

# Jira Service Management Manual - final version

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## Introduction

Jira Service Management is a system that allows clients to communicate with the XTM Support team via a dedicated Customer Portal. XTM encourages each client to access the portal if any issue or question may arise.

Please, be advised that in order to deliver the maximum customer experience and expedite the resolution of cases we have temporarily switched off our support email.

**Link to the Portal:** <https://xtm-cloud.atlassian.net/servicedesk/customer/portals>

## Customer Portal

### Main view

The screenshot shows the XTM Customer Portal main view. At the top left is the XTM logo. At the top right is a 'Requests' button with a notification icon. Below the header is a search bar with the text 'Find help and services'. The main content area is divided into sections: 'Featured' with three cards for 'XTM Application Support', 'Connectors Support', and 'Asset Migration'; 'Recently used forms' with two items; and a footer indicating it is powered by Jira Service Management.

1. **XTM Application Support** - this product allows you to create a ticket if your request is linked to the XTM application.
2. **Connectors Support** - this product allows you to write to our specialists who will help you with various connectors XTM has to offer.
3. **Asset Migration** - this product allows you to migrate your data from another system to XTM (for example, the translation memory import from another CAT tool).
4. **Recently used forms** - this section allows you to view whatever you were doing recently in the Customer Portal. It also allows for easy access to your frequent requests.
5. **Search bar** - this allows you to:
  - a. find articles in our Knowledge Base;
  - b. a quick search for ticket request forms, without the need to click through products and categories.
6. **Requests** - this section contains a list of tickets created by you, your organization, or other co-workers.

### Requests view

# Requests



1 Request contains...  
2 Status: Open requests 
3 Created by me 
4 Request type

Type	Reference	Summary	Status	Service project	Requester
	SUP-68	test buga 2	BYPASS DEPLOYED	XTM Application Support	Support team
	SUP-66	test delivery	PENDING	XTM Application Support	Support team
	SUP-44	test auto 2	CLOSED	XTM Application Support	Support team
	SUP-56	test	WAITING FOR YOUR FE...	XTM Application Support	Support team
	SUP-40	test wfra	WAITING FOR YOUR AP...	XTM Application Support	Support team

- 1. Searchbox** - it allows you to insert phrases to find your requests more quickly. Please, keep in mind, however, that it searches only for **exact phrases** and; for example, it recognizes *bug* and *bugs* as separate words.
- 2. Status** - this filter allows you to search tickets with a specified status in all products that are available to you.
- 3. Created by** - this filter allows you to distinguish between tickets that you created personally, tickets that were created by your organization, and the ones that were shared with you (you were invited as a participant by a ticket requester).
- 4. Request type** - if you are interested in filtering out tickets of a specific type, this filter allows you to select the desired ticket type.
- 5. Options** - this section allows for specifying the number of columns displayed.

## Creating your first request

### XTM Application Support

Raise a request for the XTM Application Support using the options provided.

- Select the desired product.

## XTM Application Support

Raise a request for the XTM Application Support using the options provided.

### ☑ Contact us about

- I have a standard request** >

Request SSO, Request assistance, Feature or enhancement request, Configuration request
- I experience an issue in the application** >

Report issue with analysis, Report bug, Report Workbench issue
- I experience severe problems with the application** >

Report performance issue, Report security or privacy issue, Report service or part of application unavailable
- I have a question or would like to request other actions** >

Ask question, Other technical requests

- Select one of the categories available. In this example, you will be asking a question.

1. In case you selected the wrong category of the request, you can quickly cycle through to the desired one using this drop-down.

## XTM Application Support

Raise a request for the XTM Application Support using the options provided.

1 Contact us about  
General

2 What can we help you with?  
Ask question  
In case you have a question about some XTM functionalities, please feel free...

3 Summary\*

Attachment  
Drag and drop files, paste screenshots, or browse  
Browse

Please attach anything that might be relevant to your question

Are you creating your first ticket in this portal?  
No

Is this a question related to a project?  
No

Is this a question related to subcontracted work?  
Please select the correct option to allow us to help you even faster.  
Select...

Which part of XTM this question is related to?\*

In order to help us get you in touch immediately with an expert, please take some time to pick a proper part of XTM linked to your request.

2. This drop-down works similarly to the one above but allows you to change the request type within the same category.
3. This is a standardized request form you can see across different request types. Some fields are obligatory but, as a rule of thumb, we kept these to a minimum.

Please note that each request form has been created after reviewing years of our experience as customer support. What you have before you is the bare minimum of required information for the request to be resolved fast and to your satisfaction. We encourage you to provide as much details as possible each time you create a request.

