

CREATING A NEW ACCOUNT

# Support Portal Gemini

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## DOCUMENT HISTORY

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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
1.04	11-04-2019	Paul van der Veer	Change website url portal
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1.07	19-02-2021	Erik Vossers	Content revision
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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.

ICreative Support contact information:

Phone: +31 (0)318-493151

E-Mail: [support@icreative.nl](mailto:support@icreative.nl)

# 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

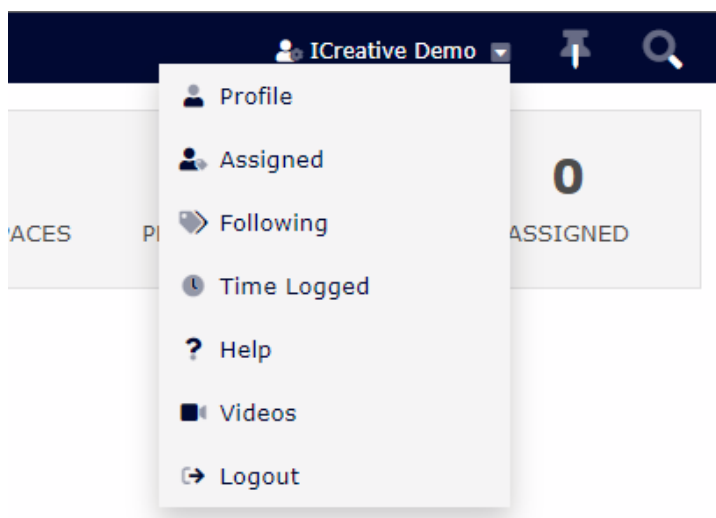
To register, a ticket needs to be created in Gemini with a registration request. You'll need to request this through someone from your organization that already has an account in Gemini or through the "Teamlead Projects" from ICreative.

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.

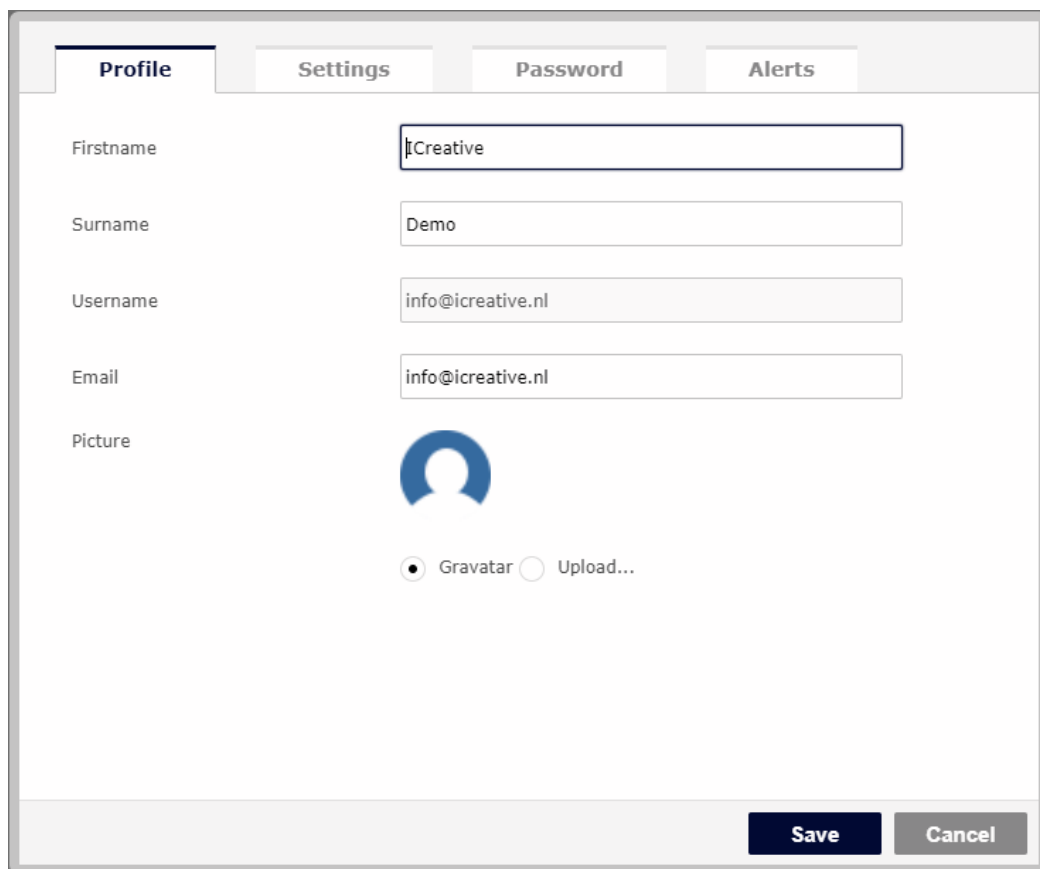
## 2.2 Personal Settings

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.



