Espressive

PRODUCT DOCUMENTATION

Barista Case Management
User Guide

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Updated: August 2023

Overview

This document will guide you on how to use the Barista Case Management capabilities within the Barista application. Barista Case Management is a modern and powerful ticketing solution to enable any service desk to automate, track, and respond to employee questions across the enterprise, including those related to equipment issues, connectivity, VPN, and working from home.

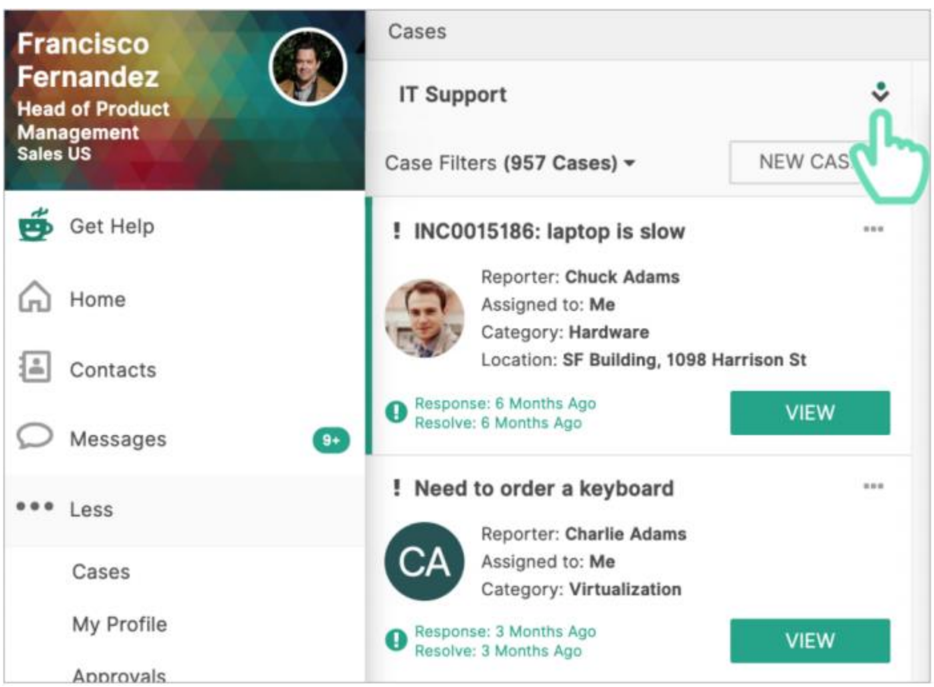
Accessing the Case Feed

In the Barista Case Management application, there is a section called Case Feed where you can find all case cards (tickets) displayed according to the Service Team you defined.

Follow these steps to access the Case Feed:

1. Log into your Espressive Barista account.
2. From the menu on the left, click on **More**.
3. Click on **Cases** to launch the Barista Case Management application.
4. Locate the Service Department (e.g. IT Support) and click on the **Arrow** icon.
5. Select the **Service Department** from the drop-down menu.

   If you belong to just one team, you will not see this option.



