Barista Case Management
Setup Guide

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Overview

This document will guide you, the Admin or Technical Coordinator, on how to perform the initial setup for using Barista Case Management. Barista Case Management is a modern and powerful ticketing solution that enables any service desk to automate, track, and respond to employee questions across the enterprise. One unique aspect of Barista Case Management is that Espressive Barista, the virtual support agent, already knows to create tickets when it cannot answer an employee's question or request. Therefore, many of the tickets assigned to a team will come from Barista, instead of all the tickets being created manually by the agents in a traditional sense.

Barista Case Management can also leverage a delegated approach to administration. This means either a single admin can execute the entire setup, or for larger organizations, the workload can be distributed across additional departmental admins. In the distributed model, an admin can setup the initial departments (called "Service Departments") and then designate a Technical Coordinator for each one. Within their assigned department(s), the Technical Coordinator can then define all the teams (called "Service Teams") and designate "team lead(s)" for each one. Team leads can then manage and assign roles for team members and set up rules related to that team.

This table explains the rights per role:

Rights	Admin	Technical Coordinator	Service Lead	Service Agent	FAQ Admin
Use Barista Designer (Barista Control Center) Admin Settings	●				
Create Service Departments	●	●			
Create Teams	●	●			
Define Categories	●	●			
Invite Agents	●	●	●		
Add FAQ Admin Role	●	●	●		
Create & Edit FAQs	●	●			●
Run Reports	●				
View Team Feed & Tickets	●	●	●	●	

How to Configure a Service Department

To use Barista Case Management, you must first configure your Service Departments. Within each Service Department, an internal department (such as IT or HR) can define their Service Teams, team members, and the rules for how ticketing will work for that department. Barista Case Management can be tailored to suit the needs of each department.

Note: You will need the Admin role to access this configuration.

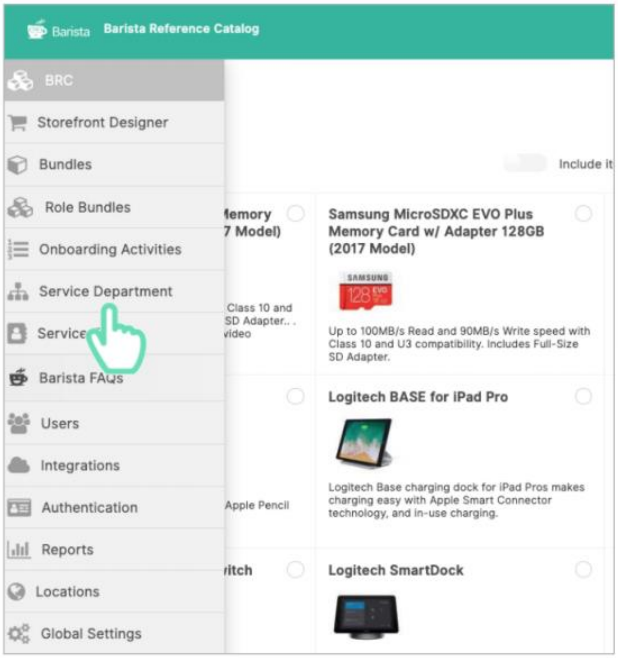
A SERVICE DEPARTMENT is a company department.

A SERVICE TEAM is a group of members that belongs to a specific Service Department.

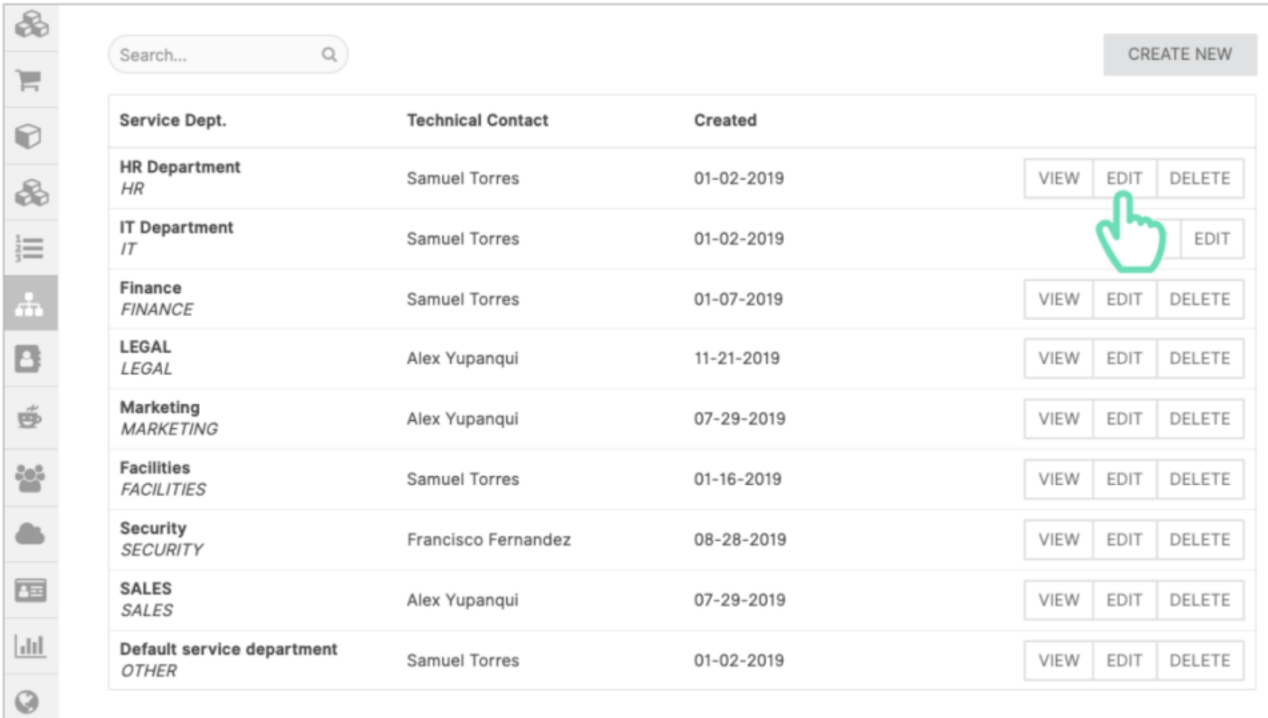
A CATEGORY is a label to organize the type of issue or request represented by the case.