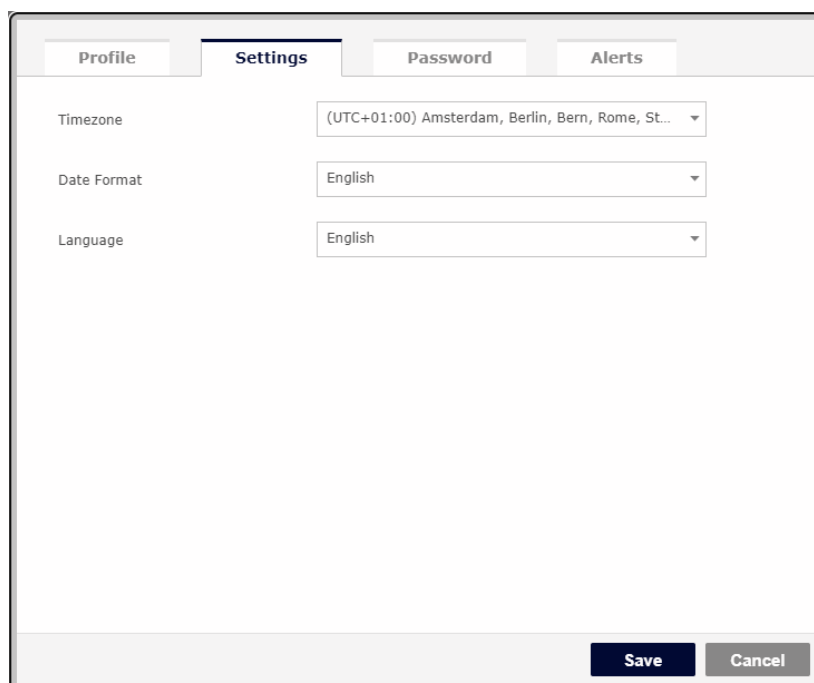
The [Profile] screen allows you to edit:

- Your personal details



The screenshot shows the 'Profile' tab of a user settings window. It contains five input fields: 'Firstname' with the value 'Creative', 'Surname' with 'Demo', 'Username' with 'info@icreative.nl', and 'Email' with 'info@icreative.nl'. Below these is a 'Picture' section featuring a blue circular placeholder icon and two radio buttons: 'Gravatar' (selected) and 'Upload...'. At the bottom right are 'Save' and 'Cancel' buttons.

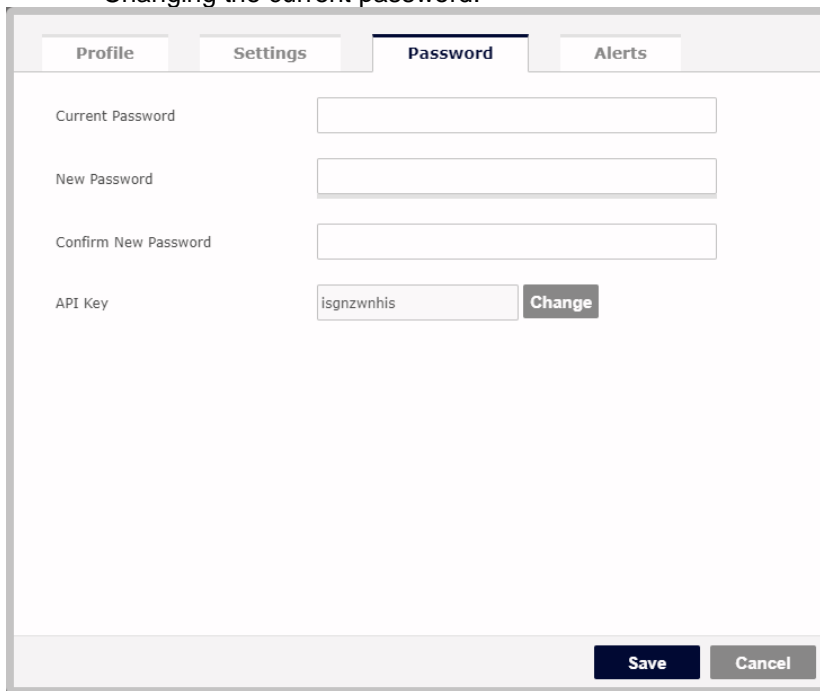
- Your localization settings



The screenshot shows the 'Settings' tab of the same user settings window. It contains three dropdown menus: 'Timezone' set to '(UTC+01:00) Amsterdam, Berlin, Bern, Rome, St...', 'Date Format' set to 'English', and 'Language' set to 'English'. At the bottom right are 'Save' and 'Cancel' buttons.

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

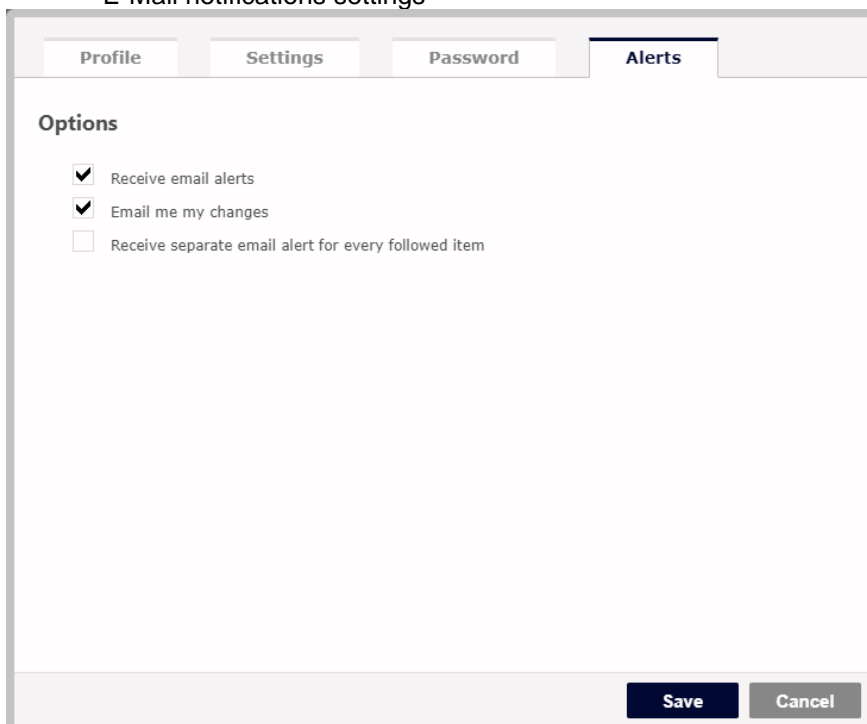
- Changing the current password:



The screenshot shows a user profile interface with four tabs: Profile, Settings, Password, and Alerts. The Password tab is selected. It contains four input fields: Current Password, New Password, Confirm New Password, and API Key. The API Key field contains the text 'isgnzwnhis' and has a 'Change' button next to it. At the bottom right, there are 'Save' and 'Cancel' buttons.