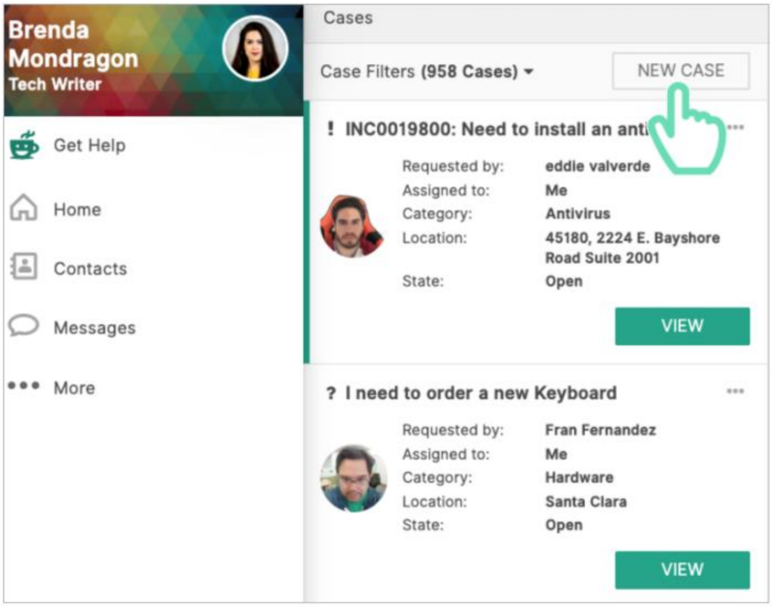
Note: If you do not see the Cases menu option, it means that you are not part of a Service Tam. Please reach out to your System Administrator to be added to the appropriate Service Team(s).

Creating a New Case

On top of the Case Feed, next to the Case Filters, you will find the **NEW CASE** button. Selecting this allows you to create new case cards (tickets).

Follow these steps to create a new case:

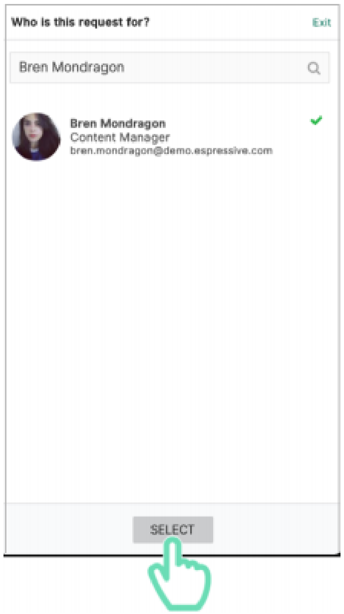
1. From the Barista Case Management application, click on the **NEW CASE** button on the top right corner of the Case Feed. This will open a new pop-up window.



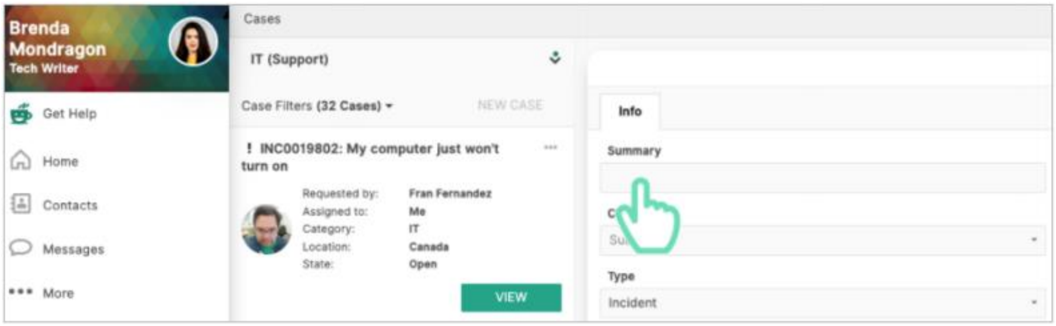
2. Search for the requestor's name and click on it.

   Note: To cancel out of creating a new case, click on the ***Exit*** *option located in the upper right and the pop-up window will close.*