Follow these steps to access the Service Department section:

1. Log into your Barista account.
2. From the sidebar menu on the left, select **More**.
3. Click on **Admin**. This will navigate you to the Barista Reference Catalog, the default landing page.
4. Hover over the sidebar icons to display the **Admin menu**.
5. Click on **Service Department**.



Note: If there are Service Departments already present, click on the EDIT button for each to ensure that they are properly configured.



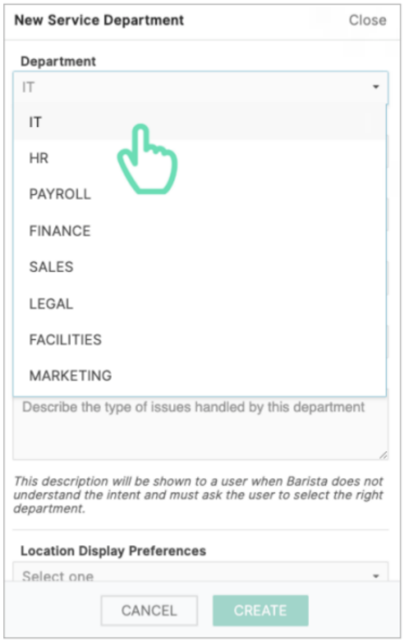
Follow these steps to create a new Service Department:

1. Navigate to the **Service Department** section of the **Admin menu**.
2. Click the **CREATE NEW** button at the top right of the page.

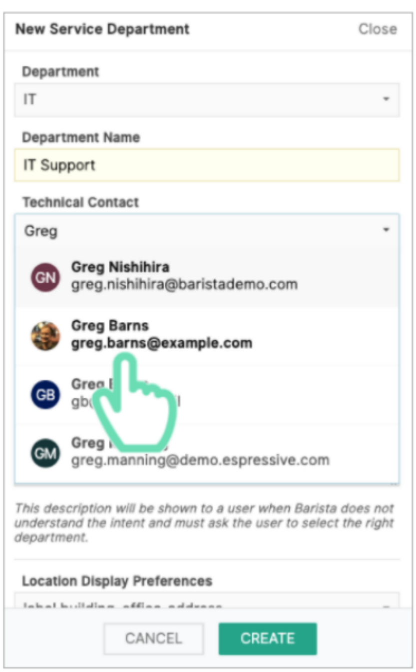
   This will open a new pop-up window.

3. Select a **Department** option from the drop-down men.

   This is a pre-defined list of common departments that helps Barista understand which Service Department you are adding.



4. Click on the **Department Name** field and type the specific name of your new Service Departments.
5. Click on the **Technical Contact** field and type the name of the user who will be the key contact for this Service Department.
6. Click on the name of the user to designate them as the **Technical Contact**.



7. Select a **Default Task Type** from the drop-down options.

   When creating a new case, this is the default case type used for anyone under this Service Department.

   For example, IT departments typically address their tasks as "Incidents" and HR departments as "Case," so this should be their corresponding Default Task Type.

   The task type can always be changed after a ticket is created.

8. Click on **Route tickets to** and select **Espressive** from the drop-down options.

   This is the option to use when you are not integrating any third-party ticketing application.

   Note: To know more about third-party support, please reach out to your System Administrator.

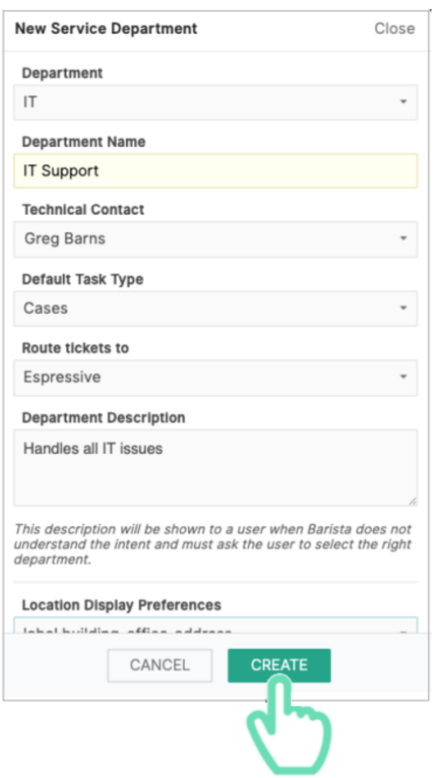
9. Under **Department Description**, add a description of the type of issues handled by this Service Department.

10. Select a **Location Display Preference**.

    This is how the location value is displayed within the cases form for this specific Service Department. For example, some departments might prefer to see the employee's building and city, while others might prefer to see the city and state.

