Support Portal Gemini

ICREATIVE

PART OF 4CEE

Contents

DOCUMENT HISTORY

Version	Date	Author	Remark
1.0	17-08-2015	Paul van der Veer	Initial version
1.01	7-9-2015	Jan Dekens	English Version
1.02	8-9-2015	Paul van der Veer	Print-screens English
1.03	7-8-2018	Paul van der Veer	Change telephone number
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1.05	07-07-2020	Paul van der Veer	Disclaimer added
1.06	17-07-2020	Paul van der Veer	Lay-out changes
1.07	19-02-2021	Erik Vossers	Content revision
1.08	6-8-2021	Kees Hakvoort	Renew images due to new Gemini version
1.1	11-11-2021	Sjoerd van den Top	Updated Images due to New Company colours and logo
1.2	19-10-2023	Paul van der Veer	Changing register procedure
1.3	17-06-2024	Paul van der Veer	Changing link Guidelines Support Prioritization

1. Introduction

This document is a basic instruction on how the ICreative support portal "Gemini" is used. The tool is used to register tickets and activities for both implementation/upgrade projects and ongoing customer support.

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Phone: +31 (0)318-493151
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2. Register and personal settings

In order to access the portal, you need a personal account to log in. This chapter describes how to register and which personal settings can be configured.

2.1 Register

To register, a ticket needs to be created in Gemini with a registration request. You'll need to request this through someone from your organization that already has an account in Gemini or through the "Teamlead Projects" from ICreative.
The registration request needs the following details: First Name, Last Name, email address and for which Project(s) you want to have access.

When your account has been created you get an email which includes the procedure to login.
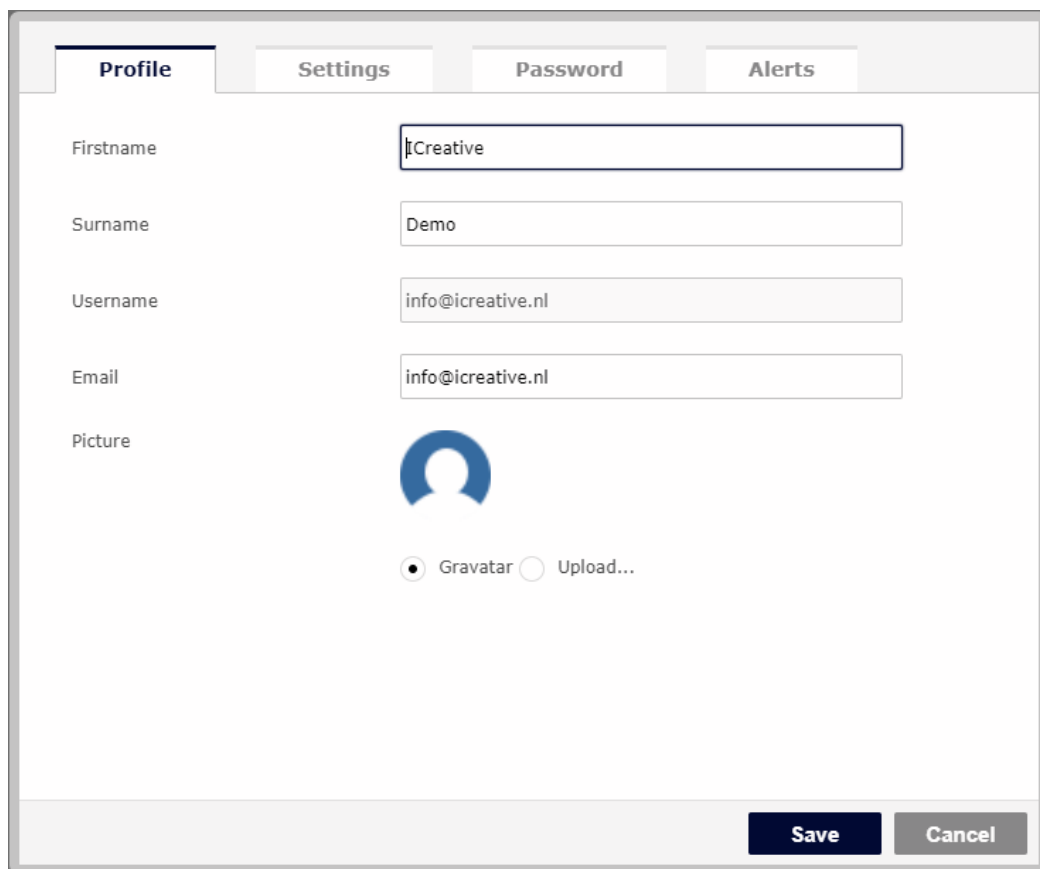
2.2 Personal Settings