Profile	Settings	Password	Alerts
Current Password			
New Password			
Confirm New Password			
API Key			
isgnzwnhis			
Change			
Save			
Cancel			

- E-Mail notifications settings



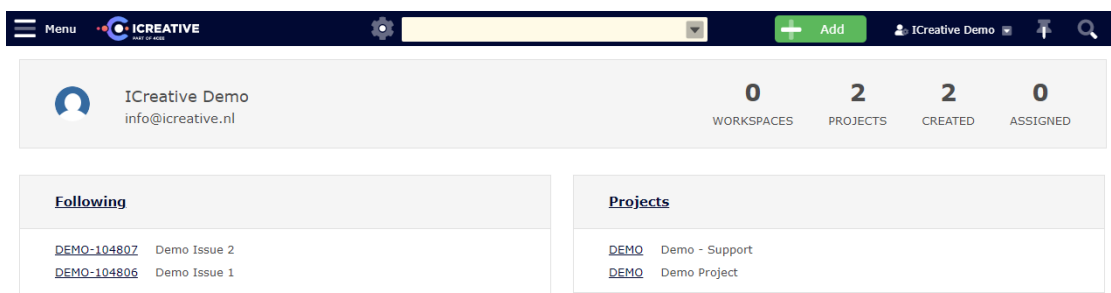
The screenshot shows the same user profile interface, but with the Alerts tab selected. It contains a section titled 'Options' with three checkboxes: 'Receive email alerts' (checked), 'Email me my changes' (checked), and 'Receive separate email alert for every followed item' (unchecked). At the bottom right, there are 'Save' and 'Cancel' buttons.

Profile	Settings	Password	Alerts
Options			
<input checked="" type="checkbox"/> Receive email alerts			
<input checked="" type="checkbox"/> Email me my changes			
<input type="checkbox"/> Receive separate email alert for every followed item			
Save			
Cancel			

## 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:

The screenshot shows a 'Item' form for creating a new ticket. The form has a tabbed interface with the 'Item' tab selected. It contains the following fields and controls:

- Project:** A dropdown menu with the placeholder text 'Select your project'.
- Type:** A dropdown menu with the value 'Issue'.
- Title:** A text input field.
- Description:** A rich text editor with a toolbar containing options for Paragraph, Verdana, 11pt, bold, italic, underline, strikethrough, link, unlink, list, indent, outdent, quote, and image. Below the toolbar is a large text area for the description.
- Product:** A dropdown menu with the value '<Select>'.
- Priority:** A dropdown menu with the value 'Low'.
- Attachments:** A button labeled 'Choose Files' and the text 'No file chosen'.

At the bottom right of the form, there are two buttons: 'Add' and 'Cancel'.



Fill in the fields on the form.

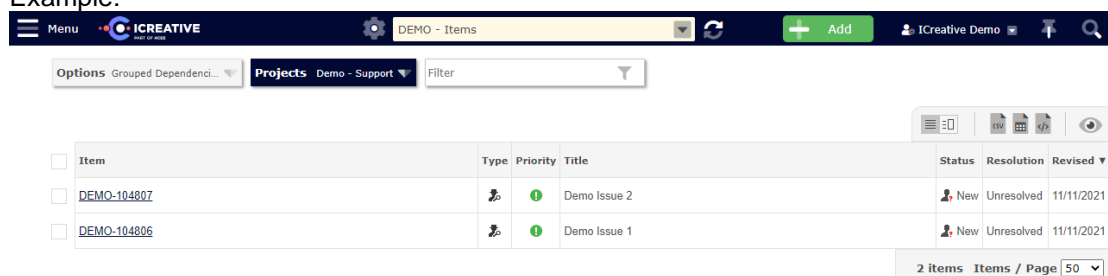
- **Project:** A list of projects you have access to, please make sure to select the correct project to prevent delays in processing.
  - **Type:** This helps us to distinguish issues from change requests.
  - **Title:** a short description of the issue.
  - **Description:** Please enter a detailed description 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.