11. Click on the **CREATE** button when finished.

    Your new Service Department will show on top of the Service Department list, which is sorted by most recently



How to Create a Service Team

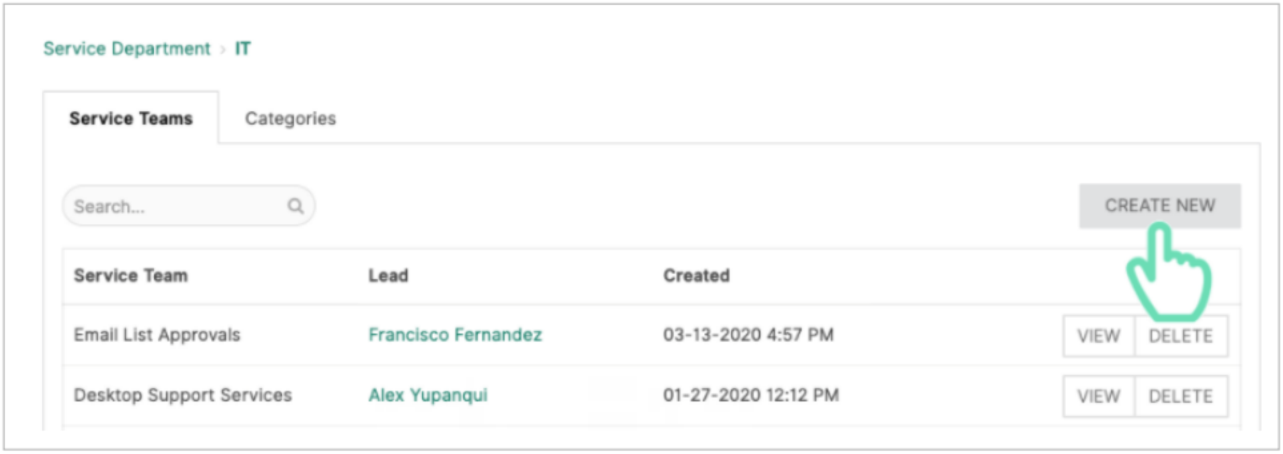
A Service Team, sometimes called an Assignment Group, is the team responsible for managing and resolving the cases or tickets for their area of focus within a department. For example, an HR department might have a Service Team for questions about their benefits and another Service Team for issues related to personnel. To route tickets correctly, you first need to create a Service Department. The Technical Coordinator for that department can then create the Service Team and assign the initial Service Team leads. Afterward, each Service Team lead can invite other members and manage the details of their team.

Follow these steps to add members to a Service Team:

1. Navigate to the Service Department section of the Admin menu.
2. Click on the VIEW button at the top right of the page.

   This will navigate you to the **Service Teams** tab by default.
3. Click on the **CREATE NEW** button located in the upper right corner.

   This will open a new pop-up window.

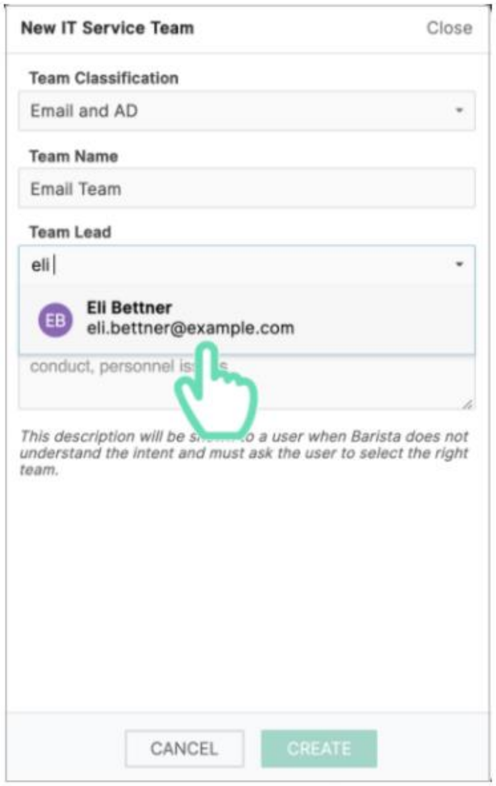


4. Select a **Team Classification** from the drop-down menu options.

   Espressive-specific Service Team classifications tell us what type of team you are defining. Barista will use this information to automatically route issues related to that team.
5. Under **Team Name**, type in the name of your new Service Team.

6. Designate a Team Lead.

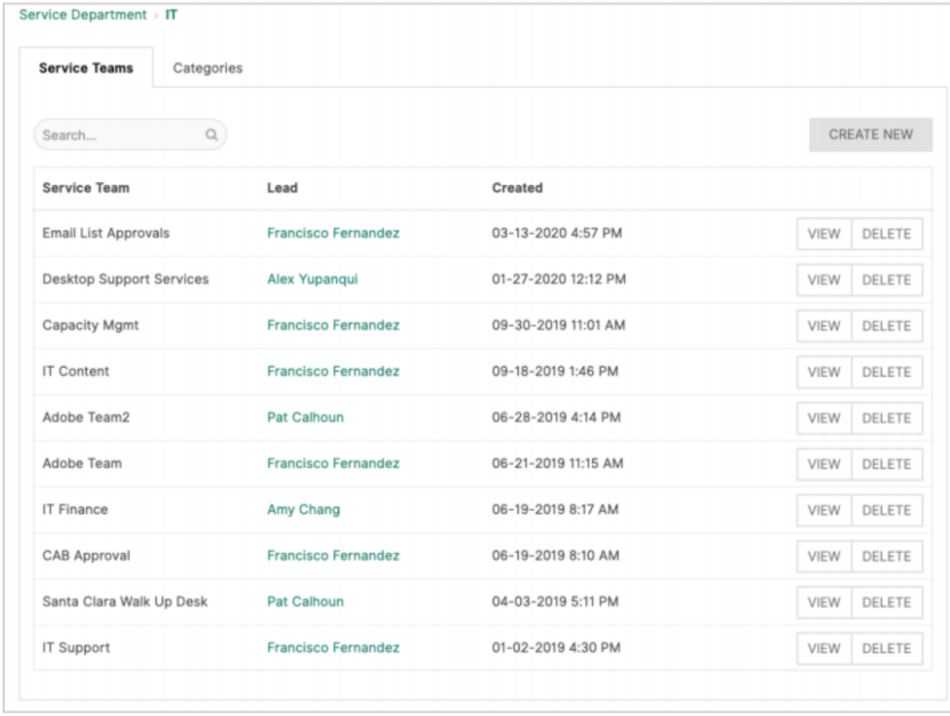
   This is the initial person who can then take the responsibility of inviting other team members as well as change minor details about the team.



