iMessage User Guide

1. Introduction

Welcome to the iMessage User Guide. This guide provides instructions and reference information to help agents efficiently manage tickets using the iMessage Portal.

1.1 Purpose of the User Guide

This user guide aims to help agents understand and perform the tasks required to manage tickets throughout their lifecycle. It provides step-by-step guidance on assigning, processing, transferring, resolving, and closing tickets.

1.2 Intended Users

This guide is intended for Agent Heads and Agent Users.

1.3 Scope of the Guide

This guide covers the functions available to agents including:

- Accessing the iMessage Portal
- Viewing and managing tickets
- Assigning tickets
- Processing tickets
- Transferring tickets
- Resolving tickets
- Closing tickets

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2. Overview of the iMessage Portal

The iMessage is the Commission's electronic helpdesk and ticketing system to facilitate handling, monitoring , and resolution of public inquiries, complaints, incidents and requests.

It serves as a centralized platform that enables clients to submit concerns and requests electronically, while allowing concerned offices to track, manage and resolve tickets in a timely and transparent manner.

2.2 Objectives

The iMessage aims to:

- Provide a centralized platform for receiving and managing inquiries and requests
- Monitor ticket status and service performance
- Facilitate coordination among concerned offices and personnel
- Maintain records and audit trails of actions taken
- Support data-driven management through reports and analytics

2.3 Ticket Lifecycle

This illustrates the standard workflow for handling tickets, from its creation to its closure. Depending on the nature of

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of the request, a ticket may be transferred to another office for processing.

01 New Ticket

02 Assign Ticket or Transfer, if necessary

03 Process Ticket

04 Resolve Ticket

05 Close Ticket

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3. User Roles and Privileges

The iMessage provides Agent Head and Agent User roles, each with specific privileges and access rights. The action that a user can perform depend on their assigned role.

FUNCTION	AGENT HEAD	AGENT USER
Search Ticket	✔	✔
View Ticket	✔	✔
Assign Ticket	✔	✔
Transfer Ticket	✔	✖
Reply to Ticket	✔	✔
Post Internal Note	✔	✔
Resolve Ticket	✔	✔
Create Canned Response	✔	✖

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4. Ticket Status

The iMessage provides different ticket statuses that indicate the current stage of a ticket in its a lifecycle. Understanding the purpose of each status helps agents track progress, perform the appropriate actions, and ensure tickets are processed efficiently.

STATUS	MEANING	WHEN TO USE
Open	Ticket is received and awaiting processing	Initial review to determine next action
For Evaluation	Ticket is under assessment	Request and requirements are being evaluated
For Compliance	Waiting for client compliance	Additional documents / information required
For Processing	Ticket is currently being processed	Action is on-going
For Payment	Waiting for payment of required fees	Payment required before processing continues
For Endorsement to Other Government Agencies	Waiting for another government agency's action	Requires endorsement pursuant to issued joint circular
For Approval	Awaiting approval	Approval by authorized personnel or official
Resolved	Request has been completed	Solution has been provided and no further action required
Closed	Ticket is officially completed	Automatically applied by the system

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5. Features and Functions

The iMessage includes the following key features:

FEATURE	FUNCTION
Post Reply	Enables an agent to post a reply to a ticket. Visible only to the client and concerned SEC internal users
Post Internal Note	Enables an agent to post a message and is not visible to the public
Assign Ticket	Enables an agent to assign a ticket to another agent for processing
Transfer Ticket	Enables the Agent Head to transfer a ticket to another department, division, or office
Canned Response	Enables the Agent Head to create preformatted response for common inquiries
Search Ticket	Enables an agent to easily locate specific tickets
Dashboard	Provides real-time overview of tickets including response time and service time

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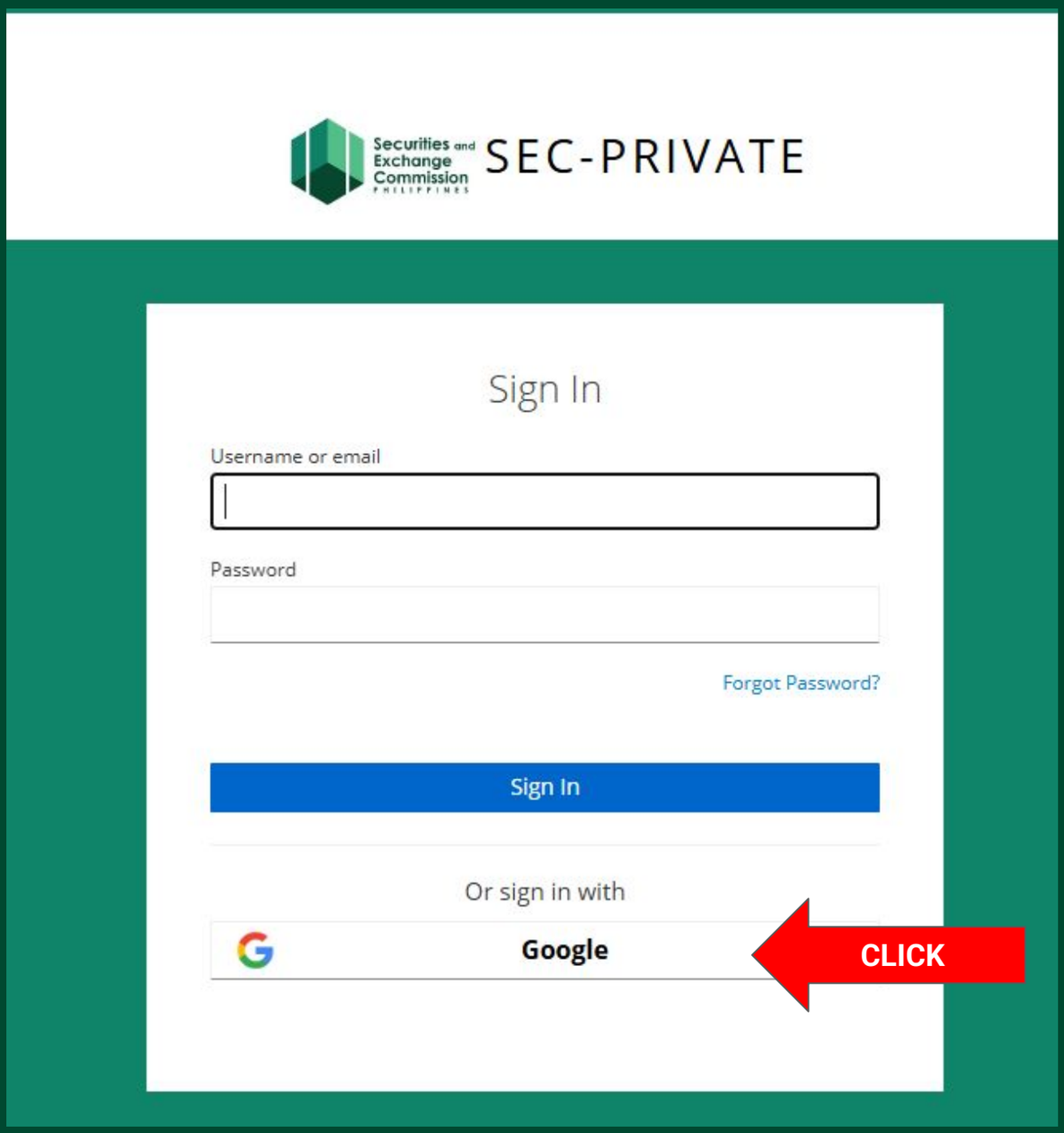
6. Logging-In to the iMessage Portal