To change your personal settings, hover over your user name in the top right of the screen and select the top menu option [Profile] to access the settings.
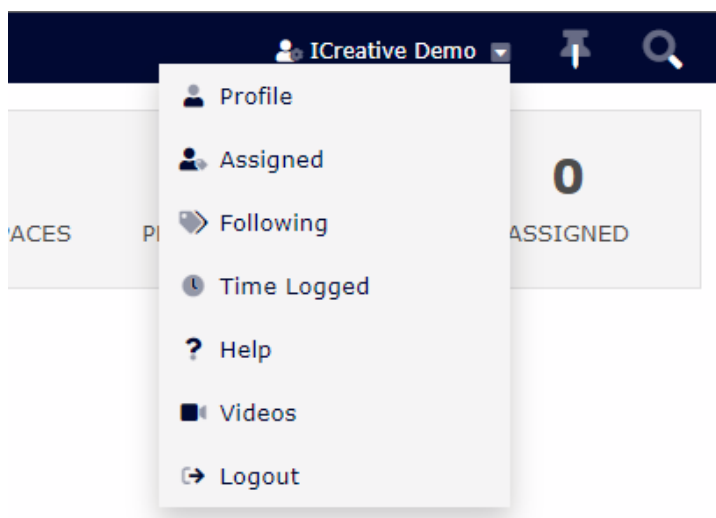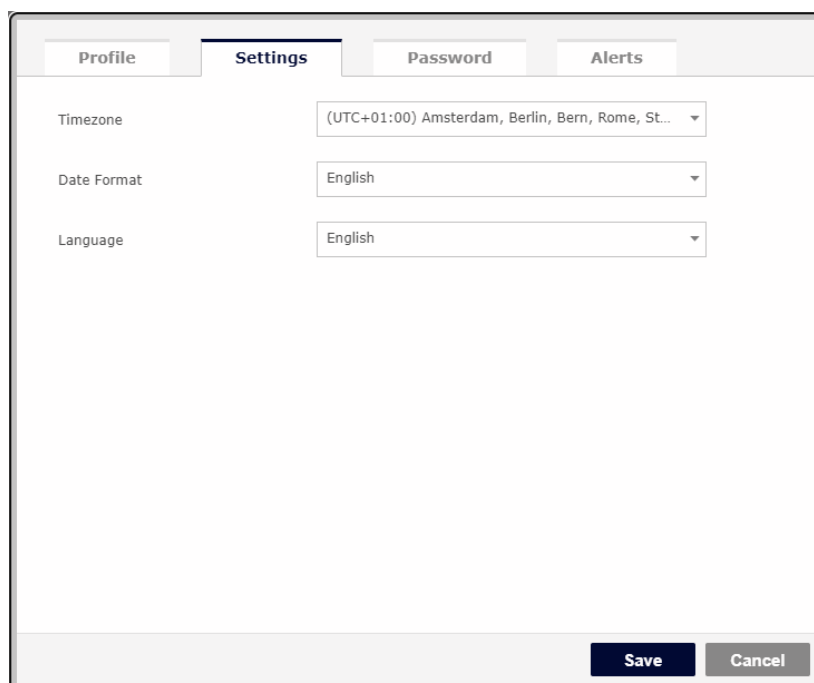

The [Profile] screen allows you to edit:
- Your personal details
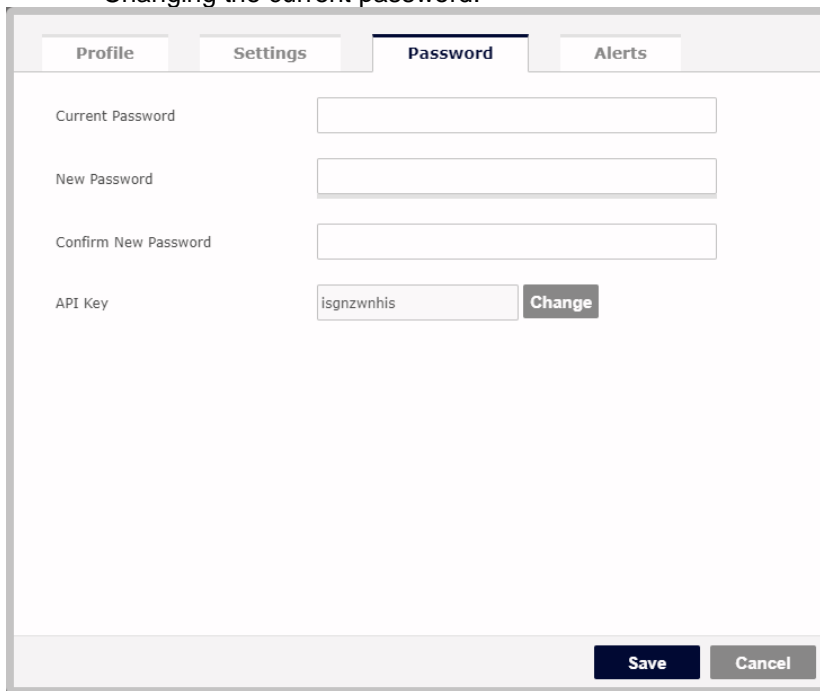
- Your localization settings