7. Add a description of the type of issues handled by this Service Team.
8. Click on the **CREATE** button when finished.

9. Repeat steps 4 through 9 to create as many Service Teams as you need.

   Your new Service Team will show on top of the Service Teams list, which is sorted by most recently updated.



Service Department › IT

Service Teams | Categories

Search... CREATE NEW

Service Team	Lead	Created	
Email List Approvals	Francisco Fernandez	03-13-2020 4:57 PM	VIEW DELETE
Desktop Support Services	Alex Yupanqui	01-27-2020 12:12 PM	VIEW DELETE
Capacity Mgmt	Francisco Fernandez	09-30-2019 11:01 AM	VIEW DELETE
IT Content	Francisco Fernandez	09-18-2019 1:46 PM	VIEW DELETE
Adobe Team2	Pat Calhoun	06-28-2019 4:14 PM	VIEW DELETE
Adobe Team	Francisco Fernandez	06-21-2019 11:15 AM	VIEW DELETE
IT Finance	Amy Chang	06-19-2019 8:17 AM	VIEW DELETE
CAB Approval	Francisco Fernandez	06-19-2019 8:10 AM	VIEW DELETE
Santa Clara Walk Up Desk	Pat Calhoun	04-03-2019 5:11 PM	VIEW DELETE
IT Support	Francisco Fernandez	01-02-2019 4:30 PM	VIEW DELETE

How to Add Categories

Just like Service Teams, Categories are specified per Service Department. A Category is a way of organizing the type of issue or request for each case. When you create a new Service Department, a set of default Categories will be automatically generated that you can edit, remove, or expand upon.

First, define all of the possible Categories you want across the entire Service Department. Then, at the Service Team level, define which of those Categories are necessary for that particular Service Team.

Note: You will need to be an Admin or Technical Coordinator for that department in order to manage the Categories.

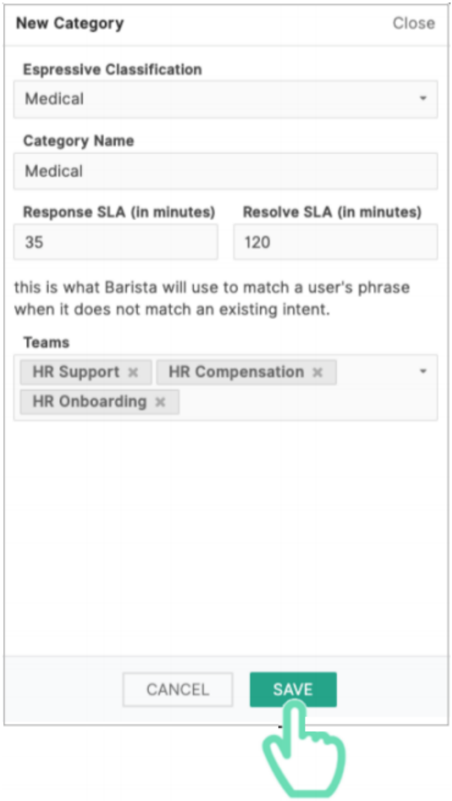
Follow these steps to edit a Category:

1. Navigate to the **Service Department** section of the **Admin menu**.
2. Click on the **VIEW** button at the top right of the page.

   This will navigate you to the **Service Teams** tab by default.
3. Click on the **Categories** tab.
4. Click the **VIEW** button of the Category you want to edit.

   This will open a new pop-up window.

5. Make any necessary changes, then click on the SAVE button when finished.

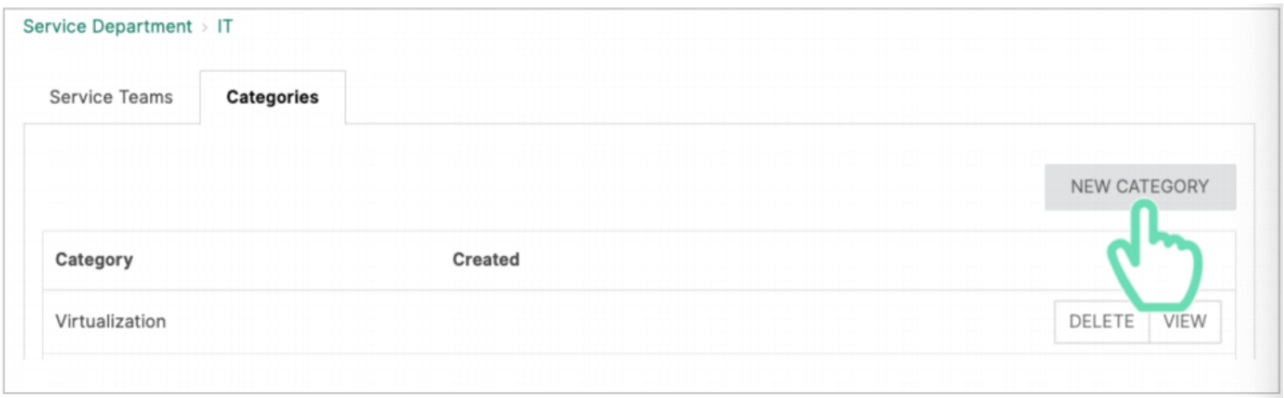


Follow these steps to create a new Category:

1. Navigate to the **Service Department** section of the **Admin menu**.
2. Click on the **VIEW** button at the top right of the page.