1. Go to **https://imessage.sec.gov.ph/scp**
2. Sign in via the Google Single Sign On (SSO)



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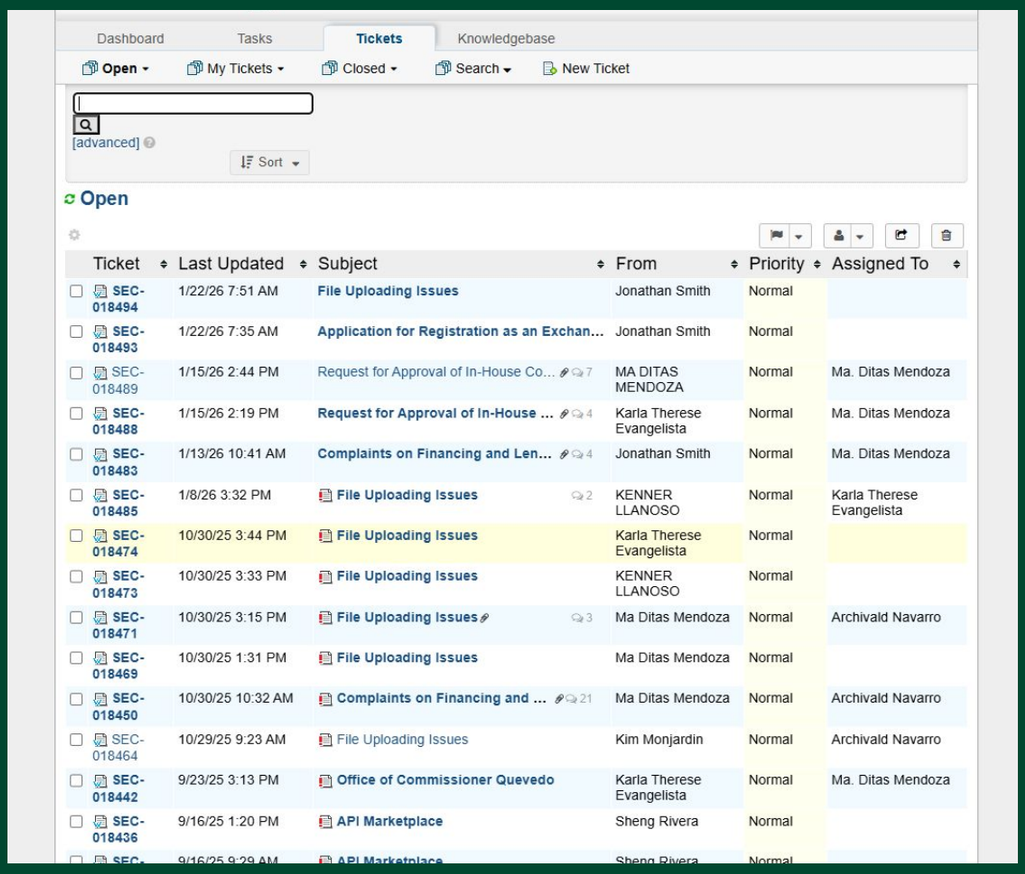
7. Assigning a Ticket

The system automatically routes a new ticket to the appropriate department, division, or office based on the help topic or service selected by the client.

An Agent Head receives the ticket for initial review. If the ticket information is correct and complete, the Agent Head assigns the ticket to an Agent User for processing.

Steps to follow:

1. From the list of open tickets, locate the ticket you want to work on



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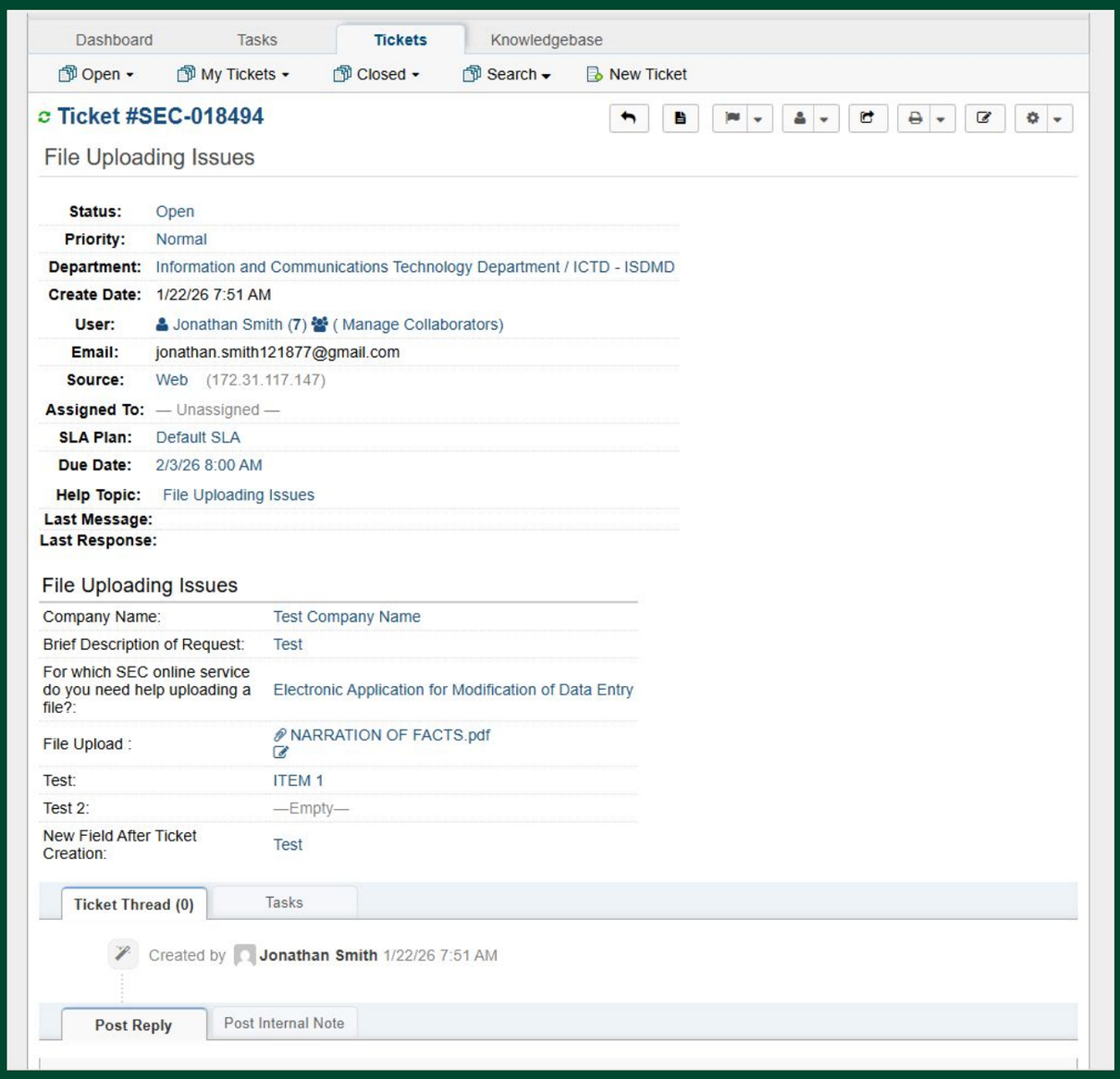
2. Click the ticket number or subject title to view its details
3. Review the full ticket details and any attached documents for completeness and accuracy



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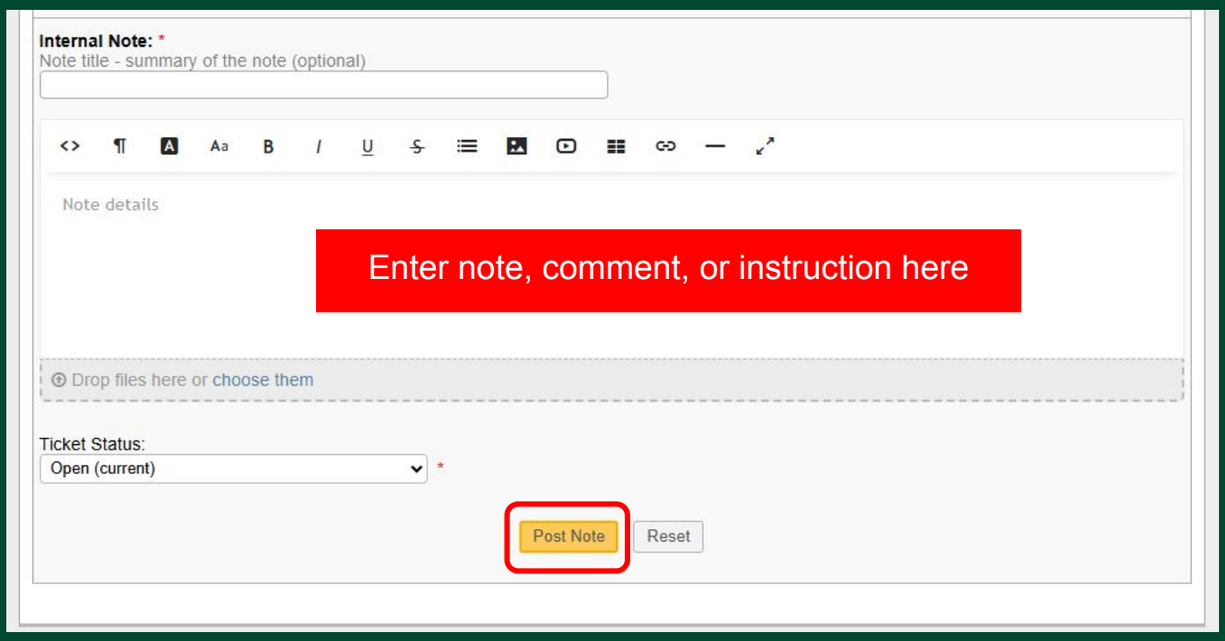
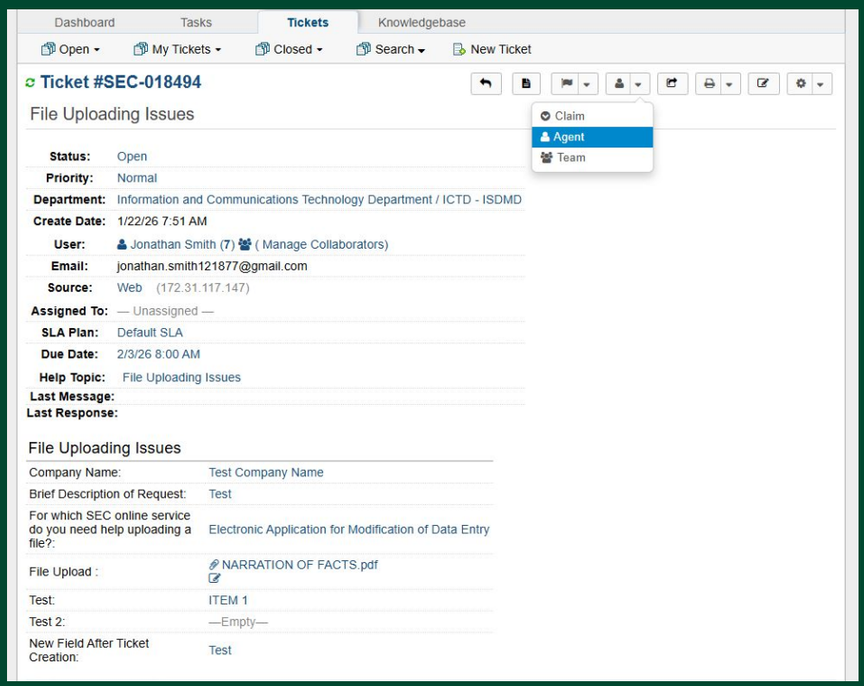
4. Enter your note, comment or instruction for processing in the **Internal Note** text field
5. Click **Post Note** button