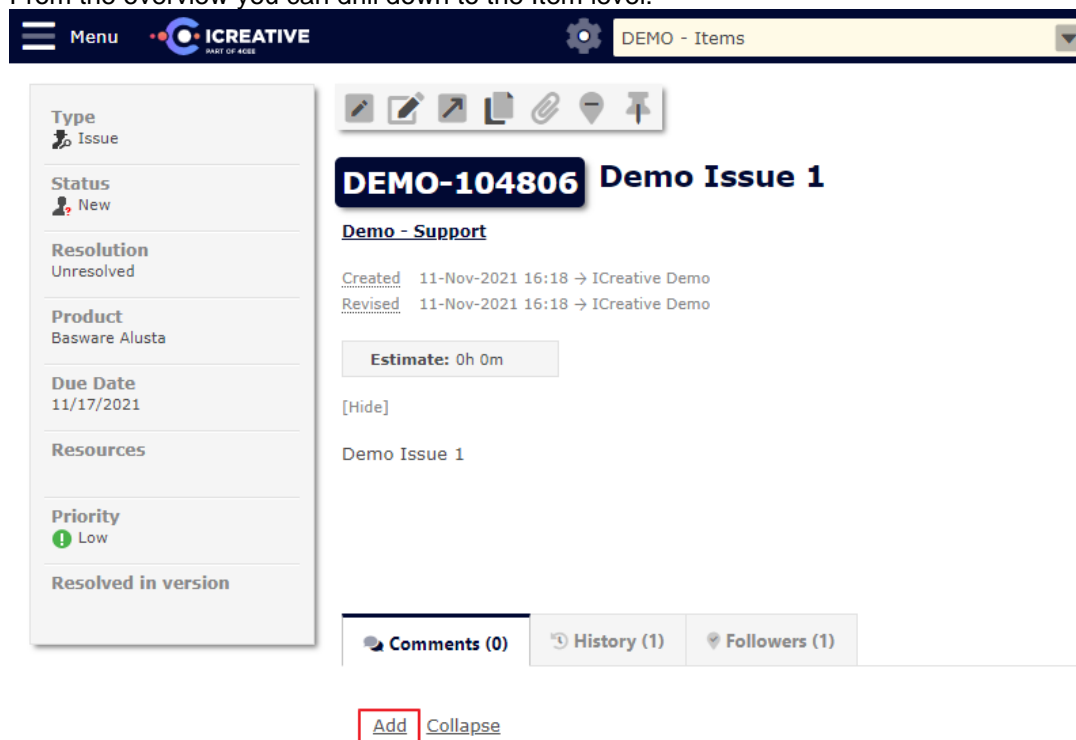
Example:



The screenshot shows the ICREATIVE dashboard with a dark blue header. The main content area displays a table of tickets for the 'DEMO - Items' project. The table has columns for Item, Type, Priority, Title, Status, Resolution, and Revised. Two tickets are listed: DEMO-104807 (Demo Issue 2) and DEMO-104806 (Demo Issue 1). Both are marked as 'New' and 'Unresolved' with a status of 'New' and a resolution of 'Unresolved'. The table is filtered by 'Demo - Support' and shows 2 items per page.

Item	Type	Priority	Title	Status	Resolution	Revised
DEMO-104807	Issue	Low	Demo Issue 2	New	Unresolved	11/11/2021
DEMO-104806	Issue	Low	Demo Issue 1	New	Unresolved	11/11/2021

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



The screenshot shows the ICREATIVE dashboard with a dark blue header. The main content area displays the details of a specific ticket, DEMO-104806, titled 'Demo Issue 1'. The ticket is categorized as 'Demo - Support'. The details include the creation and revision dates (11-Nov-2021 16:18) and the user (ICreative Demo). The ticket is marked as 'New' and 'Unresolved' with a status of 'New' and a resolution of 'Unresolved'. The ticket is also marked as 'Low' priority. The ticket is resolved in version 1.0.0. The ticket is also marked as 'New' and 'Unresolved' with a status of 'New' and a resolution of 'Unresolved'. The ticket is also marked as 'Low' priority. The ticket is resolved in version 1.0.0. The ticket is also marked as 'New' and 'Unresolved' with a status of 'New' and a resolution of 'Unresolved'. The ticket is also marked as 'Low' priority. The ticket is resolved in version 1.0.0.

**DEMO-104806 Demo Issue 1**

**Demo - Support**

**Created** 11-Nov-2021 16:18 → ICreative Demo  
**Revised** 11-Nov-2021 16:18 → ICreative Demo

**Estimate:** 0h 0m

[Hide]

Demo Issue 1

**Comments (0)** **History (1)** **Followers (1)**

**Add** **Collapse**

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.

The screenshot shows the ICREATIVE interface with a ticket titled "DEMO-104806 Demo Issue 1". The ticket is categorized as "Demo - Support". The left sidebar contains details: Type (Issue), Status (New), Resolution (Unresolved), Product (Basware Alusta), Due Date (11/17/2021), Resources, Priority (Low), and Resolved in version. The main content area shows the ticket title, a "Demo - Support" link, creation and revision timestamps (11-Nov-2021 16:18 → ICreative Demo), an "Estimate: 0h 0m" box, a "[Hide]" button, and the ticket description "Demo Issue 1". At the bottom, there are three tabs: "Comments (0)", "History (1)", and "Followers (1)". The "Comments (0)" tab is highlighted with a red box. Below the tabs are "Add" and "Collapse" links.

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

This screenshot shows the same ticket as the previous one, but with a red box highlighting a set of action icons at the top of the main content area. The icons are: a pencil (edit), a notepad and pencil (description), an upward arrow (move), a document (attachments), a paperclip (add attachment), a location pin (follow/unfollow), and a pushpin (pin). Below the icons, the ticket title "DEMO-104806 Demo Issue 1" and the "Demo - Support" link are visible. The left sidebar and the bottom tabs remain the same.