   This will navigate you to the **Service Teams** tab by default.
3. Click on the **Categories** tab.
4. Click on the **NEW CATEGORY** button.

   This will open a new pop-up window.



5. Click on the Espressive Classification drop-down menu and select an option.

   This option tells Barista the nature of the Category you are adding, which Barista can use to route the employee issue to the correct team.

6. Under Category Name, type the specific name of your new Category.

7. Define the time period (in minutes) for the Response SLA and Resolve SLA.

   This is the period of time that you would like the team to resolve or respond by.

   For example, if you set the Resolve SLA to 30 minutes, you are saying the goal is to respond to an employee within 30 minutes or less.

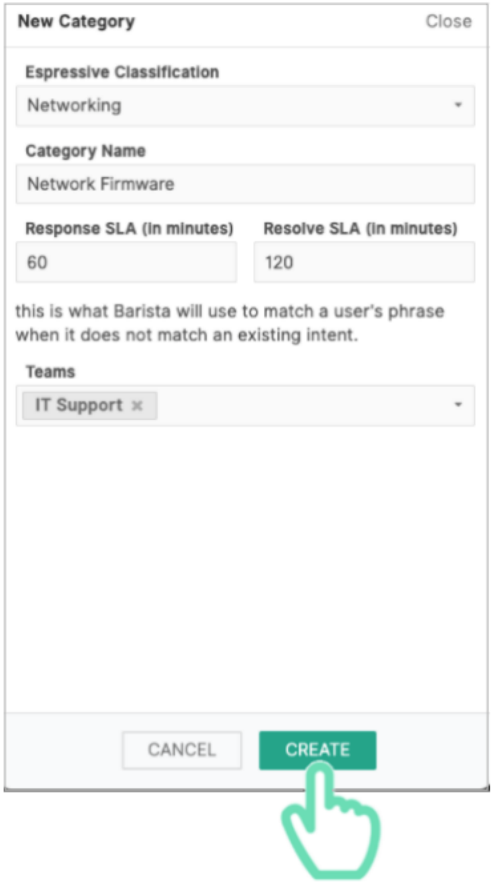
8. Click on Teams and select a team from the drop-down menu options.

   This allows you to specify which Service Teams this Category applies to under the selected Service Department. You can select multiple Service Teams for one Category.

9. Click on the CREATE button when finished.

10. Repeat steps 4 through 9 to create as many Categories as you need.

    Your new Category will show on top of the Category list, which is sorted by most recently updated.



How to Add Members

Members are added to Service Teams at the Admin menu. When configuring a member, you need to specify their name, their role, and grant FAQ Admin privileges if needed. Members can be added to any Service Team by the Admin, the Technical Coordinator of the department, or by any Team Lead from that team.

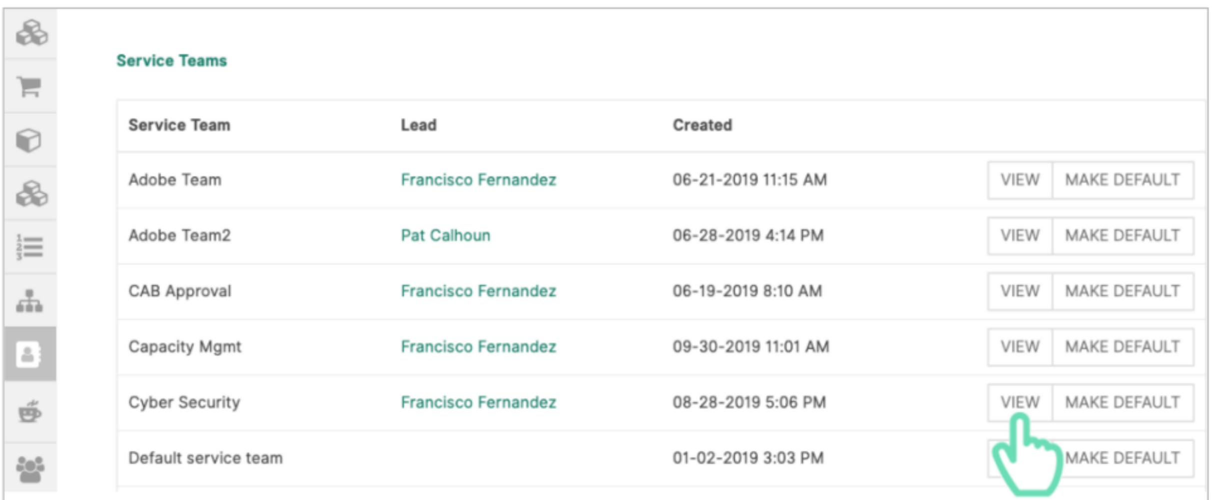
Follow these steps to add members to a Service Team:

1. Log in to your Barista account.
2. From the sidebar menu on the left side, select **More**.
3. Click on **Admin**.

   This will navigate you to the Barista Reference Catalog, the default landing page.
4. Hover over the sidebar icons to display the **Admin menu**.
5. Click on **Service Team**.