3. Click on the SELECT button when finished. This will navigate you to an empty task form.



4. In an empty task form, locate the Info tab of your new case.



5. Type a description of the case in the Summary field.
6. Select a Category from the drop-down menu.

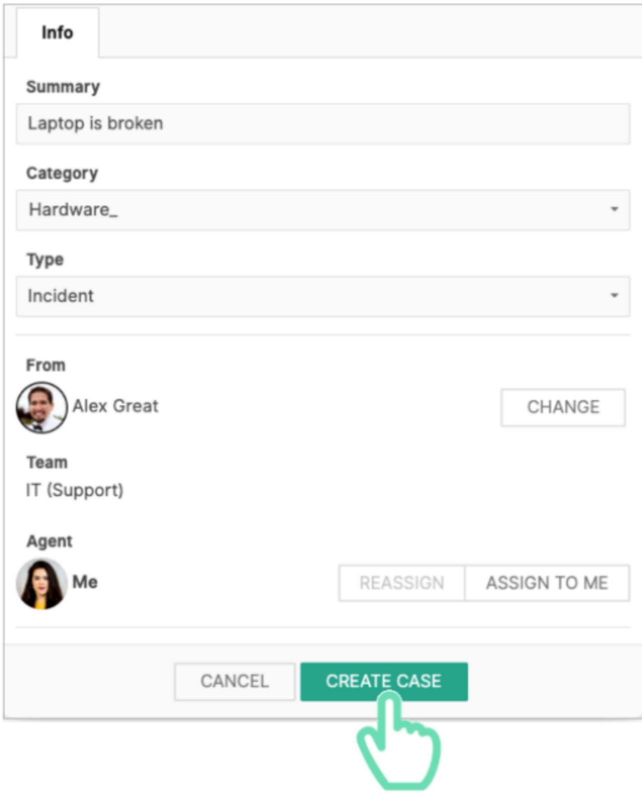
   Note: If you do not see the Category you need, please ask your System Administrator to add it to the corresponding Service Team.

7. Select a Type of case.

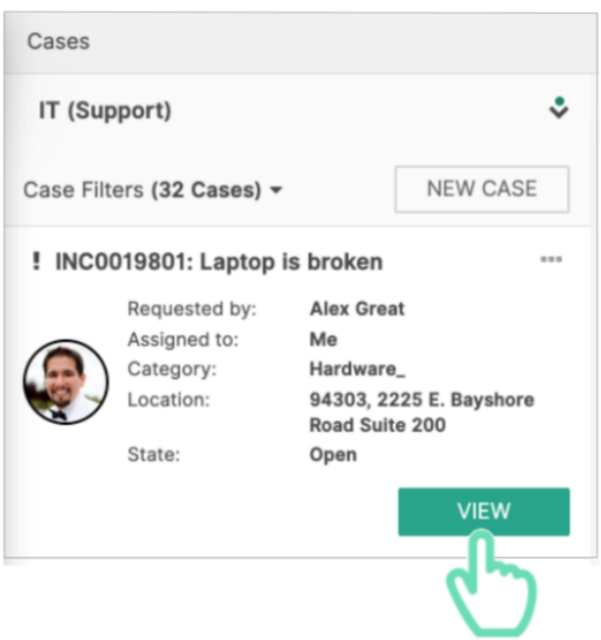
<table>
<tr><th colspan="6">Case Types</th></tr>
<tr><td colspan="2">Case
Typically used as the primary Task Type for non-IT departments. For IT, this is intended for the fielding of inbound calls before determining the appropriate task type, if needed.</td><td colspan="2">Incident
Typically used for IT to record unplanned interruptions to services, applications, and/or equipment (e.g., laptop is broken).</td><td colspan="2">Service Request
Intended for requests that are not product related (e.g., application access requests).</td></tr>
<tr><td colspan="3">Catalog Request
Captures a product-oriented request that needs to be ordered, typically some type of hardware or application (e.g., ordering a laptop)
Note: This is only available as a Subtask.</td><td colspan="3">Action Items
Intended as a way to track a specific individual task or “to-do” type item (e.g., expert troubleshooting).
Note: This is only available as a Subtask.</td></tr>
</table>

8. The **Location** will be automatically set based on the user’s location. If needed, you can edit the location by clicking the **Change Location** button.

9. Click on the **CREATE CASE** button when finished. Your new case card will appear in the Case Feed on the left.



10. Click on the **VIEW** button of the case card and navigate to the Info tab whenever you need to update the information.