= Change a ticket

= Change the description of a ticket

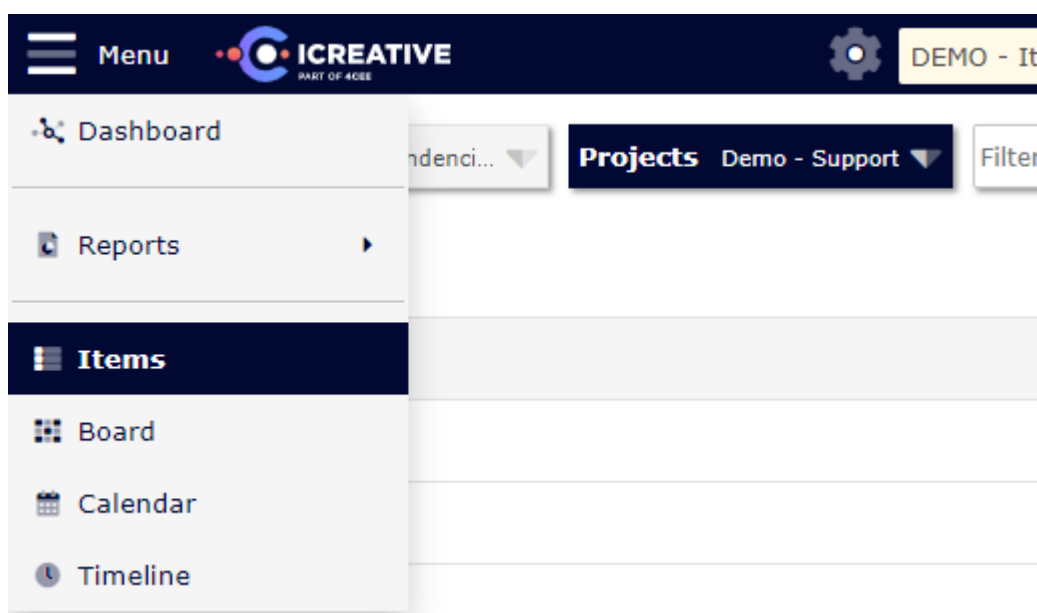
= Add an attachment


= To follow or unfollow a ticket.

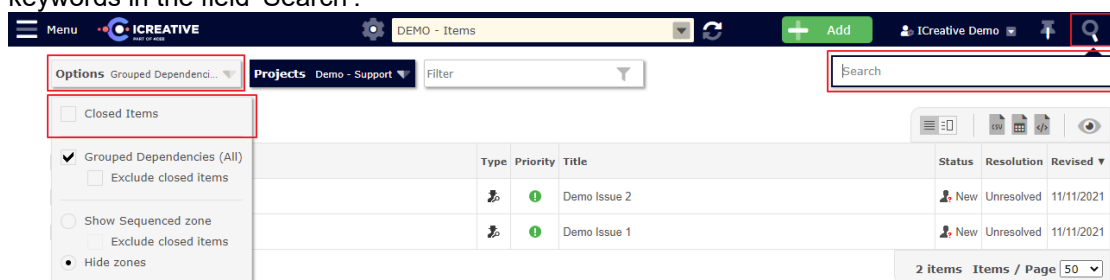
*If you follow a ticket, you will receive an email with every change regarding this ticket.*

### 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'.



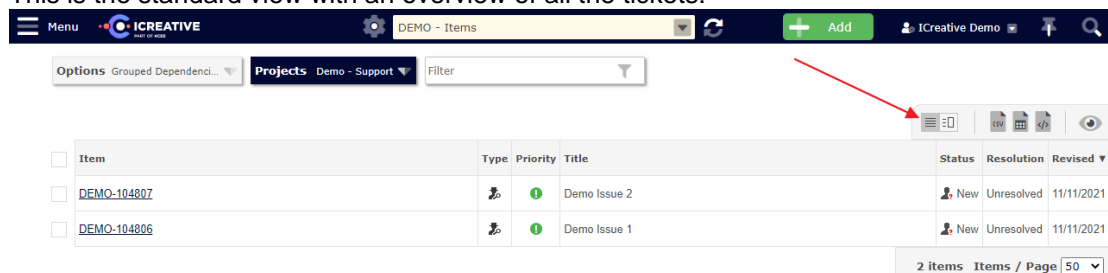
Closed tickets can also be displayed in the search results by selecting 'Include closed items' in [Options] on the top left.

### 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:



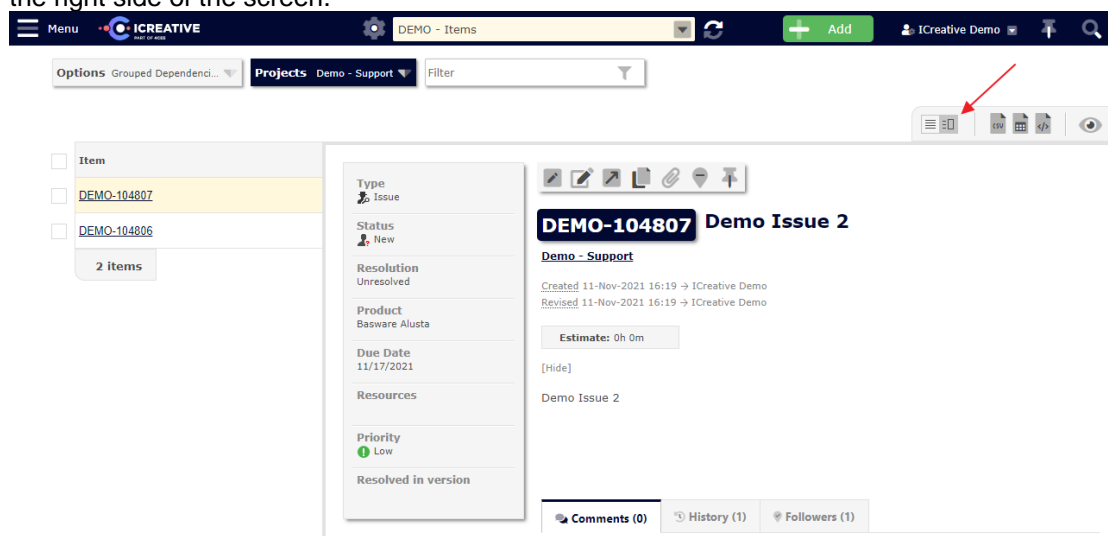
The screenshot shows the ICREATIVE project overview interface. At the top, there's a navigation bar with 'Menu', 'ICREATIVE', 'DEMO - Items', and an 'Add' button. Below this, there's a filter bar with 'Options', 'Grouped Dependenci...', 'Projects', 'Demo - Support', and a 'Filter' input. The main area displays a table of tickets:

Item	Type	Priority	Title	Status	Resolution	Revised
<input type="checkbox"/> DEMO-104807	Issue	Low	Demo Issue 2	New	Unresolved	11/11/2021
<input type="checkbox"/> DEMO-104806	Issue	Low	Demo Issue 1	New	Unresolved	11/11/2021

At the bottom right, it shows '2 items' and 'Items / Page 50'. A red arrow points to the view toggle icons in the top right corner.