You can change the Date Format and Language to the desired format, however ICreative recommends to use either English or Dutch.
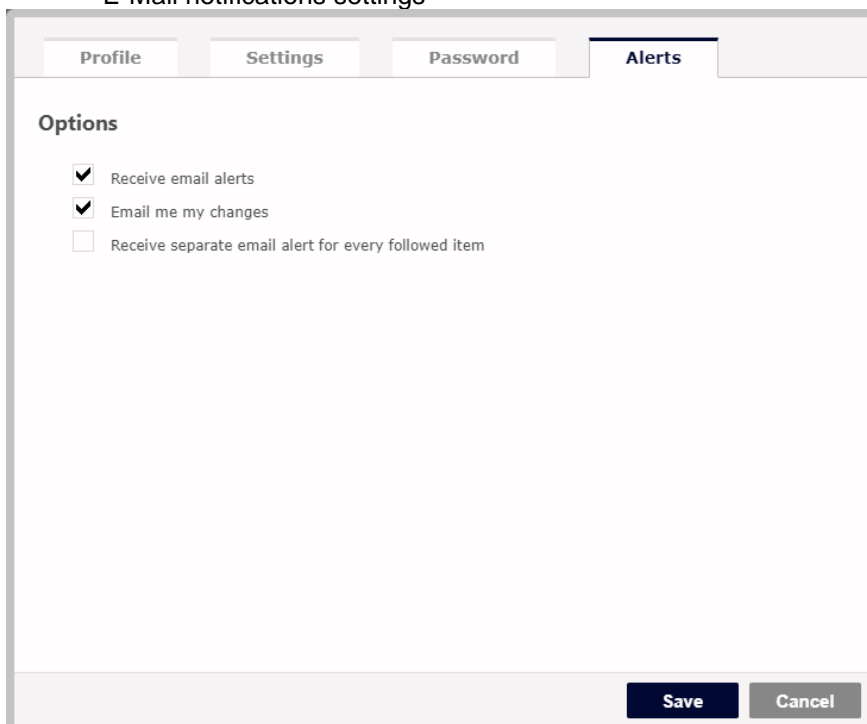
- Changing the current password:

- E-Mail notifications settings

3. Creating and managing tickets

3.1   Creating tickets

To raise a new ticket, click on the [Add] button:
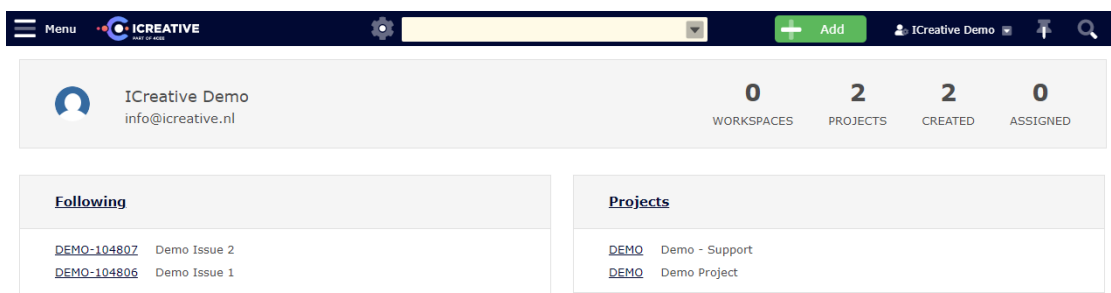
The following screen will pop-up:
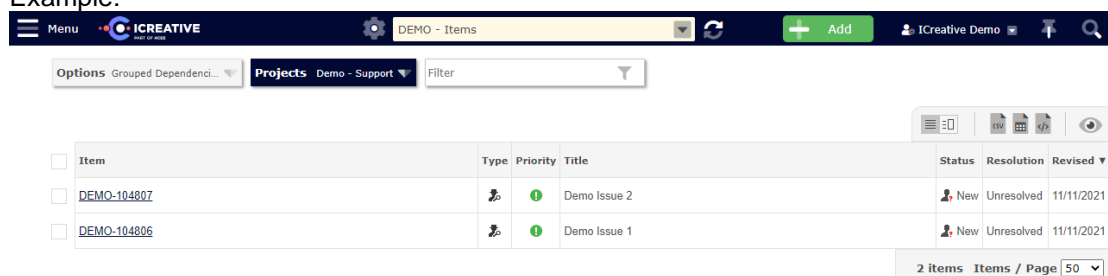
Fill in the fields on the form.
- **Project**: A list of projects you have access to, please make sure to select the correct project to prevent delays in processing.
- **Type**: This helps us to distinguish issues from change requests.
- **Title**: a short description of the issue.
- **Description**: Please enter a detailed description of your case with as much information as possible. It is also possible to add additional information such as screenshots, logfiles, etc. to elaborate on the description.
- **Product**: Please select the product your ticket is regarded to.
- **Priority**: Please assign the priority based on the "Guidelines Support Prioritization" document available on our website.
- Attachments: Add your attachments to a ticket.