6. Click the **Reassign** icon button at the top of the ticket page
7. Select **Agent**



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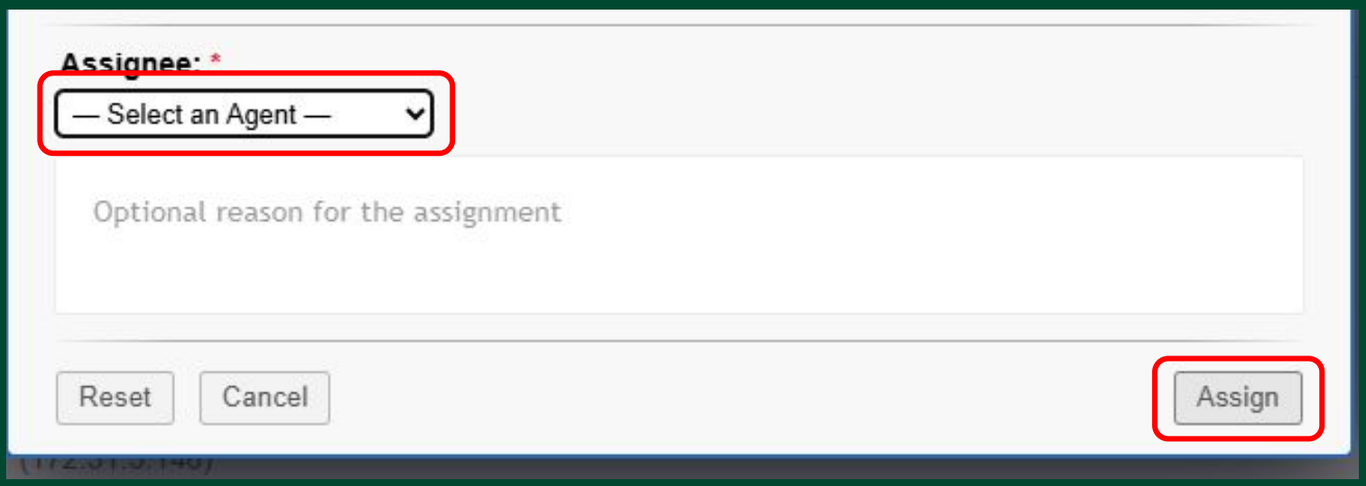
8. Click the **Select an Agent** drop-down list and choose an agent from the list
9. Click **Assign** button
10. Upon successful assignment, the ticket reflects the name of the selected agent



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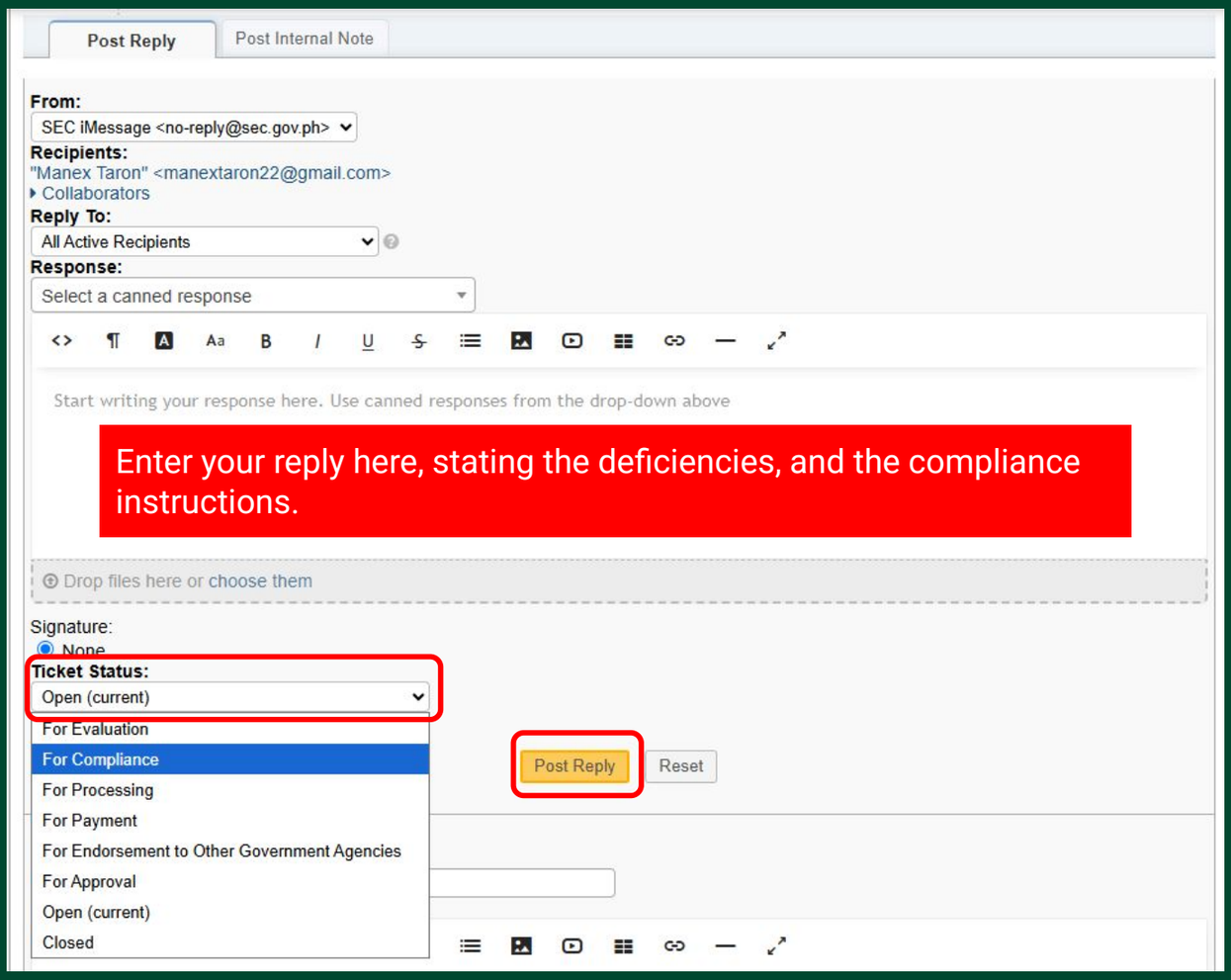
8. Processing a Ticket (For Compliance)

