



Raising Support Cases

***Getting started with
My Support Service***

March 09

About this user guide

- ◆ This document is for use by staff who are responsible for the logging of support cases.

User guide icons

Throughout this User Guide, icons may have been used where necessary, to draw attention to important information and to help with the process in general.



Note: A note supplements important points of the main text.



Tip: A tip suggests alternative methods that may not be obvious and helps you understand the benefits and capabilities of the product.



Warning: A warning advises you that failure to take (or avoid) a specified action could have undesirable consequences.

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1. Introducing the Talis My Support Service application

The Talis My Support Service helps manage the complete lifecycle service, from logging cases to suggesting and delivering solutions, including Web self-service and live agent support. The benefits to you of this new application are:

- ◆ A truly customer-centred process
- ◆ A streamlined, fully integrated communications process
- ◆ Greater transparency in the way calls are being handled

There are two ways in which cases may be logged within the application:

- a) through the Talis My Support Service or
- b) through a feature known as Email to case

2. Logging cases using the Talis My Support Service

2.1 About the Talis My Support Service

The purpose of this section is to introduce you to the new Talis My Support service.

- ◆ The Talis My Support Service is a web-based application.
- ◆ The Talis My Support Service is the self-service function of the new Customer Relationship Management application which replaces Talis Solutions
- ◆ The Talis My Support Service will allow you to create, view and update cases you have logged with Talis Support
- ◆ The Talis My Support Service will also allow you to search for a known solution for your issue

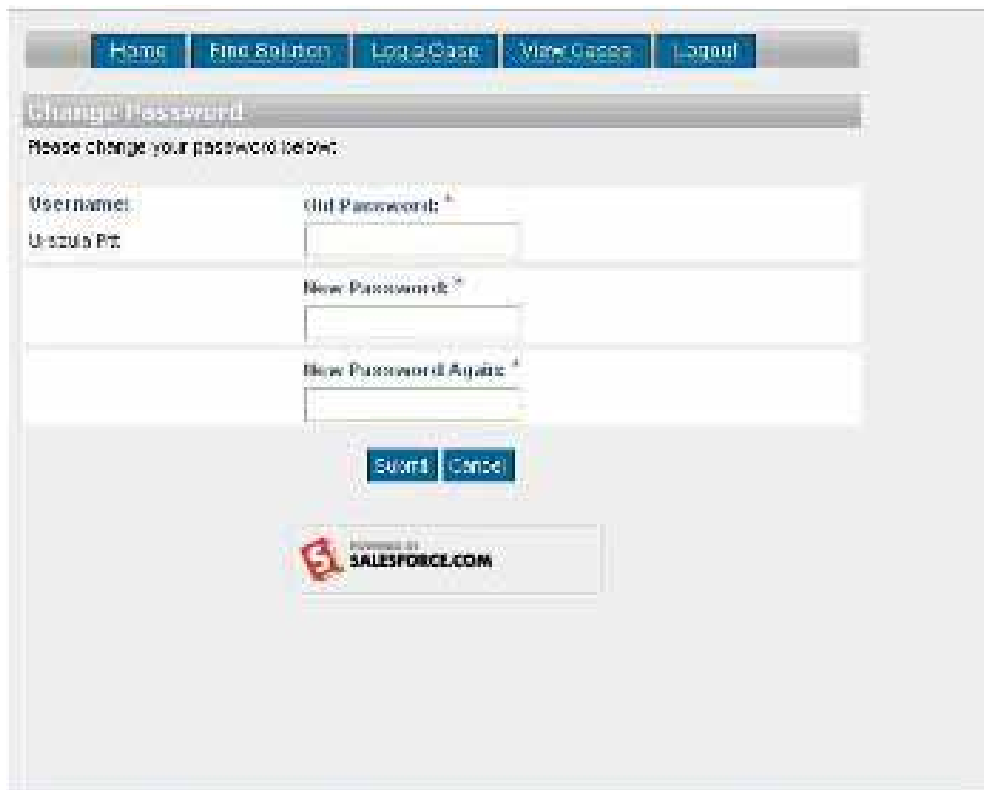
2.2 Logging in to the Talis My Support Service

To access the portal, you will need to register. Once you have registered, you will receive an email with a link to the portal's URL and detailing your user name and password.