- *Please note it is possible to add multiple attachments at once, in order to do this, use the Windows multi-select (Ctrl + click) option in the browser form.*

If your ticket is completely filled out, click [Add] to submit.

3.2   Changing tickets

When you open the Dashboard and select one of your projects, you will get an overview of all open tickets related to this project.
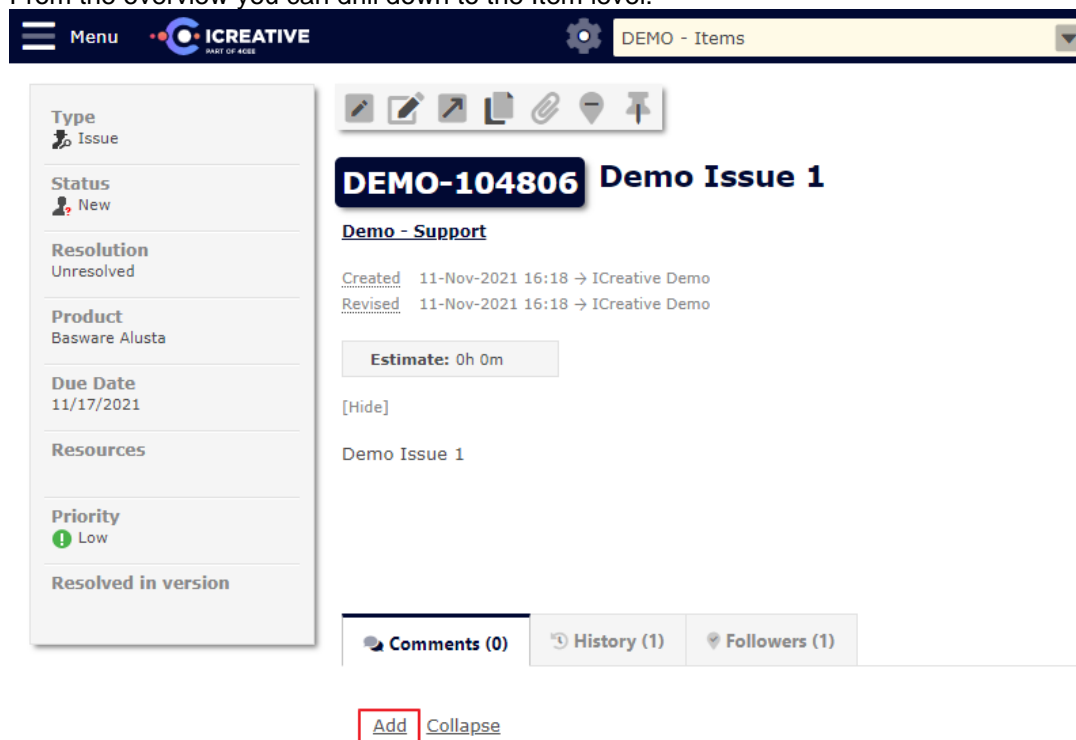
Example:

From the overview you can drill down to the Item level:

On the left side of your screen the header details are shown.
By clicking on a field, it will become editable – allowing you to change the value.

To add a comment, click [Add] in the [Comments (*n*)] tab. You can add text and attachments as a comment.

Additional information such as the ticket [History (*n*)] and [Followers (*n*)] is available in the respective tabs.

On Item level, additional options are available in the top of the screen:

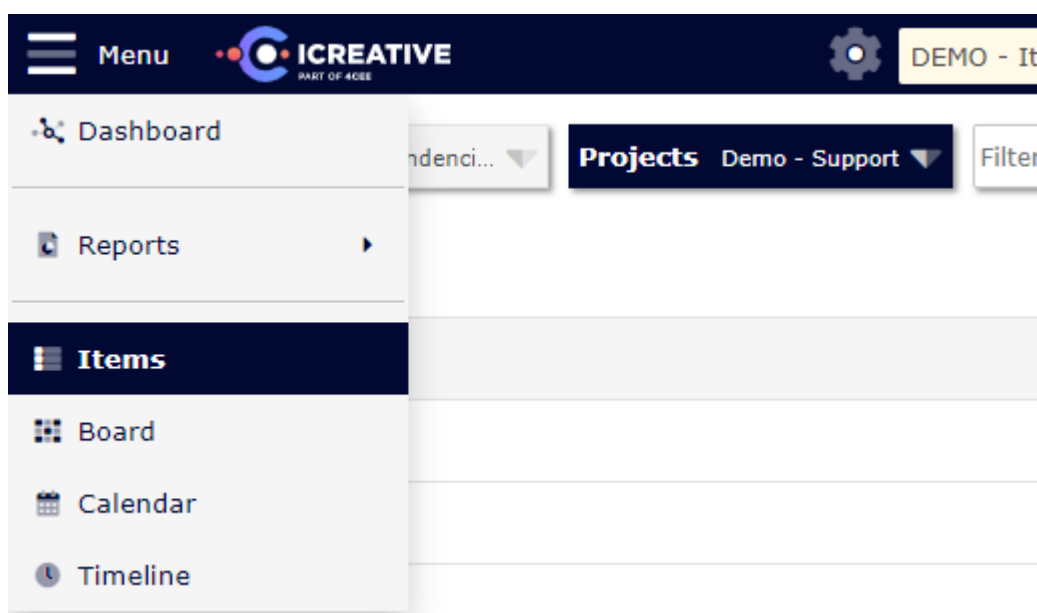
= Change a ticket

= Change the description of a ticket

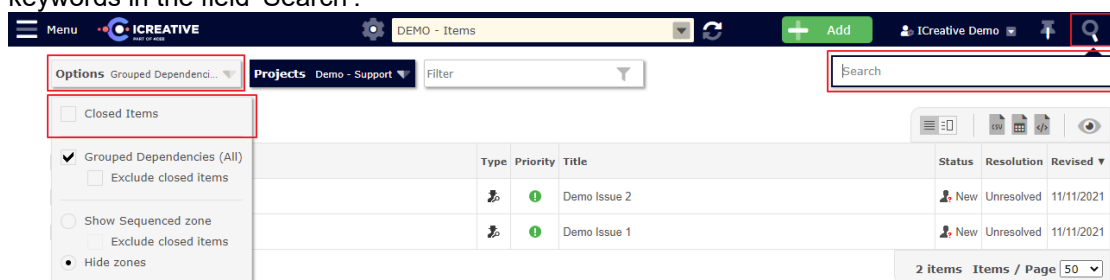= Add an attachment

= To follow or unfollow a ticket.
If you follow a ticket, you will receive an email with every change regarding this ticket.

3.3   Searching tickets and closed tickets

In the [Items] overview of tickets [via click on Menu] in a project,

And you hover above on the top right of the screen, you can search for certain keywords in the field 'Search'.
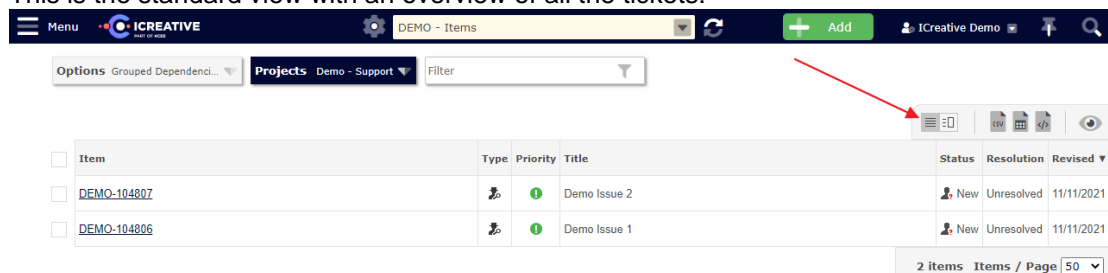

Closed tickets can also be displayed in the search results by selecting 'Include closed items' in [Options] on the top left.

3.4   The display of tickets and viewing multiple tickets.

In the project overview of all the tickets you can select two types displays views:

First view:
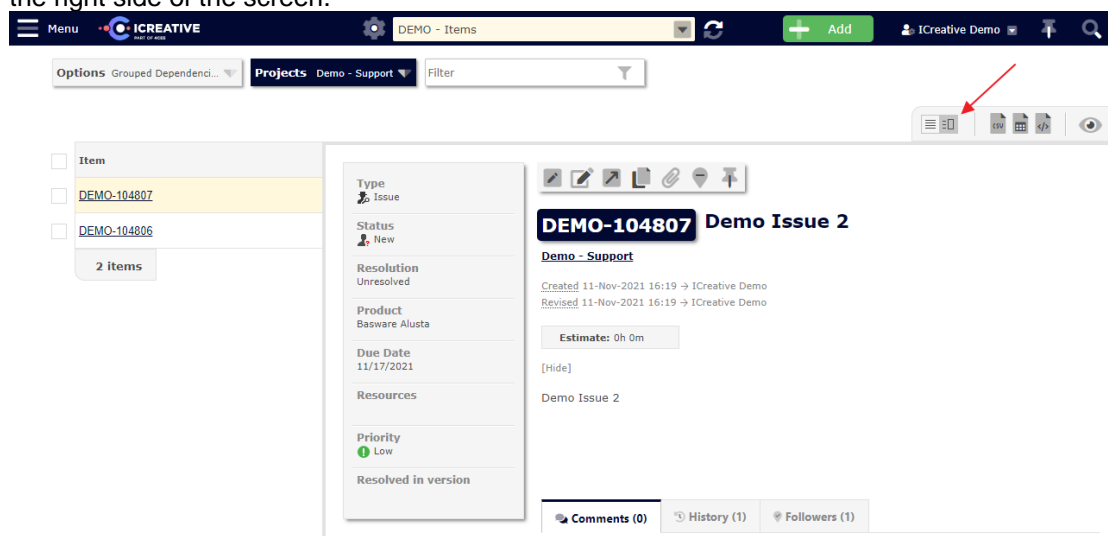This is the standard view with an overview of all the tickets:

Second View:

In this view, all the details of a ticket will be shown of the ticket that is at the top of the list on the right side of the screen.
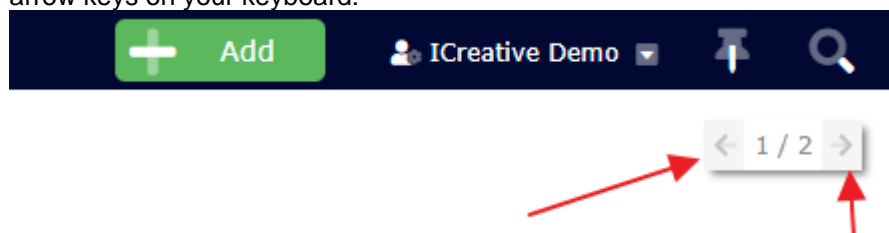

You can switch between details of tickets by selecting another ticket using your mouse or the arrow keys on your keyboard:

When you would click on the arrows next to "1/2' you will start to switch between tickets. If you would click on '1/2' you are send back to the original overview you were working in.

4. Creating and managing Workspaces (views)

4.1 Creating a Workspace (view)

You can make workspaces within Gemini. A workspace is a certain view of a project where you can select specific settings to view all relevant information in a wink of an eye. In a workspace you can select the desired columns and filters. These you can save and start using every time you log in to Gemini.

How you can create a workspace:

Click on the icon and click 'New Workspace'.
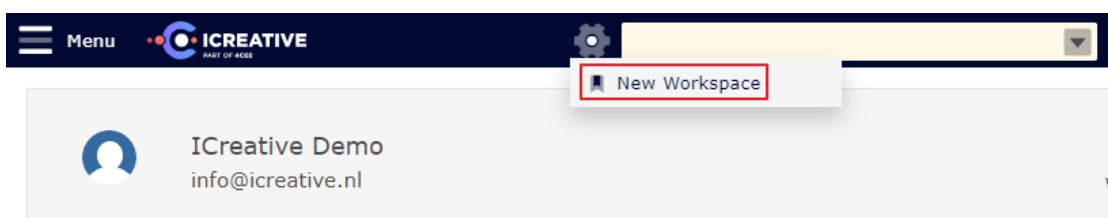
The following screen will be shown:

The first field will be the short code that you can give to the workspace.

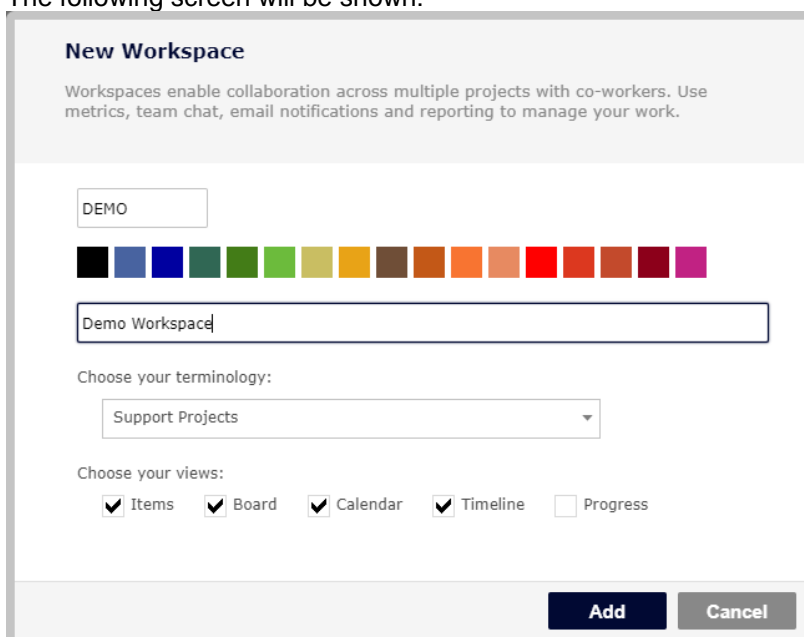The second field is the description for the workspace.

"Choose your terminology": - Please select for Support: "Support Projects",
For other projects you can select "Customer Project".

Lastly, you can add the desired views by selecting them. 'Items' is the most common one.

Please click on button [Add].

The Workspace has been made and is viewable on the top middle of the screen.
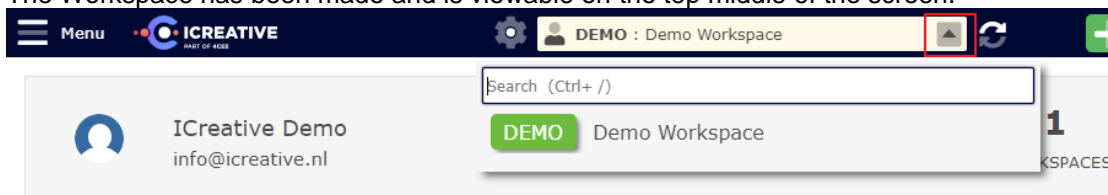
You could, for the same project or even for multiple projects, make several workspaces which can show specific views that you can select.