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.

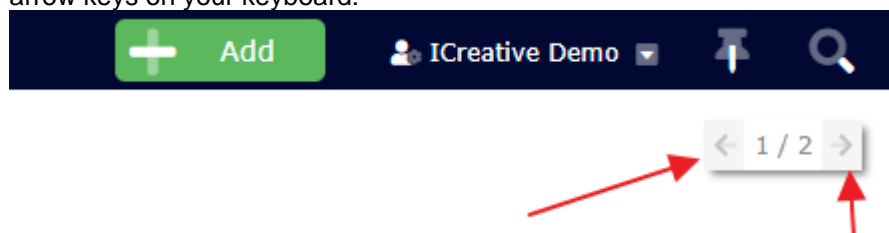


The screenshot shows the ICREATIVE project overview interface with the details of a selected ticket. The top navigation bar is the same. The filter bar is also the same. The main area is split into three sections:

- Left sidebar:** A list of tickets with 'DEMO-104807' selected. Below the list, it says '2 items'.
- Middle sidebar:** Details for the selected ticket:
  - Type: Issue
  - Status: New
  - Resolution: Unresolved
  - Product: Basware Alusta
  - Due Date: 11/17/2021
  - Resources:
  - Priority: Low
  - Resolved in version:
- Main content area:** Details for 'DEMO-104807 Demo Issue 2'. It shows 'Demo - Support', 'Created 11-Nov-2021 16:19 → ICreative Demo', 'Revised 11-Nov-2021 16:19 → ICreative Demo', 'Estimate: 0h 0m', '[Hide]', and 'Demo Issue 2'. At the bottom, there are tabs for 'Comments (0)', 'History (1)', and 'Followers (1)'.

A red arrow points to the view toggle icons in the top right corner.

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



The screenshot shows the ICREATIVE project overview interface with the pagination controls. The top navigation bar is the same. The filter bar is also the same. The main area is split into three sections:

- Left sidebar:** A list of tickets with 'DEMO-104807' selected. Below the list, it says '2 items'.
- Middle sidebar:** Details for the selected ticket:
  - Type: Issue
  - Status: New
  - Resolution: Unresolved
  - Product: Basware Alusta
  - Due Date: 11/17/2021
  - Resources:
  - Priority: Low
  - Resolved in version:
- Main content area:** Details for 'DEMO-104807 Demo Issue 2'. It shows 'Demo - Support', 'Created 11-Nov-2021 16:19 → ICreative Demo', 'Revised 11-Nov-2021 16:19 → ICreative Demo', 'Estimate: 0h 0m', '[Hide]', and 'Demo Issue 2'. At the bottom, there are tabs for 'Comments (0)', 'History (1)', and 'Followers (1)'.

A red arrow points to the left arrow and another red arrow points to the '1 / 2' text.


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.

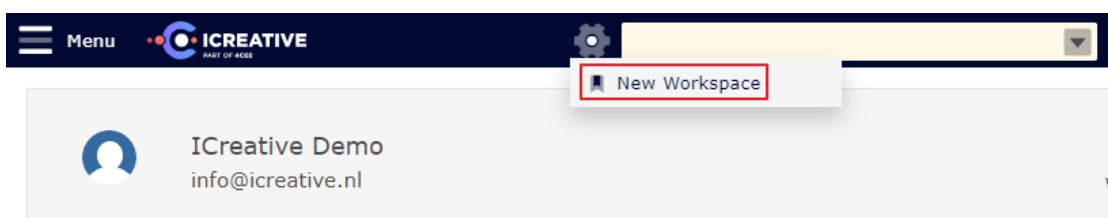
## 4. Creating and managing Workspaces (views)

### 4.1 Creating a Workspace (view)

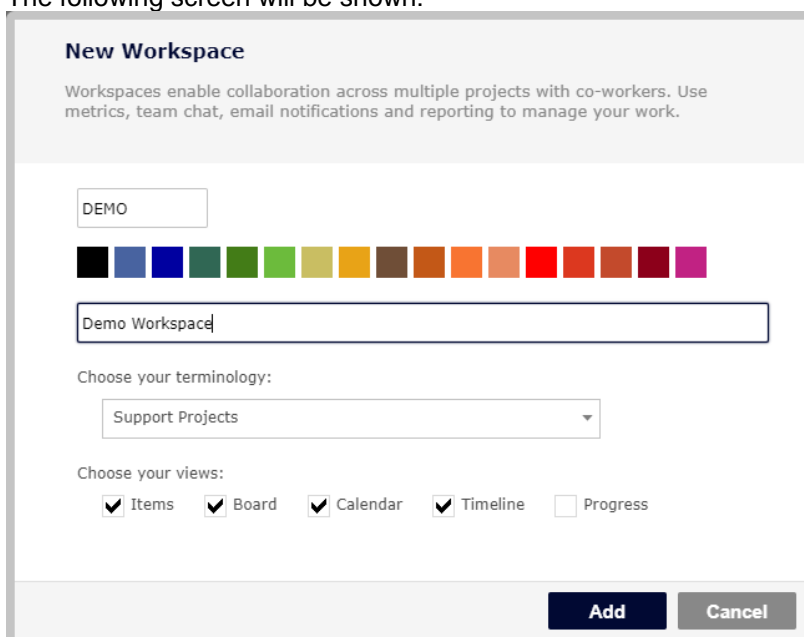
You can make workspaces within Gemini. A workspace is a certain view of a project where you can select specific settings to view all relevant information in a wink of an eye. In a workspace you can select the desired columns and filters. These you can save and start using every time you log in to Gemini.