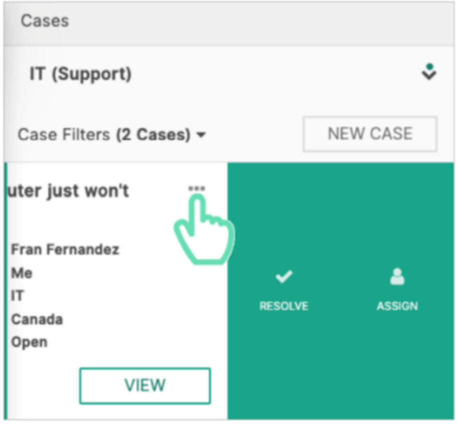


Navigating the Case Card

After the case/task is created, a new case card will be displayed in the Case Feed with a subset of fields and associated values. Notice there is a thick, vertical colored bar on the left-hand side. This colored bar shows that this card is the current record being viewed.

Follow these steps to navigate inside the case card:

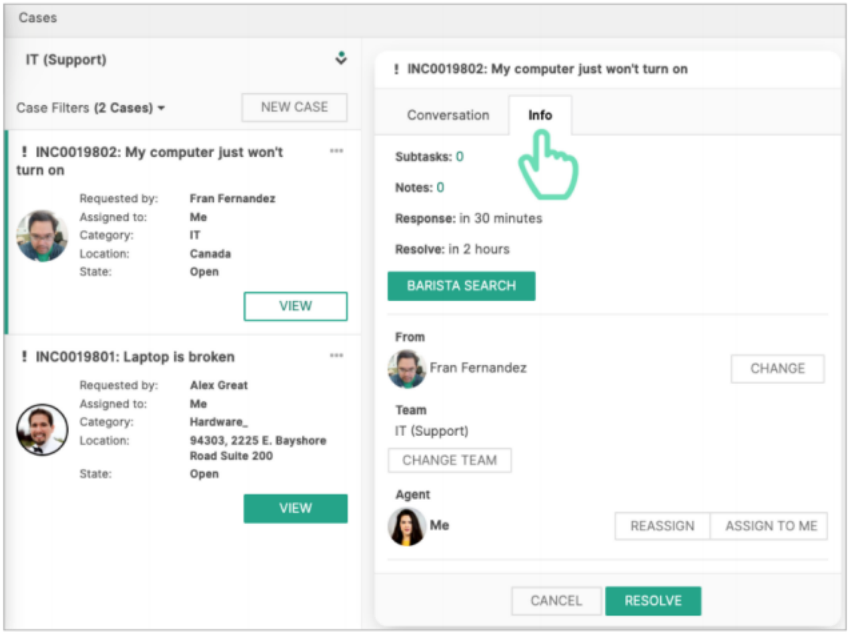
1. Click on the **Ellipsis** icon to display the quick actions available for that current card based on its current state (e.g. opened cases have quick actions for resolving and re-assigning the case).
2. Click on the Ellipsis icon again to hide the quick actions.



3. Click on the **VIEW** button of any card.

   The **Conversation** tab will display by default. If this is a case created by Barista, here you can read the conversation that lead to the ticket creation. The **Conversation** tab is shown first in order to assist you in maintaining multiple conversations with end users across all your open tickets.

4. Click on the **Info** tab.



In this section, you can update and modify the record while your case is still open. You can also see the date that the case was last updated and when it was assigned.

Within the **Info** tab, you can:

- Use **Barista Search** by clicking on the button. *Learn more about Barista Search here.*
- Change the **Requestor** by clicking the **Change** button to the right of the requester's name.
- Change the **Service Team** by clicking the **Change Team** button.
- Reassign an **Agent** by clicking the **Reassign** button to the right of the agent's name.
- Assign yourself to the case by clicking on the **Assign to me** button.
- Change the **Location** by clicking on the button.
- Update the case **Summary**, **Category**, or **Type** if needed.
- Add notes to the case.
- Add a **Subtask** by clicking the **Add Subtask** button. *Learn more about Parent Tasks and Subtasks here.*
- **Cancel** or **Resolve** the case by clicking on the respective button.