A ticket is returned to the client when it contains missing or incorrect information that prevents the agent from processing it.

Steps to follow:

1. View ticket details and enter your comment and/or instruction in the **Post Reply** text field
2. Click **Ticket Status** drop-down list and select **For Compliance**
3. Click **Post Reply** button



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9. Processing a Ticket (For Payment, For Processing, For Endorsement to Other Government Agencies)

Once a ticket has been assigned, the assigned Agent User reviews, performs the necessary action, and updates the ticket status throughout the processing lifecycle.

Steps to follow:

1. View ticket details and enter your comment, feedback, or instruction in the **Post Reply** text field
2. Attach supporting documents if needed (e.g. Payment Assessment Form)
3. Click **Ticket Status** drop-down list and select the appropriate ticket status. Refer to Section 4, **Ticket Statuses**, for the definition and when to use it.
4. Click **Post Reply** button

Note: For illustration, refer to the screenshot in Section 8, ***Processing a Ticket (For Compliance)***

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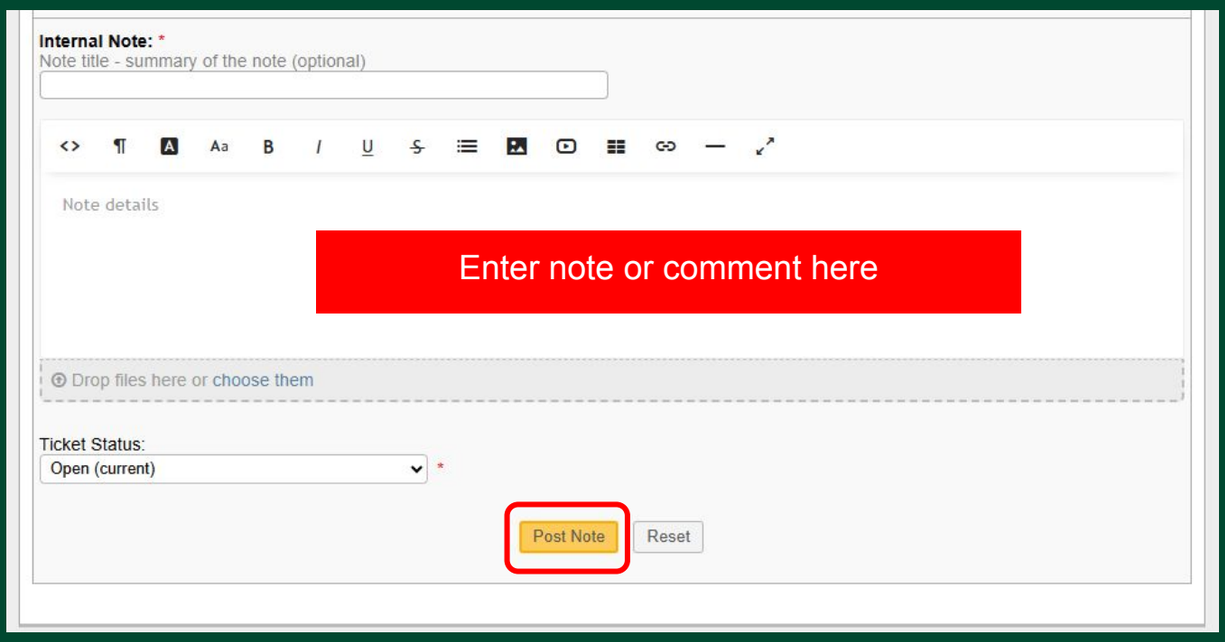
10. Processing a Ticket (For Approval)

Some tickets require approval before processing can continue or be completed. In such cases, the assigned agent endorses the ticket to the appropriate authorized personnel or officer.

Steps to follow:

1. View ticket details and enter your note or comment in the **Internal Note** text field
2. Click **Post Note** button



3. Click the **Reassign** icon button at the top of the ticket page
4. Select **Agent**
5. Click the **Select an Agent** drop-down list and choose an agent from the list

6. Click **Assign** button
7. Update the ticket status by clicking the ticket number or subject title
8. Enter your comment, feedback, or instruction in the **Post Reply** text field
9. Click **Ticket Status** drop-down list and select **For Approval**
10. Click **Post Reply** button

*Note: For illustration, refer to the screenshots in Section 7, **Assigning a Ticket**, and Section 8, **Processing a Ticket (For Compliance)***

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11. Resolving a Ticket

A ticket is resolved when a client's request or concern has been fully addressed and no further action is required from the SEC.

Steps to follow:

1. View ticket details and enter your comment or feedback in the **Post Reply** text field
2. Click **Ticket Status** drop-down list and select **Resolved**
3. Click **Post Reply** button

Note: For illustration, *refer to the screenshot in Section 8, **Processing a Ticket (For Compliance)***

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12. Closing a Ticket

The system automatically closes resolved tickets.

If a ticket remains in the **Resolved** status for three (3) calendar days without any reply or further action from the client, its status is automatically updated to **Closed**.

Once a ticket is **Closed,** the client can no longer reply to or reopen it. Any additional concern must be submitted as a new ticket.

