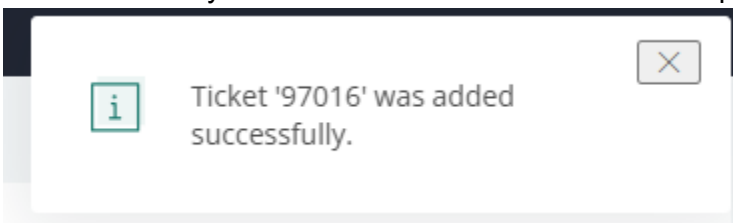
- e. Select **Return** when you're done adding attachments.



6. Select the **Save** button to submit the ticket.



- o You also have the option to:
    - **Save > Save and go to Detail** (which saves your changes and then shows you the ticket).
    - **Save > Save and go to Edit** (which saves your changes and then allows you to keep making changes to this ticket).
7. Once saved, you will receive a notification in the top right corner that shows your ticket was successfully created. The ticket is now in Calero's queue to be worked.

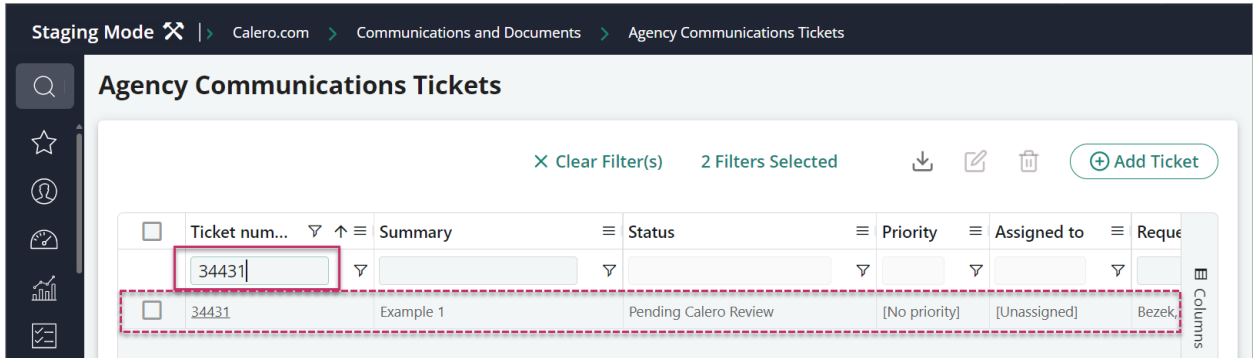


## Find and Action Existing Tickets

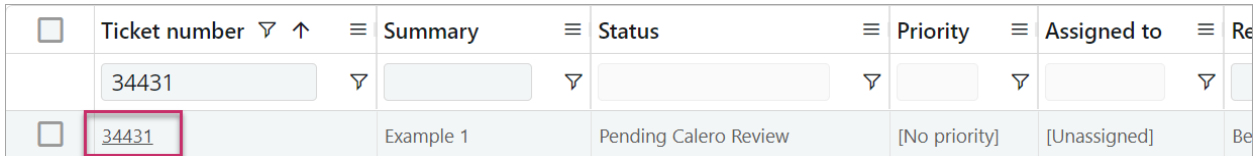
There may be times you need to find existing tickets, perform additional actions, and/or move the ticket on to the next step in the workflow.

1. Go to **Communications and Documents > Agency Communications Tickets**.

- Use the filters to help you find the ticket you're looking for.

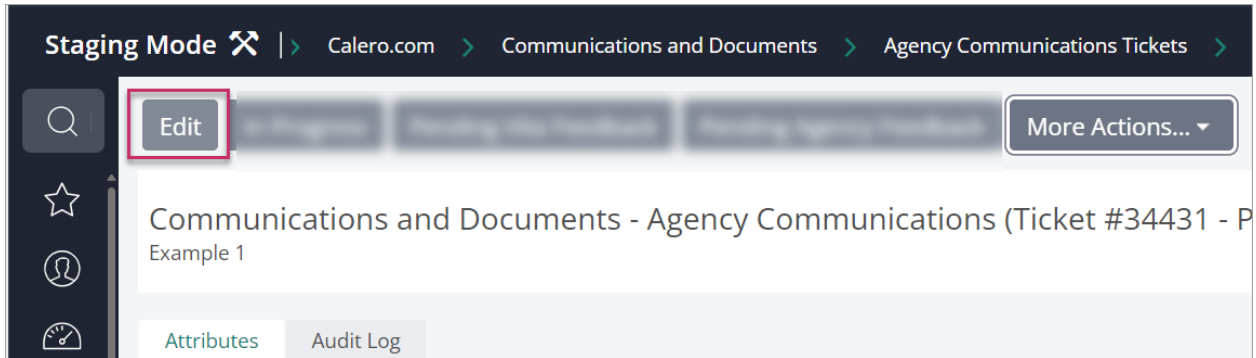


- Select the **Ticket number** to access the ticket.