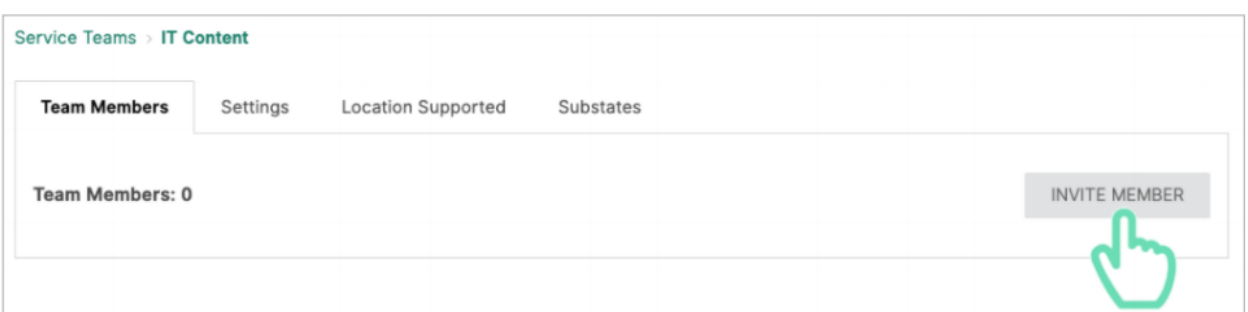
   This will navigate you to the Service Team list.
6. Click on the **VIEW** button of a Service Team.

   This will navigate you to the **Team Members** tab.

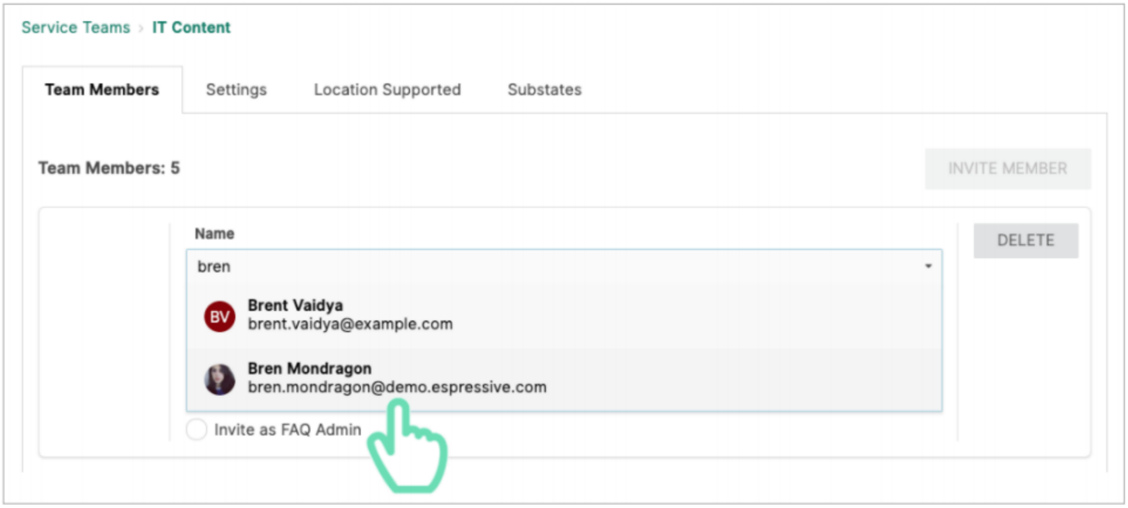


7. Click on the **INVITE MEMBER** button.

   This will open a new form.

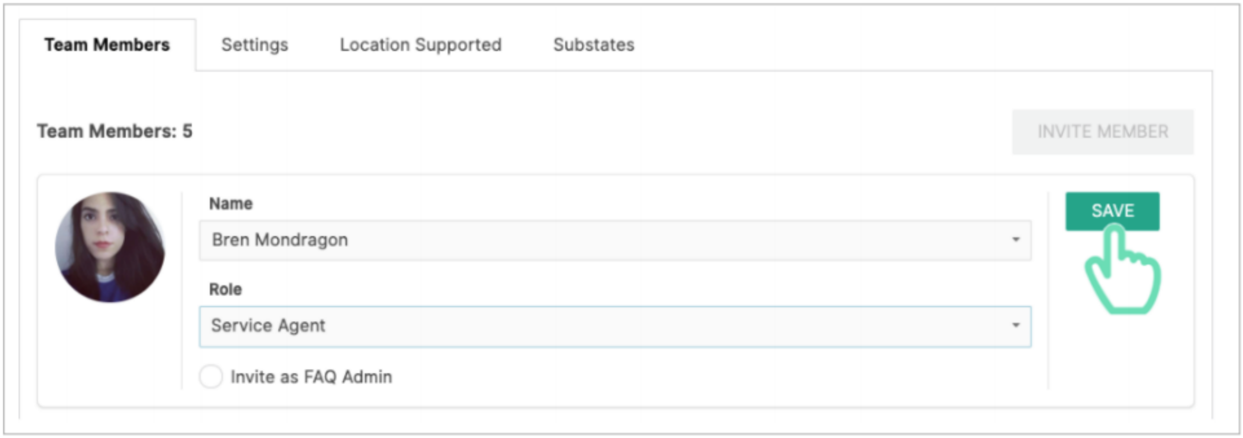


8. Click on the Name field and type the name or email of the user you want to add.
9. Select the name of the user from the drop-down menu.



10. Assign a Role:
    - A SERVICE LEAD is able to invite agents to the Service Team, assign a user as FAQ Admin, and view the Case Feed of the Service Team.
    - A SERVICE AGENT is only able to see the Case Feed and the cases of the Service Team.
11. Select the **Invite as FAQ Admin** option if you want to designate this user to manage content for the selected Service Team in the **Barista FAQ Dashboard**.
12. Click on the **SAVE** button when finished.

    The new member will appear on top of the list on the Team Members tab.