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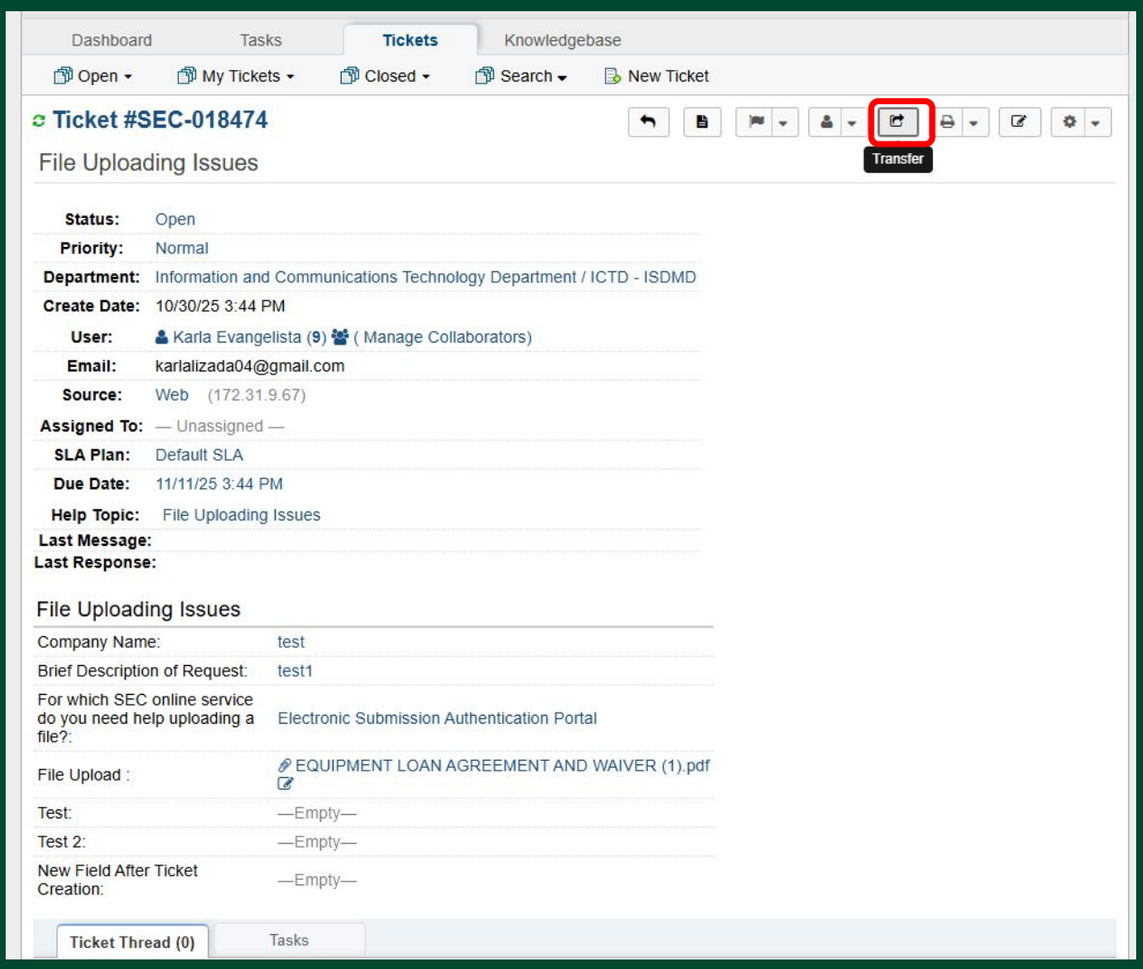
13. Transferring a Ticket

Tickets received by a department, division, or office that are outside its jurisdiction can be transferred by the Agent Head to the appropriate processing unit.

Steps to follow:

1. View ticket details and click the **Transfer** icon button at the top of the ticket page



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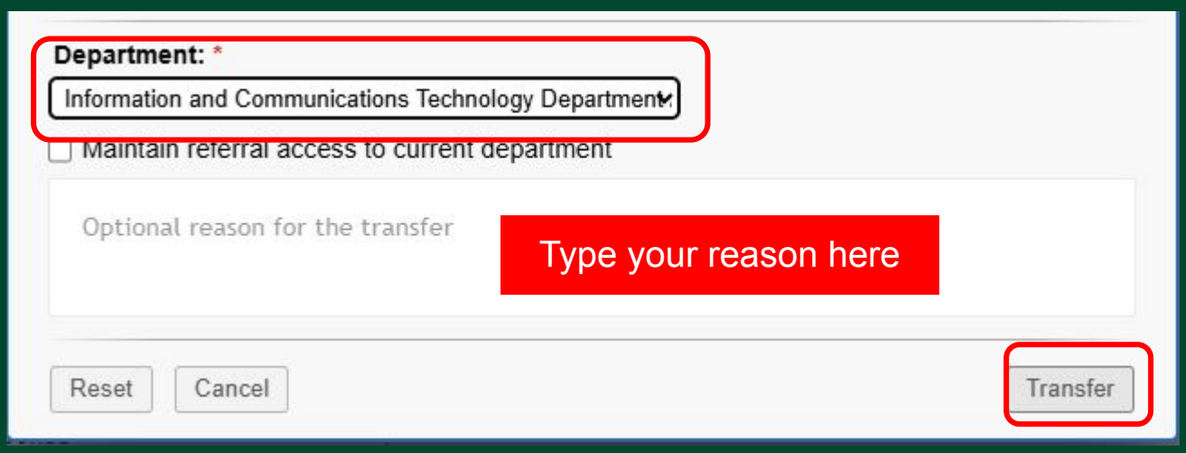
2. Click the **Department** drop-down list
3. Select the department, division, or office to which the ticket will be transferred
4. Enter reason for the ticket transfer
5. Click **Transfer** button