How you can create a workspace:

Click on the icon  and click 'New Workspace'.



The following screen will be shown:


 The screenshot shows the 'New Workspace' form. At the top, there is a title 'New Workspace' and a description: 'Workspaces enable collaboration across multiple projects with co-workers. Use metrics, team chat, email notifications and reporting to manage your work.' Below this, there is a text input field containing 'DEMO'. Underneath the text field is a row of 16 colored squares. Below the color selection is a text input field containing 'Demo Workspace'. Below this is a section titled 'Choose your terminology:' with a dropdown menu showing 'Support Projects'. Below that is a section titled 'Choose your views:' with five checkboxes: 'Items' (checked), 'Board' (checked), 'Calendar' (checked), 'Timeline' (checked), and 'Progress' (unchecked). At the bottom right, there are two buttons: 'Add' and 'Cancel'.

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

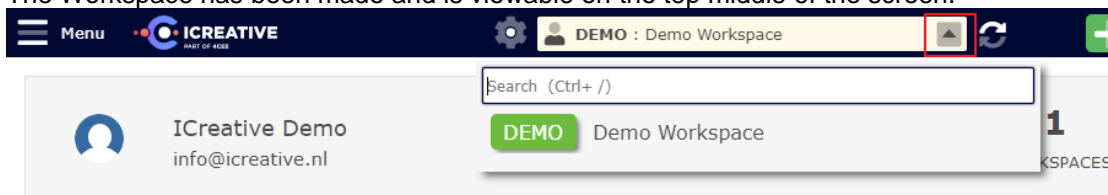
The second field is the description for the workspace.

“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.

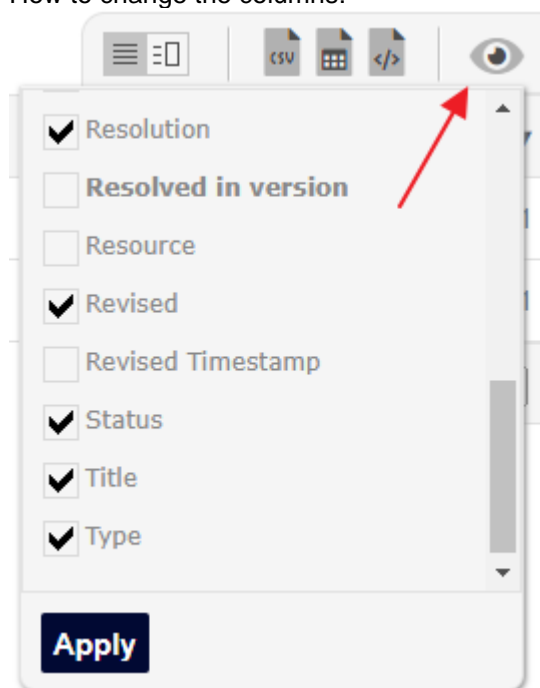


You could, for the same project or even for multiple projects, make several workspaces which can show specific views that you can select.

## 4.2 Changing columns and filters within the workspaces

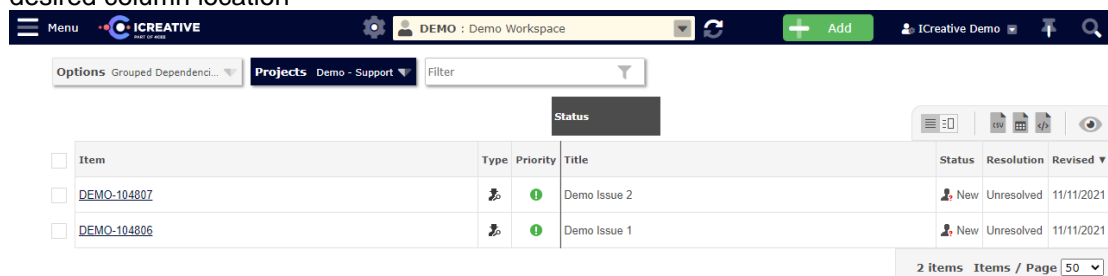
Select the appropriate Workspace (on the top middle of the screen) [click on ] and you can change the columns and filters by clicking on .

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



Item	Type	Priority	Title	Status	Resolution	Revised
DEMO-104807			Demo Issue 2	New	Unresolved	11/11/2021
DEMO-104806			Demo Issue 1	New	Unresolved	11/11/2021

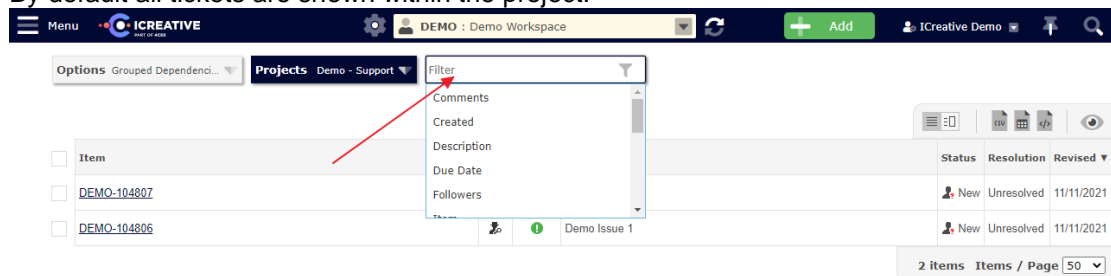
All your changes are automatically saved to the Workspace.