4.2   Changing columns and filters within the workspaces

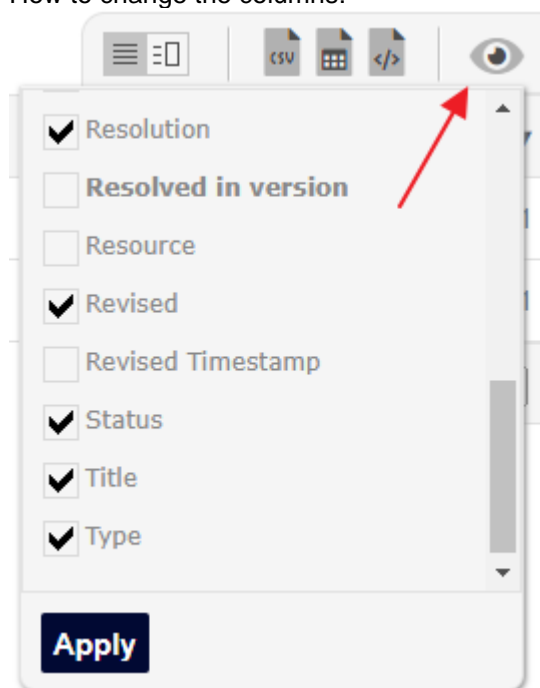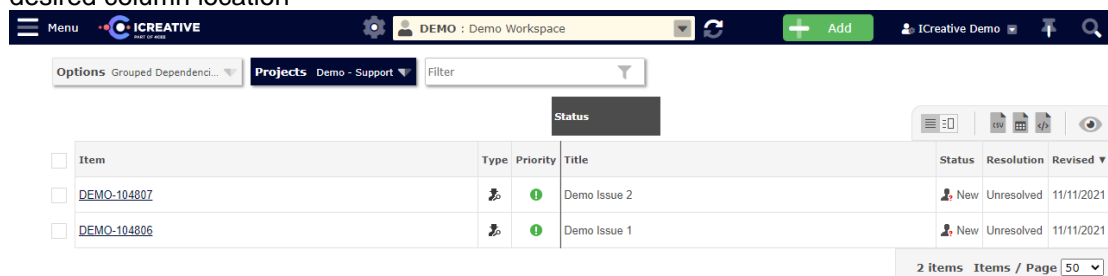Select the appropriate Workspace (on the top middle of the screen) [click on ⬇] and you can change the columns and filters by clicking on 👁

How to change the columns:

Click on the columns that are shown above or otherwise desired. Click on button [Apply].

You can change the order of the columns by clicking and hold on a column and drag it to the desired column location
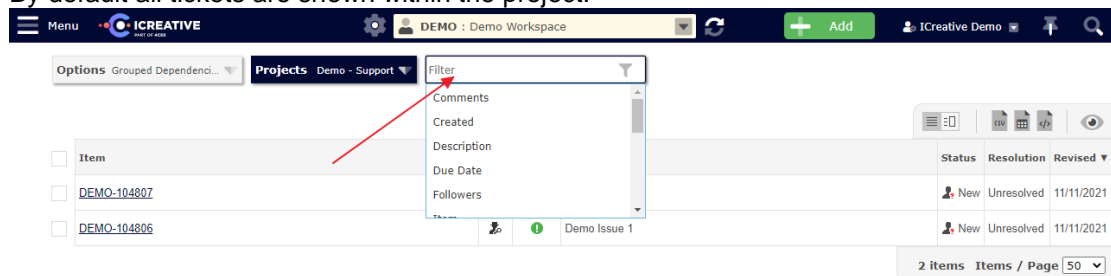

All your changes are automatically saved to the Workspace.

Changing your filters:

Within a workspace, you can filter on the available fields.

By default all tickets are shown within the project:

By clicking in the field [Filter], search for a field or add a field to the filters.

You can delete fields that are used for filters by clicking the 'X' on the right side within the field.