On receipt of the email, click on the link which will take you to the portal's log-in screen

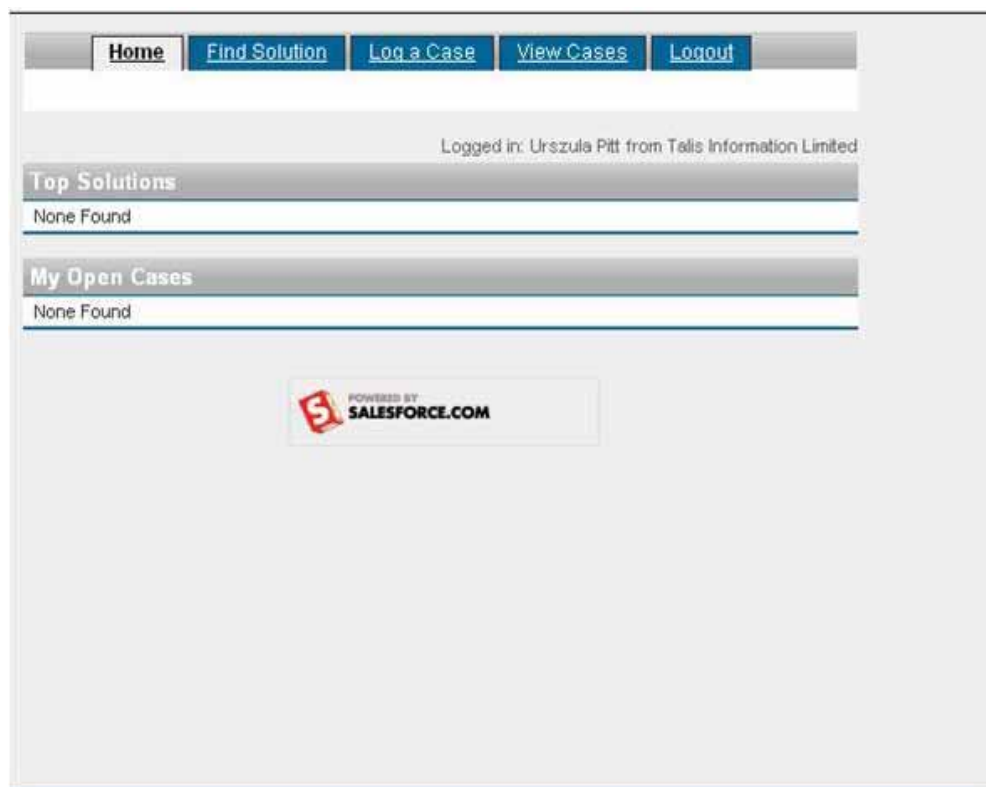


2.2.2 Enter your user name and password and click on the **Login** button. This will take you to the portal's Change Password page



The screenshot shows a web interface for changing a password. At the top, there is a navigation bar with buttons for 'Home', 'Find Solution', 'Log a Case', 'View Cases', and 'Logout'. Below this is a header section titled 'Change Password' with the instruction 'Please change your password below:'. The form contains four input fields: 'Username:' (with a tooltip 'Uppercase Pk'), 'Old Password:' (with a tooltip '*'), 'New Password:' (with a tooltip '*'), and 'New Password Again:' (with a tooltip '*'). Below the input fields are two buttons: 'Submit' and 'Cancel'. At the bottom of the form is a logo for 'SALESFORCE.COM'.

2.2.3 Complete the required fields and click on the **Submit** button. If you make a mistake, you are able to stop the process by clicking on the **Cancel** button and beginning the process again. Once you have successfully changed your password, you will be taken directly to the portal's Home page



2.2.4 From this screen, you will see that you have 4 options:

- [Find Solution](#)
This function will allow you to search the database for a known solution to your issue, using key words. This function is currently non-functioning as there are no solutions stored at present. This will develop over time as the application continues to be used
- [Log a Case](#)
This function allows you to log a new Support case
- [View Cases](#)
This function will allow you to view all cases you have already logged – either through the portal or by email/phone.
- [Logout](#)
As stated, this function will enable you to logout from the portal

2.3 Logging a new support case through the Talis My Support Service

To raise a new case through the portal, log in to the application and click on the [Log a Case](#) button. This will take you to the Log a case screen.