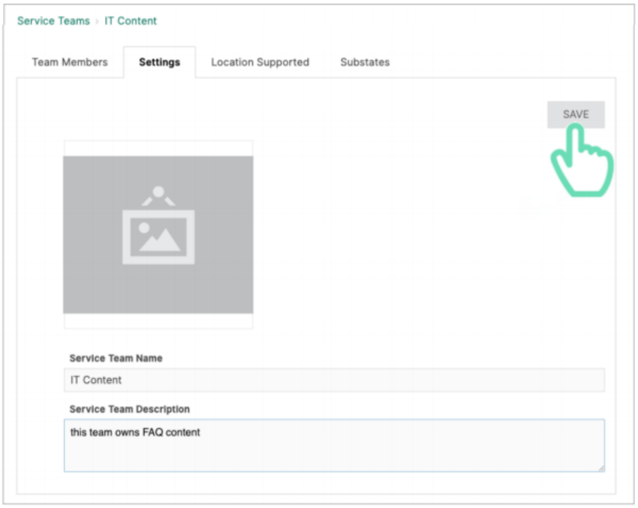


*Note: To remove a member, click on the **DELETE** button next to their name. This will not delete the user record, only association of that user to that Service Team.*

On the **Settings** tab of the Service Teams section, you can also:

- Customize the Service Team by adding a photo.
- Change the Service Team name.
- Change the Service Team description.

*Note: Click on the **SAVE** button after making any changes.*



How to Add Locations

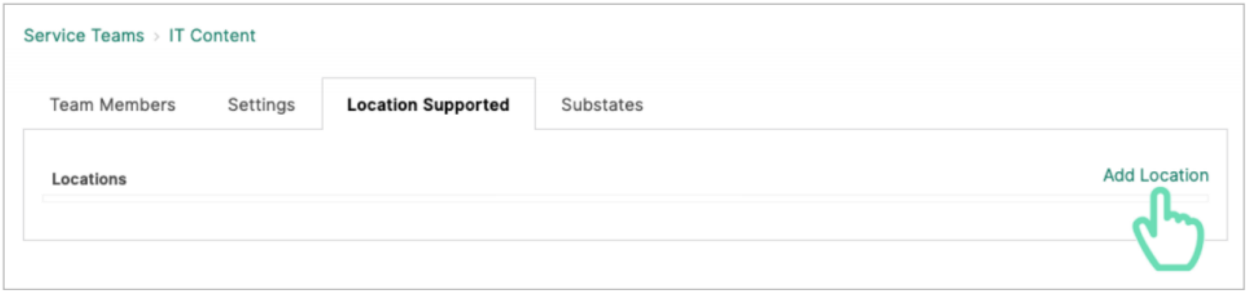
When Barista creates a ticket for an employee, some organizations may want the ticket to route to a specific Service Team based on the location of that employee.

Follow these steps to configure Service Team Locations:

1. Navigate to the **Service Teams** section of the **Admin menu**.
2. Click on the **VIEW** button of a Service Team from the list.

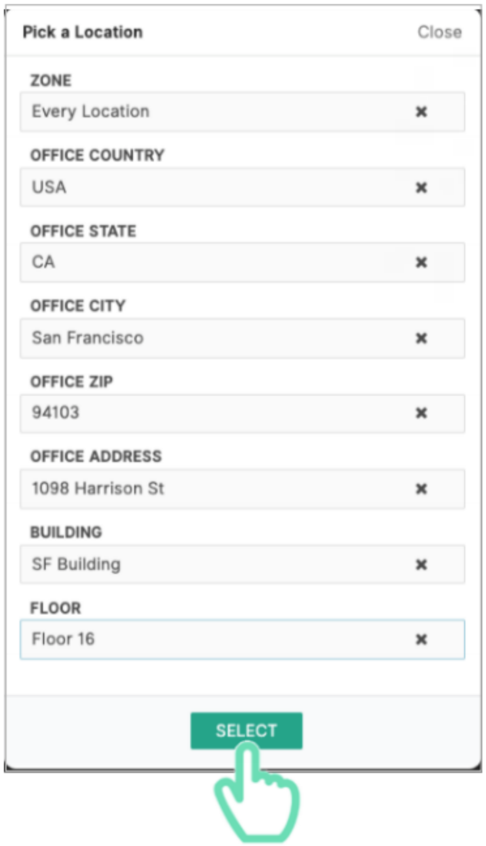
   This will navigate you to the **Team Members** tab by default.
3. Click on the **Location Supported** tab.
4. Click on the **Add Location** button at the top right corner.

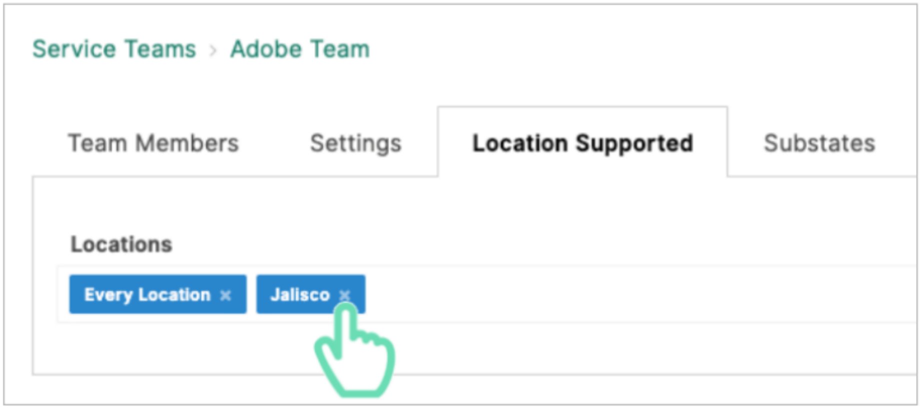
   This will open a new pop-up window.



5. From here, you can specify the employee location by selecting the drop-down menu for any of the following locations:
   - ZONE
   - OFFICE COUNTRY
   - OFFICE STATE
   - OFFICE CITY
   - OFFICE ZIP
   - OFFICE ADDRESS
   - BUILDING
   - FLOOR
6. Click on the **SELECT** button when finished.