Parent Tasks and Subtasks

Barista provides the ability to add subtasks as child records to a parent (i.e., the original) case/task. This is useful for when you need to assign certain components of a case to different individuals, in order to complete the initial question, issue, or request. For example, if an employee calls about a faulty monitor, the subtasks can be used to pull in a subject matter expert for additional troubleshooting, for ordering a new monitor, and for installing it.

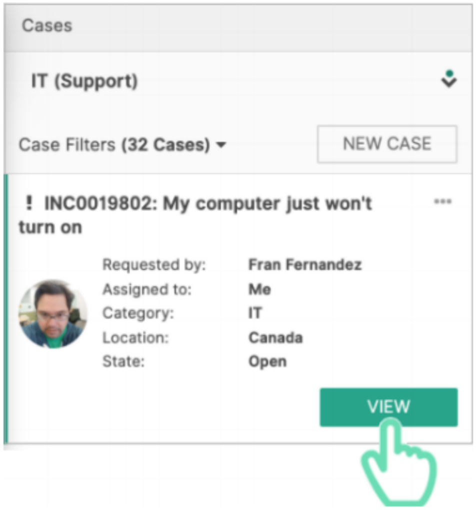
The following table shows the available parent tasks and subtask types:

<table>
<tr><th colspan="5">Case Types</th></tr>
<tr><td>Available as Parent Tasks Subtasks</td><td>Case
Typically used as the primary Task Type for non-IT departments. For IT, this is intended for the fielding of inbound calls before determining the appropriate task type, if needed.</td><td colspan="2">Incident
Typically used for IT to record unplanned interruptions to services, applications, and/or equipment (e.g., laptop is broken).</td><td>Service Request
Intended for requests that are not product related (e.g., application access requests).</td></tr>
<tr><td>Only Available as Subtasks</td><td colspan="2">Catalog Request
Captures a product-oriented request that needs to be ordered, typically some type of hardware or application (e.g., ordering a laptop)</td><td colspan="2">Action Items
Intended as a way to track a specific individual task or "to-do" type item (e.g., expert troubleshooting).</td></tr>
</table>

Note: Only one level of subtasks is currently supported. A parent task can contain numerous subtask child records, but subtasks cannot themselves contain subtask child records. Therefore, subtask creation is always initiated at the parent task layer. Having subtasks is considered an advanced functionality for organizations with multi-layered process. It is not required to use subtasks.

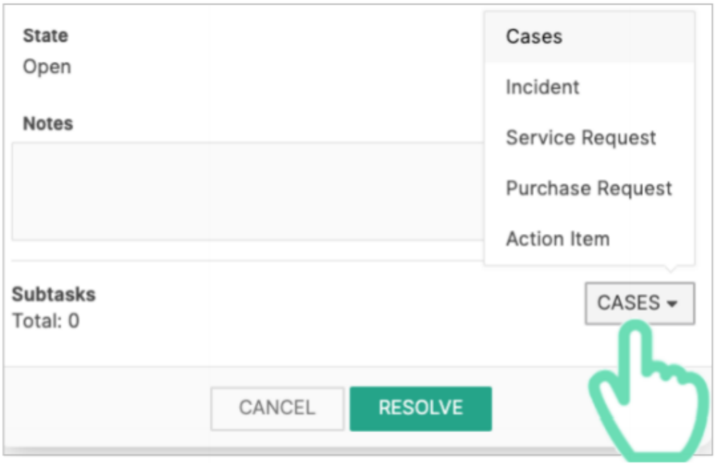
Follow these steps to add a subtask:

1. Within the Case Feed, click on the **VIEW** button of a case card. The **Conversation** tab will be displayed by default.