The screenshot shows a web interface for logging a case. At the top, there is a navigation bar with buttons for Home, Find Solution, Log a Case, View Cases, and Logout. Below this is a form titled "Log a Case". The form contains the following fields:

- Contact Name:** Sue Bennett
- Status:** New (dropdown menu)
- Product:** --None-- (dropdown menu)
- Version:** --None-- (dropdown menu)
- Product Area:** --None-- (dropdown menu)
- Subject:** * (text input field)
- Description:** (large text area)
- Examples:** (large text area)
- Priority:** Medium Impact (dropdown menu)

At the bottom of the form, there are "Submit" and "Cancel" buttons. Below the form is a logo for "POWERED BY SALESFORCE.COM".

Your name will appear by default and the Status of the case will default to **New**

The screenshot shows the 'Log a Case' form with the following fields and options:

- Contact Name:** Sue Bennett
- Status:** New
- Product:** A dropdown menu is open, displaying a list of products: --None--, Talis Alto, Talis Assure, Talis Base, Talis Bridge, Talis Decisions, Talis Engage, Talis Gateway, Talis Income Manager, Talis Keystone, Talis List, Talis Message, Talis Mobile, Talis Prism, Talis Source, Post Code Address File, and Sybase.
- Examples:** A large empty text area.
- Priority:** Medium Impact

Navigation buttons at the top: Home, Find Solution, Log a Case, View Cases, Logout.

Buttons at the bottom: Submit, Cancel.

Logo at the bottom: POWERED BY SALESFORCE.COM

2.3.1 Click onto the dropdown in the **Product** field to view the product list and select the product against which you wish to raise the case

The screenshot shows the 'Log a Case' form with the following fields and values:

- Contact Name:** Urszula Pitt
- Status:** New
- Product:** Talis Alto
- Version:** A dropdown menu is open, showing options: --None--, --None--, Alto 4.3, Alto 4.2, Alto 4.1, Alto 3, and Alto 2.
- Description:** An empty text area.
- Examples:** An empty text area.
- Priority:** Medium Impact

Navigation buttons at the top: Home, Find Solution, Log a Case, View Cases, Logout.

Buttons at the bottom: Submit, Cancel.

Logo at the bottom right: SALESFORCE.COM

2.3.2 Depending on the product selected, you may also need to select the **Version** from the dropdown list

The screenshot shows the 'Log a Case' form with the following fields and values:

- Contact Name:** Urszula Pitt
- Status:** New
- Product:** Talis Alto
- Version:** Alto 4.3
- Product Area:** A dropdown menu is open, showing a list of categories including Acquisitions, Application Configuration, Authority Control, Cataloguing, Circulation, Connectivity, Database Admin, Data Error, EDI, Functionality, Indexes, Interloans, Operating System Admin, Other, Performance, Reports, Scripts, Searching, and Universes.
- Priority:** Medium Impact

Navigation buttons at the top: Home, Find Solution, Log a Case, View Cases, Logout.

Buttons at the bottom: Submit, Cancel.

Logo at the bottom right: POWERED BY SALESFORCE.COM

2.3.2 Depending on the product selected, you may also need to select the **Product Area** from the dropdown list

The screenshot shows a web interface for logging a case. At the top, there are navigation buttons: Home, Find Solution, Log a Case (highlighted), View Cases, and Logout. Below this is a header for the 'Log a Case' form. The form contains several sections:

- Contact Name:** Urszula Pitt
- Status:** New (dropdown menu)
- Product:** Talis Alto (dropdown menu)
- Version:** Alto 4.3 (dropdown menu)
- Product Area:** Circulation (dropdown menu)
- Subject:** TEST (text input field)
- Description:** TEST (text area)
- Examples:** TEST (text area)
- Priority:** Low Impact (dropdown menu with options: Low Impact, --None--, Major Impact, High Impact, Medium Impact, Low Impact)

At the bottom of the form, there are two buttons: Submit and Cancel. Below the buttons is a logo for 'POWERED BY SALESFORCE.COM'.