   Note: You can delete a location by clicking on the X to the right of the label. There has to be at least one location specified when using this functionality.





How to Add Substates

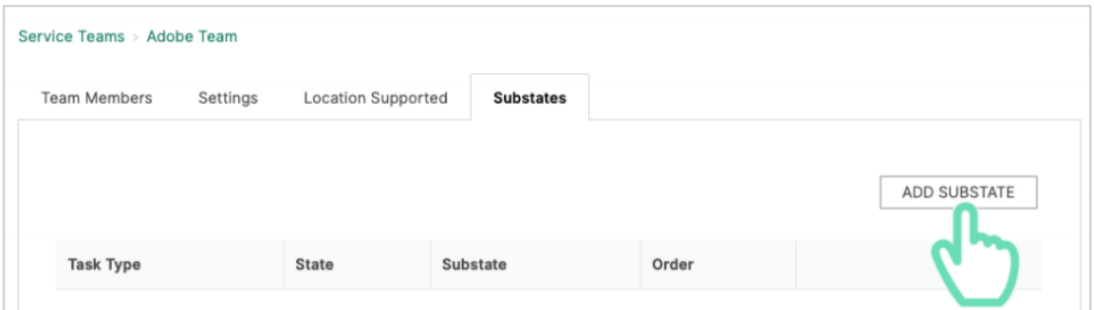
Case Substates are provided to allow customers to track the state of their cases/tasks with more granularity.

Follow these steps to configure Service Team Substates.

1. Navigate to the **Service Teams** section of the **Admin menu**.
2. Click on the **VIEW** button of a Service Team from the list.

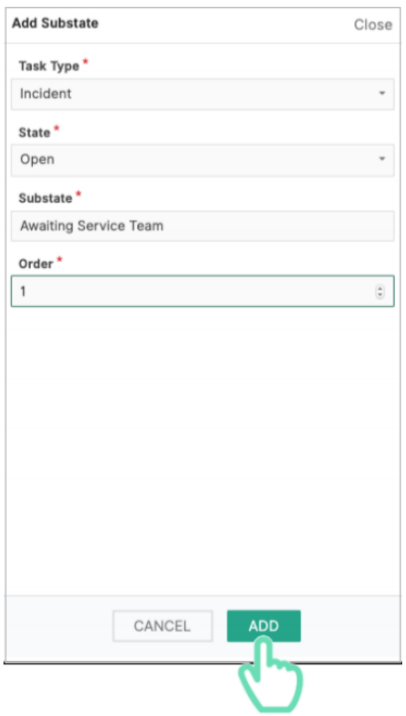
   This will navigate you to the **Team Members** tab by default.
3. Click on the **Substates** tab.
4. Click on the **ADD SUBSTATE** button at the top right corner.

   This will open a new pop-up window.



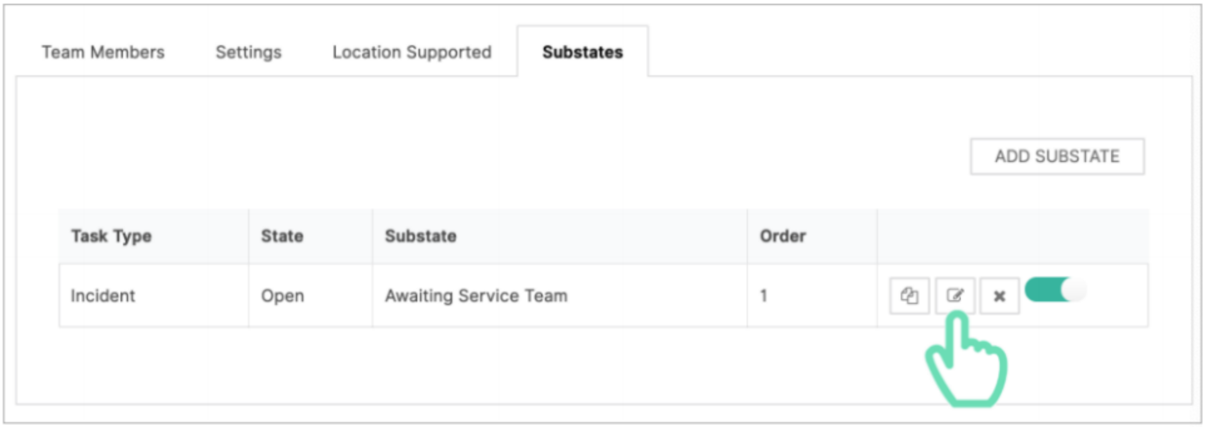
5. From here, you can specific **Task Type**, **State**, and **Substate** from any of the drop-down menus.
6. Click on **Order** and type a number.

   This will set a hierarchy between Substates and how they are displayed within the case card options.



The new Substate will appear on a table where you can duplicate, edit, or delete it. You can also Enable or Disable any Substate as well. If you don't want a specific Substate to show up as an option on the case card, disable it by turning the Active toggle off on the right.

- To duplicate a Substate's attributes, click on the **Duplicate** icon.
- To edit a Substate, click on the **Edit** icon.
- To delete a Substate, click on the **X** icon.



Notifications

A notification on the Barista Home Feed, email, or mobile app push notification will be sent to you under the following conditions:

- When the Technical Coordinator assigns a Service Lead of the Service Team, the designated Agent will receive a notification.
- When the Service Lead invites each member to the Service Team, these agents will receive a notification.
- When a case is assigned to a Service Lead or Service Agent, this agent will receive a notification.
- When a case is assigned to a Service Team but contains no assigned agent, Service Leads will receive the notification (this is modifiable via a new configuration).
- When a case is created or resolved by an agent, a notification will be sent to the caller/requester.