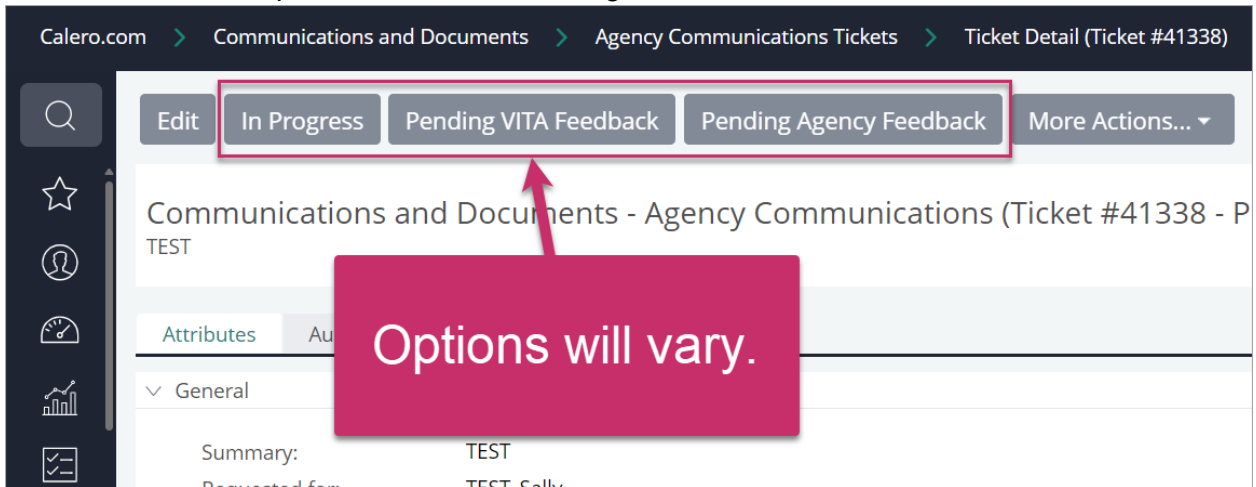


Then, depending on your security group/role and the status of the ticket, you may be able to:

- Edit** the ticket.

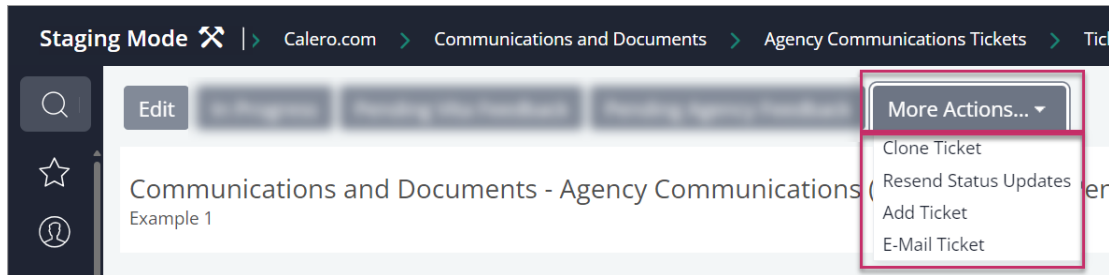


- Use buttons at the top to move the ticket through the workflow.



- The buttons available depend on your role and this ticket's place in the workflow.

## 6. Take **More Actions**:



- **Clone Ticket** – Creates a new ticket with information from the original ticket.
- **Resend Status Updates** – Sends a status update to the external system configured to receive updates when the ticket undergoes status changes.
- **Add Ticket** – Creates a brand-new ticket.
- **Email Ticket** – Sends the ticket to the recipient(s) configured. Includes additional configurable information such as subject line, email message, and attachments.

## 7. Make sure to **Save** your changes.

# Appendix

## Other Communications and Documents Menu Items

Security groups/roles determine the contents a user can/cannot see and the actions they can/cannot take. The Communications and Documents menu may also include additional options.

- **Communications and Documents > Work Queues > Documents Tickets** – Used for Wireline Bulk Ordering and Mobility Batch Processing.
  - For more information, refer to the following user guides:
    - *VITA - Wireline Ordering\_My Procurement Portal and Bulk Ordering\_User Guide*
    - *VITA - Mobility Batch Processing\_User Guide*