2. Select the **Info** tab to the right of the **Conversation** tab.
3. Click the **Add Subtask** button. A new menu will display.
4. Select a type of case for the subtask by clicking the **CASES** button and selecting from the drop-down menu options. This will navigate you to the **Info** tab of your new subtask.

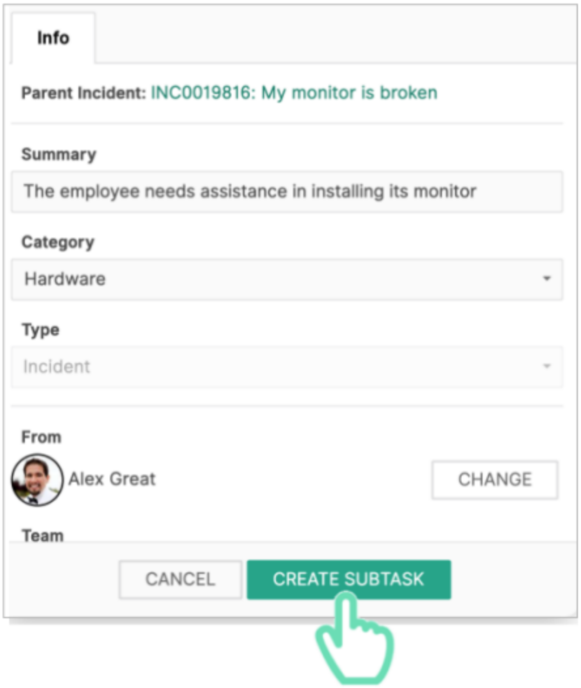
   On top, you will see the name and link of the parent task.



5. Type a description of the subtask in the **Summary** field.
6. Select a **Category** for the subtask from the drop-down menu options.

7. Click on the **CREATE SUBTASK** button when finished.

   The card for your new subtask will now appear on the Case Feed.



Types of Case States

The case states are as follows:

- OPEN: Utilized from the initial creation of a task, to assignment, and finally through the associated work being performed.
- RESOLVED: Signifies that a task is resolved/completed.
- CANCELLED BY AGENT: Signifies that the task has been marked as no longer needed by the assigned agent.
- DISCARDED: Signifies that the task has been marked as a candidate for deletion.

These values are not manually set. They are controlled by selecting the appropriate button at the bottom of each record/case card.

Barista Search

Agents can use Barista Search to find a prescriptive answer to an employee request, which can then be automatically inserted into the conversation with that employee. Barista Search uses the text typed into the Summary field as the initial search and then provides the top five FAQ results associated with that search.

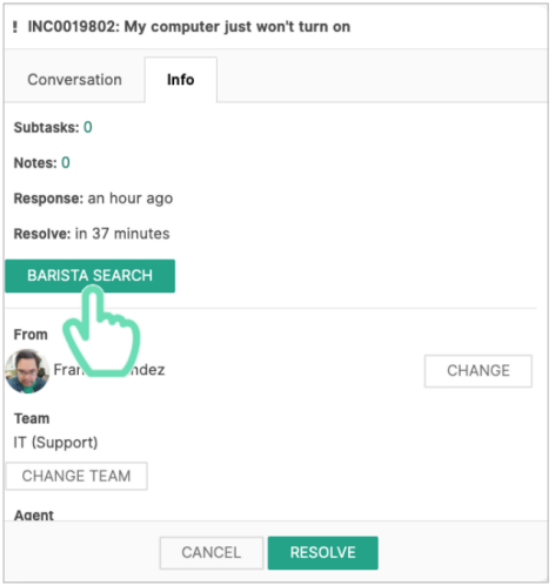
Note: To use this capability, the case must be in an "Open" state.

Follow these steps to use Barista Search:

1. Within the Case Feed, click on the **VIEW** button of any card.
2. Click on the **Info** tab to the right of the **Conversation** tab.