4. When you are satisfied with the data you provided, just hit the Save button, and your ticket will be created.

## Ticket view

1 XTM Support / XTM Application Support / SUP-73  
test question

2 Jaroslaw Kaczmarek raised this on Today 16:07 Hide details

Viewing Form

Question form

Are you creating your first ticket in this portal?  
Yes

Company name  
Please help us locate your account. More on Company names [HERE]  
Test company

XTM URL  
To answer your question faster, please paste here your XTM URL. More on XTM URL [HERE]  
https://login.xtm.cloud/

Is this a question related to a project?  
No

Is this a question related to subcontracted work?  
Please select the correct option to allow us to help you even faster.  
NO

Which part of XTM this question is related to?\*

In order to help us get you in touch immediately with an expert, please take some time to pick a proper part of XTM linked to your request.

Status 3  
UNDER REVIEW

Notifications on 4

Cancel this ticket 5

Close this ticket 5

Request type  
Ask question

Shared with  
Jaroslaw Kaczmarek  
Creator

+ Share 6

1. **The navigation panel** - allows you to quickly get back to a given part of the Customer Portal.
2. **Ticket properties** - this section displays the details of your request. The *Hide details* button will hide this section.
3. **Status** - this part of the display allows you to verify what state the ticket is in.
4. **Notifications on** - this button allows you to cease incoming notifications with regard to this ticket; it is particularly useful if you are not an active participant in a given case.
5. **Actions available** - these buttons allow you to cancel, close, or escalate a given case. Please, note that some actions can be performed only at certain stages of the ticket resolution process.
6. **Share** - this button allows you to share the ticket with a selected individual or your organization. In the latter case, the ticket will become available to all users who are part of your organization in the ticketing system.

## Activity



Add a comment

- This section of the ticket displays various activities that occurred in the ticket, mostly your message exchange with the XTM Support team.
- In the field *Add a comment* you can reach out to the assigned agent with any additional information and/or questions you might have.

## FAQ

### Q: When can I escalate my ticket?

A: Currently the escalation is available only if a given ticket is pending on the XTM side and the case is not closed or otherwise resolved.

### Q: What does it mean to escalate a ticket?

A: Escalation is a means for you to signal that the priority of the submitted request has just changed and is different than it was initially broadcasted. XTM will do its best to include your escalation and feedback in the ticket processing flow, however, we reserve the right to adhere to the official SLA agreement at peak times.

### Q: How does ticket sharing work?

A: If you are a requester belonging to an organization that already has a presence in our ticketing system, then if you access the **Share** section of your ticket, you can search through people in your organization and select specific collaborators. If you wish to make your ticket available for everyone in your organization, instead of a user you input the organization name. However, if you are not a part of an organization or simply want to invite a person you know to collaborate on a case with you, you can simply put a proper user email in the share box and the system will send a proper invite.

### Q: How does a ticket lifecycle look like?

A: After you create your request, it immediately lands on the Support Management's ticket list where it goes through layers of verification just to make sure you are connected with the best expert in a given field. After the ticket is initially processed, the assigned agent conducts a ticket analysis. If resolving requires input from internal XTM teams (like development) the ticket is escalated.

If we were fixing a bug you reported, upon completion of the development process, the assigned Support Engineer will mark the ticket as **Ready to be delivered**, and soon after XTM update action will be scheduled.

However, if your request was not a bug report, then we will put your ticket at **Waiting for your approval** status. The system will wait for a couple next days before the ticket automatically closes.

### Q: How do I reopen a closed ticket?

A: If your ticket is closed you only need to write in it. A system will automatically create a new ticket, with you as a requester and the Support Management will expedite it through internal channels.

### Q: Do I have to fill in all ticket form fields?

A: The answer is: no. But since each such field invites you to share some details that are crucial to solving the reported case in a swift and efficient way, it is advised to put in as much information as you can. Depending on the case, the assigned agent can ask you some additional questions if some of the information is not delivered.

### Q: Why can I set the priority only for some of the requests?

A: We recognize the intrinsic urgency of some cases like *the server being unavailable* or *the TM manager not opening* and these types of tickets will always be marked by us as Urgent/Severe. On the other hand, there will be some types of requests that would require your input to help us understand the priority and business impact behind them- in those cases we made proper fields available to you.

### Q: I cannot format the text in my tickets.

A: This is a feature we are looking now to introduce to better your user experience.

### Q: I cannot insert inline images in my tickets.

A: Regrettably, this is a limitation of the ticketing tool but our engineers are looking into finding a solution to it.

### Q: What is the upload size limit?

A: The current maximum upload size for your file is 24 MBs.

**a) provide a better onboarding experience b) automate work across teams.**