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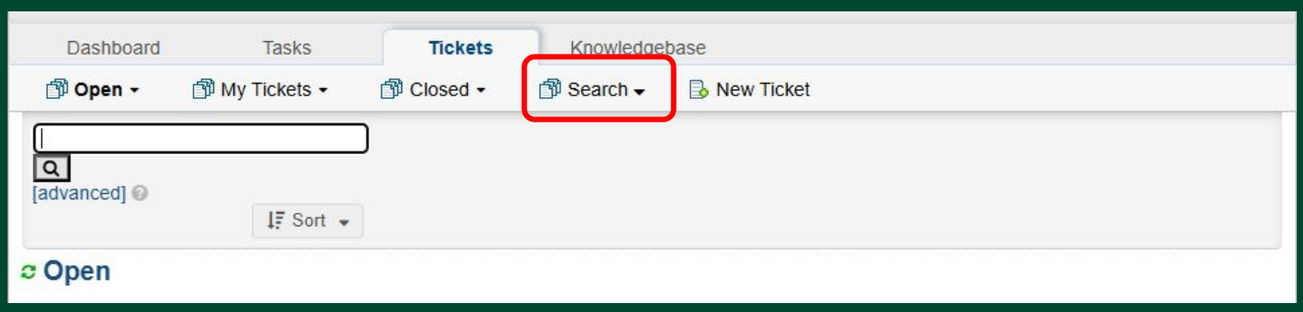
14. Searching and Filtering Tickets

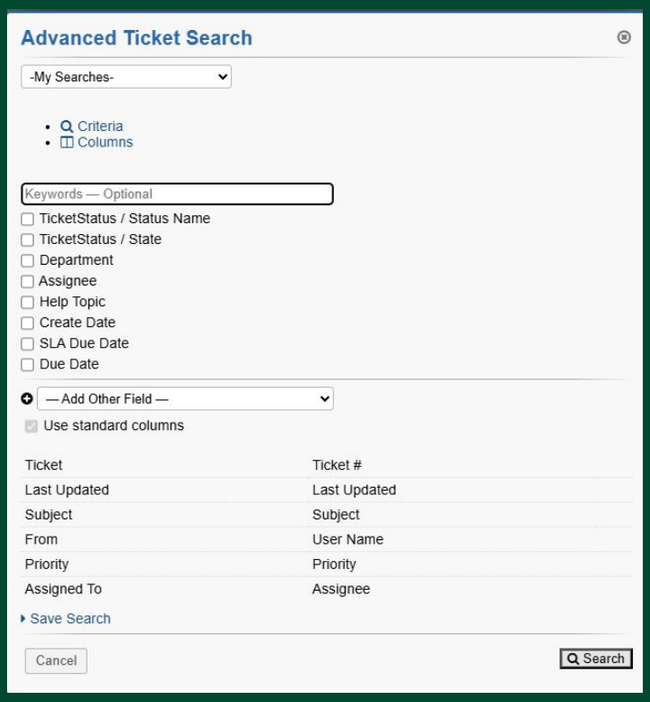
The search and filter functions help agents quickly locate tickets based on specific search criteria, making it easier to manage and monitor ticket records.

Steps to follow:

1. Click **Search** menu in the top navigation bar



2. Filter tickets using multiple parameters such as keywords, ticket status, assignee, or help topic



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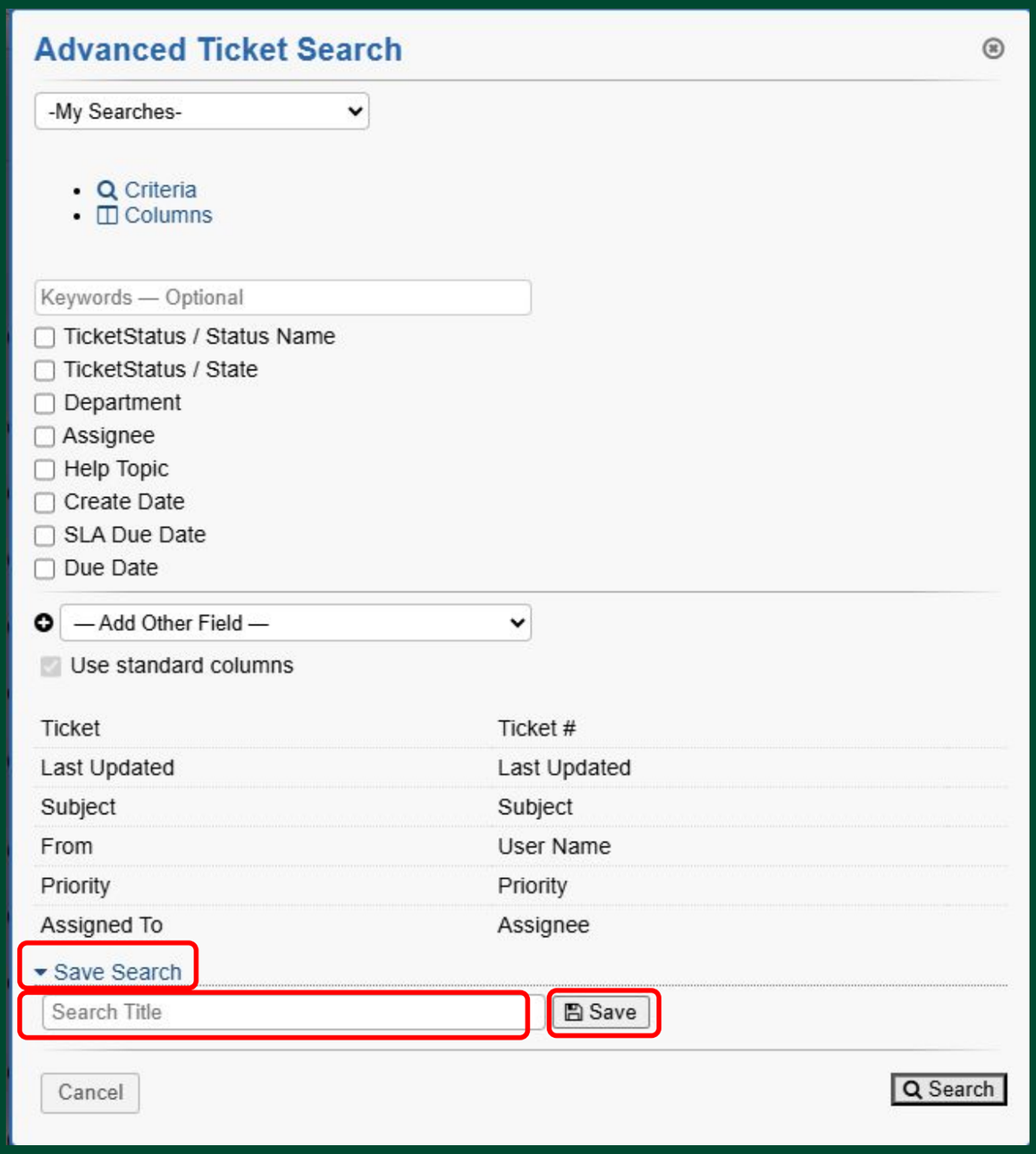
3. Click **Save Search**
4. Enter a title in the **Search Title** text field
5. Click **Save** button to keep it for future use