## Changing your filters:

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


By default all tickets are shown within the project:

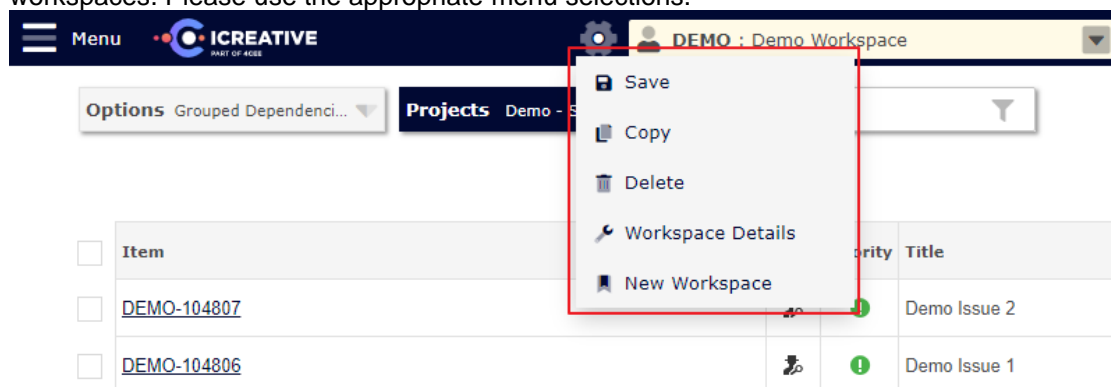


By clicking in the field [Filter], search for a field or add a field to the filters.

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

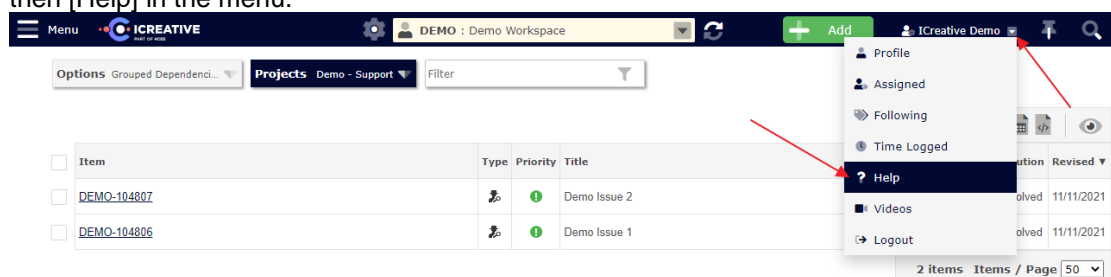
When clicking on the  icon, you can copy, delete or change all the settings of the created workspaces. Please use the appropriate menu selections.



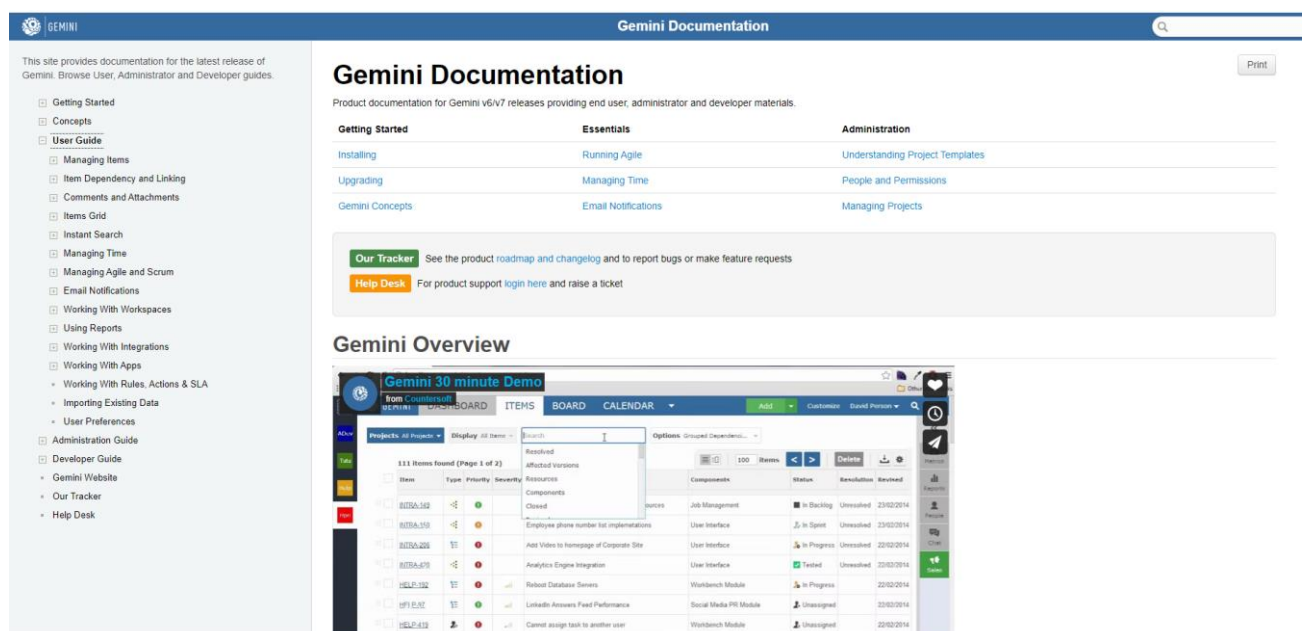
## 5. Additional Information

### 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.