## 4.3 Copying, deleting and changing settings in your Workspaces

When clicking on the icon, you can copy, delete or change all the settings of the created workspaces. Please use the appropriate menu selections.
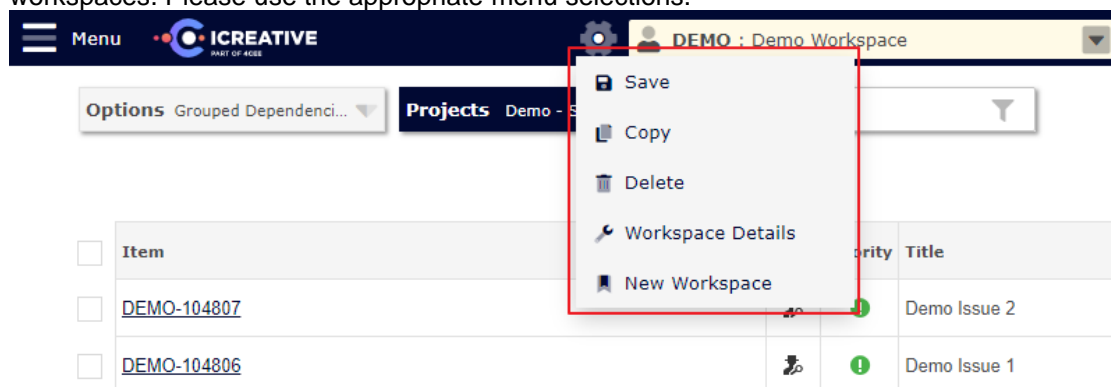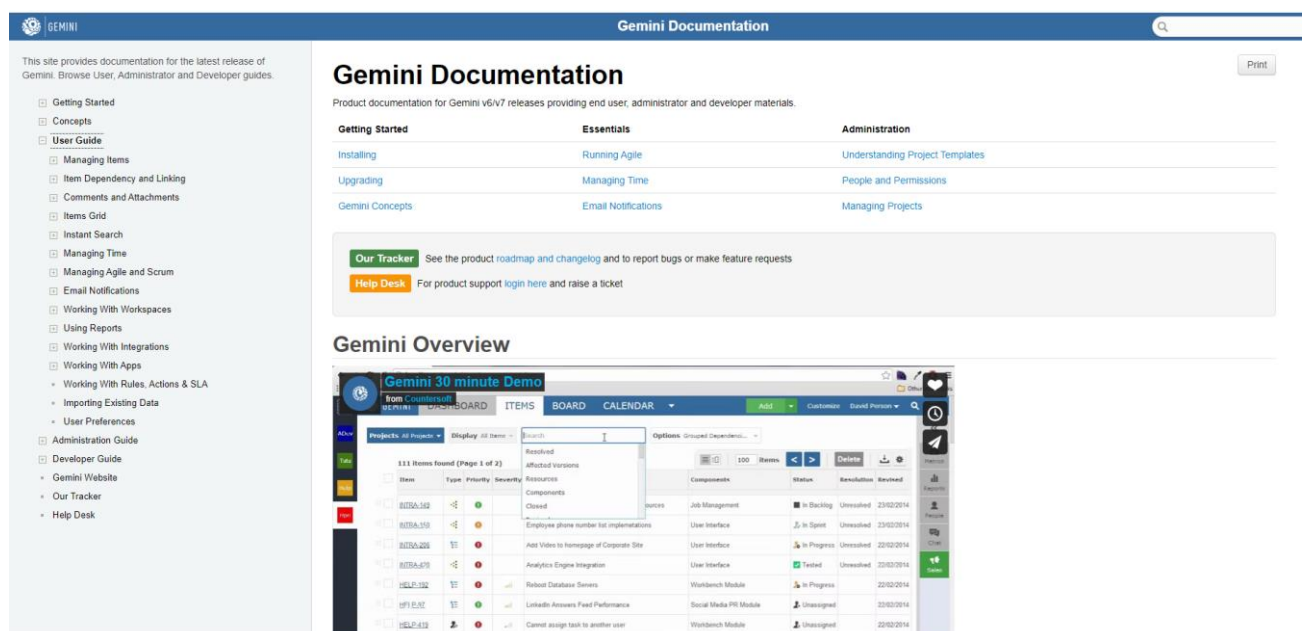
5. Additional Information

5.1 The help functionality

You can read the extra help functionality by clicking the icon next to your username and then [Help] in the menu.
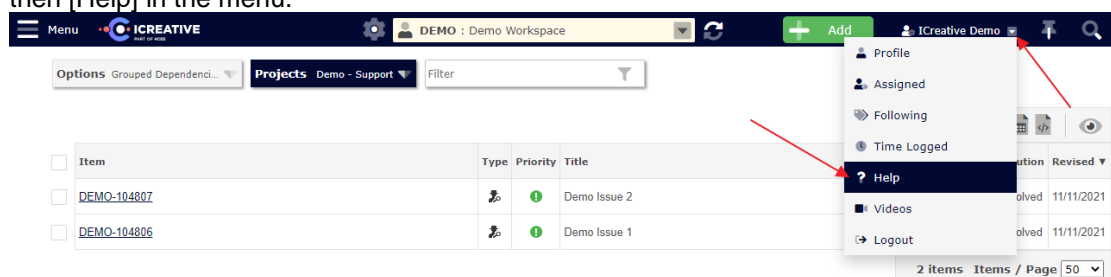
Here you will find additional video's and other informative documentation.

5.2   Disclaimer

Note: Disclaimer regarding privacy data (GDPR / AVG):

We would like to point out that information (in every form) that has been added to tickets within our ticket system Gemini will be kept by us in a secure environment.
You are responsible for determining which information is shared.