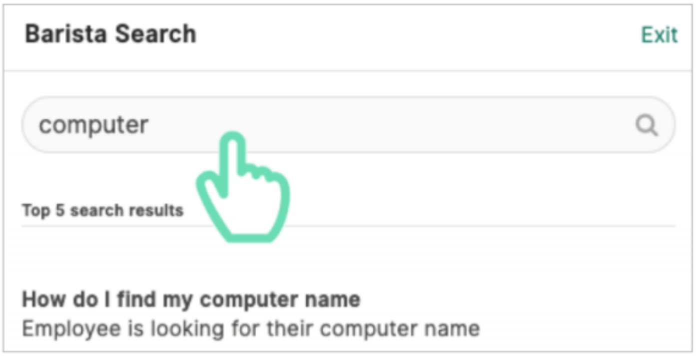
   The **Conversation** tab will be displayed by default.
3. Click the **BARISTA SEARCH** button located near the top.

   This will open a new pop-up window.

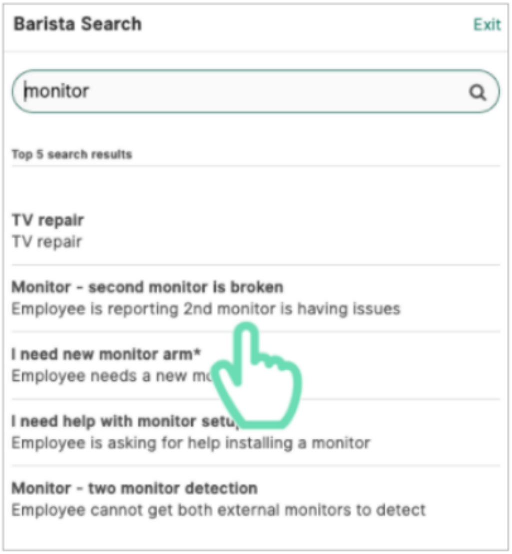
4. Search for an answer using keywords related to the initial question.

   The text from the **Summary** field will be used to initially populate this search.

5. From the search results provided, click on the one that is most relevant to your case.

   This will launch a conversation with Barista, the virtual support agent.



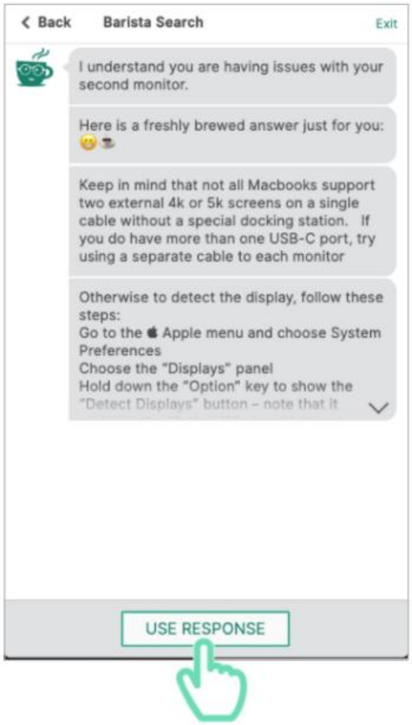
6. Walk through the conversation until it ends.

   A **USE RESPONSE** button will appear at the bottom when the conversation is complete.

7. Click on the USE RESPONSE button if this is the answer you want to provide to the employee.

   This will navigate you to the Post Response Option screen.

   Note: If this is not the response you want to use, you can check the other search results by clicking on the Back option at the top left corner. Barista Search results show FAQs that you have enabled using the Barista FAQ Dashboard. Learn more about Barista FAQs in our document, [Navigating and Filtering Inside the FAQ Management Tool](#).