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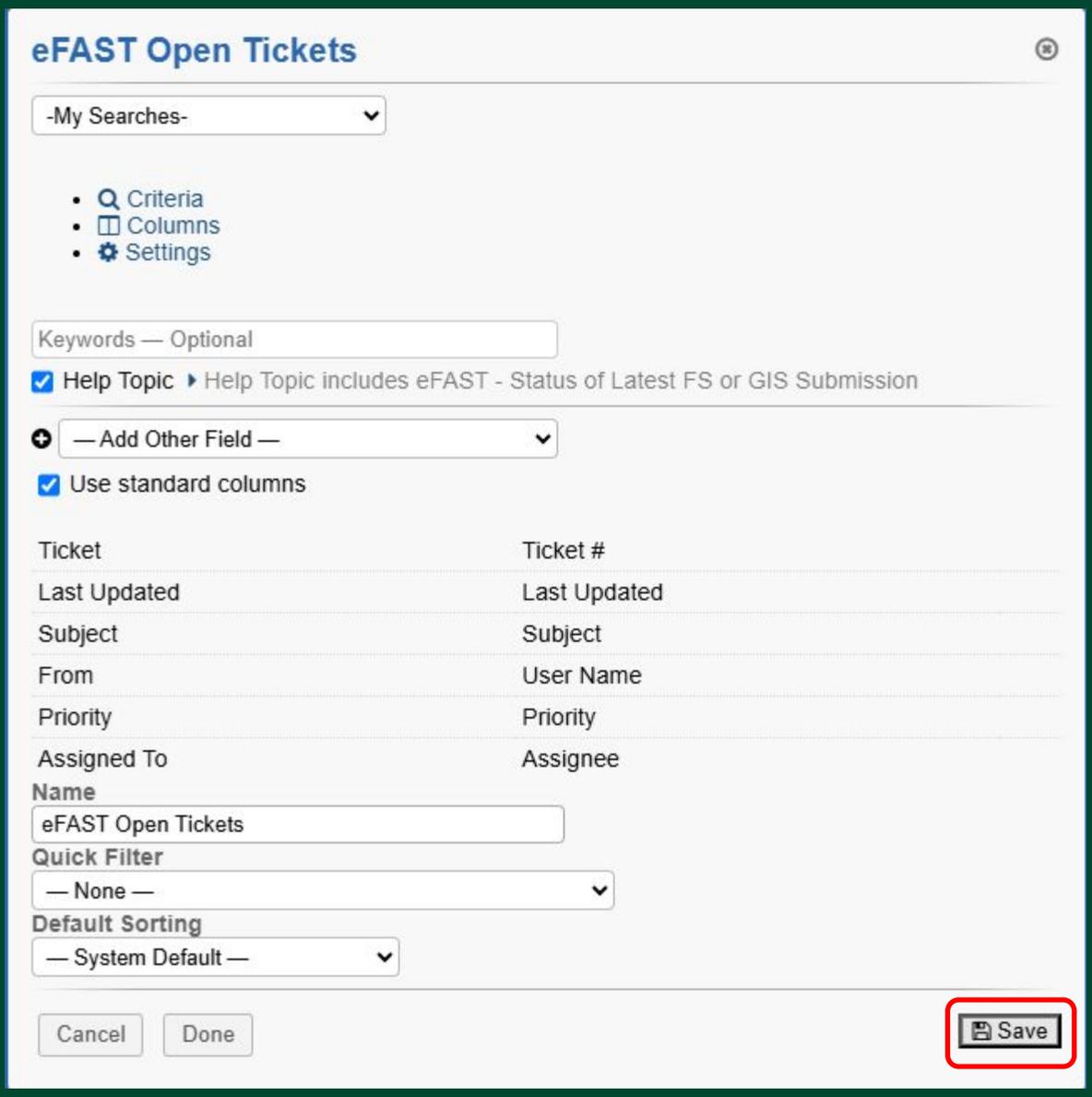
6. Click **Save** button to finalize



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15. Ticket Aging

The tickets in iMessage are classified according to their nature and complexity, in accordance with the SEC Citizen's Charter.

15.1 Service Level Agreement (SLA)

- Simple (3 days)
- Complex (7 days)
- Highly Technical (20 days)

15.2 Operation Schedule

- Monday to Friday, 08:00 AM to 05:00 PM
- Excluding holidays

15.3 Service Time

TICKET STATUS	SERVICE TIMER
Open	Started
For Compliance, For Payment, For Endorsement to Other Government Agencies, Resolved	Paused
For Processing, For Approval	Counting Resumes
Closed	Stopped

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16. Frequently Asked Questions (FAQs)

QUESTION	ANSWER
How do I view my assigned tickets?	Clicking the **My Tickets** menu displays all tickets currently assigned to you.
Why am I unable to view or open a ticket, and receives an **Access Denied** message?	The **Access Denied** message means that you do not have permission to view or access the ticket. This may occur if the ticket is assigned to another agent, or falls outside your access scope.
Why can't I download the file attached to a ticket?	Steps to download a file: 1. Right click on the attachment, and select open new tab 2. In the eSECURE log in page, enter **secphi** in the username field, and **Qwerty@123** for the password 3. Go back to the iMessage tab and download the file
Why does the ticket that was already transferred still appears in my ticket list?	A ticket still appears in your list because it has not been fully released from your ownership. When an agent replies to a ticket before it is transferred, that agent is automatically set as the current owner.
How do I release the transferred ticket	Steps to follow: 1. View the ticket details 2. Click More (gear icon button) at the top of the ticket page 3. Select **Release (unassign) Ticket** 4. Click **Release** button

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16. Frequently Asked Questions (FAQs)

QUESTION	ANSWER
Why are the tickets recently transferred to our division already marked as overdue?	Tickets appear as overdue upon transfer because its original due date or SLA timeframe continues from when it was created. Transferring a ticket does not reset or restart the service time.