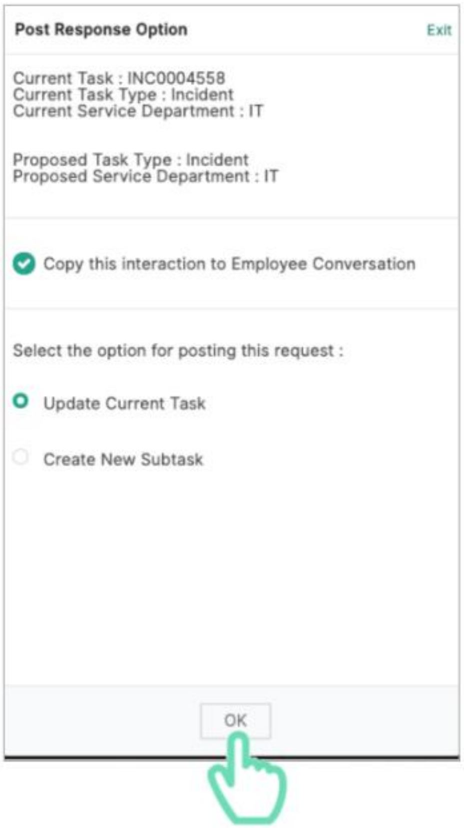


8. The option **Copy this interaction to Employee Conversation** will be marked by default.

   On the top, you will see information for your case plus any tasks proposed by Barista, in case you decide to create a subtask.

9. Select one of the two options for posting the request:

   - UPDATE CURRENT TASK: Use this option to post the selected response in the current conversation with the employee.
   - CREATE NEW SUBTASK: Use this option to post the selected Barista response in a new subtask.



   Learn more about Parent Tasks and Subtasks here.

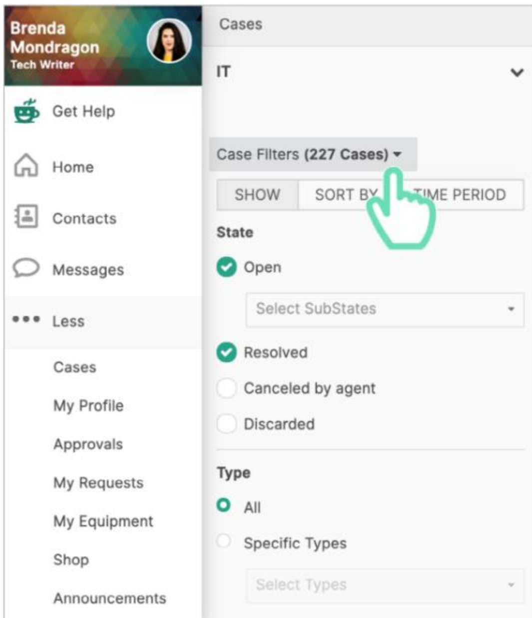
10. Click on the **OK** button when ready to submit this answer. This will navigate you back to the **Conversation** tab of your case card. The Barista response you selected will be automatically added to your conversation with the employee.

Using Case Filters

On top of the Case Feed, there are Case Filters to sort case cards/tasks. In the parentheses, you can see how many cases there are for a Service Team.

Follow these steps to use the Case Filters:

1. Click on **Cases** to launch the Barista Case Management application.
2. Click on **Case Filters**. The **Show** tab will display by default.
3. Select the sort options of your preference.



   Click on the **Show** tab to sort cases by:

   - STATE OR SUBSTATE: Open, Resolved, Cancelled by Agent, or Discarded.
   - TYPE: All, Action Item, Case, Incident, Purchase Request, or Service Request.
   - ASSIGNED TO: All, Me, Specific Agent, or Unassigned.
   - REQUEST BY: All, Me, or Specific People.
   - LOCATION: All or Specific Location.

   Click on the **Sort By** tab to sort cases by:

   - TIME: Last updated or created date (newest to oldest or oldest to newest).
   - ALPHABETICAL: Assigned Agent, Reported, or Location. Sort cases by Ascending A-Z or Descending Z-A.

   In the **Time Period** tab, you can choose to filter cards based on time range, including the last 15 minutes, last half hour, last 4 hours, last 7 days, or last 30 days.

4. Click on **Case filters** again to hide the drop-down menu.