2.3.3 Complete the free text fields with the necessary information and allocate the cases's **Priority**, using the dropdown. When you are satisfied that you have added all the necessary information, click on the **Submit** button.

If you find that you have made an error, you are able to change any of the required fields, prior to submitting the case or, alternatively, you are able to cancel the case by clicking on the **Cancel** button.

Home Find Solution Log a Case **View Cases** Logout

Case 00001020

Case Number: 00001020	Date/Time Opened: 30/10/2008 16:18
Contact Phone: 0870 400 5057	Date/Time Closed:
Contact Email: urszula.pitt@talis.com	Status: In Progress
Subject: UMP TEST	Description: UMP TEST
Priority: Low Impact	Product: Talis Base
Version: 	Product Area: Cataloguing

Examples:
UMP TEST

Case Closure:
To close a case please add the phrase PORTAL CLOSURE to your case via the ADD COMMENT tab

View Suggested Solutions Add Comment Add Attachment

Solutions

None Found

Related Comments

Comment


31/10/2008 15:17 | Mark Summers
please work!!!!

31/10/2008 09:36 | Sue Bennett
Test for Sue

31/10/2008 09:22 | Mark Summers
this is a public ocmment without email to the customer

Related Attachments

None Found

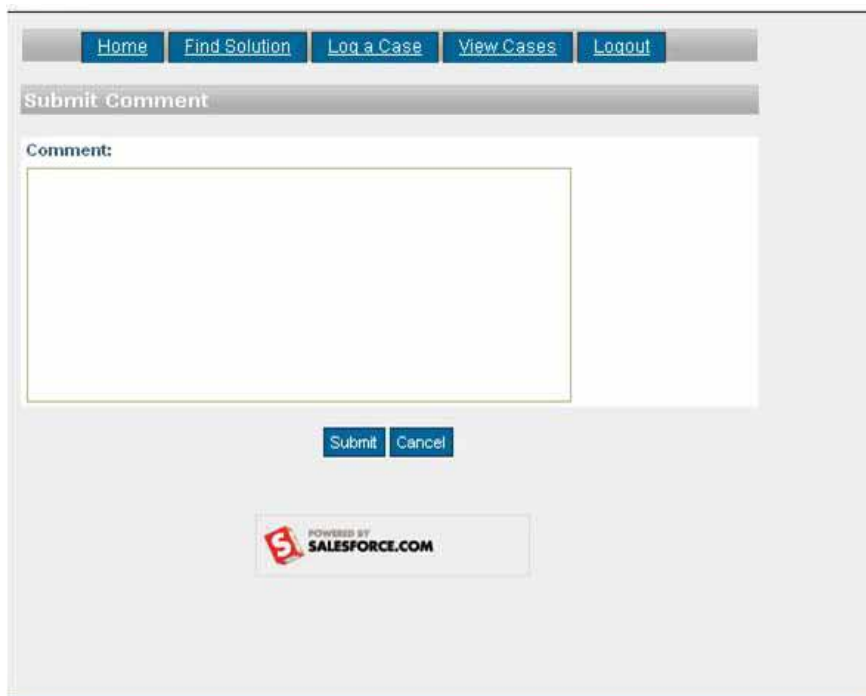

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SALESFORCE.COM

2.3.4 Clicking on the Submit button will take you automatically to the View Cases page. Here you will see the automatically assigned case number -

Case 00001020, the time and date that the case was opened and the details that you have added to the case. From this page, you are able to add comments or attachments such as screenshots or word documents.

2.4 Adding a comment

Should you wish to provide more detail to your case, such as additional information, you can do so by clicking on the **Add Comment** button. This will open the **Submit Comment** box



The screenshot shows a web interface for submitting a comment. At the top, there is a navigation bar with buttons for Home, Find Solution, Log a Case, View Cases, and Logout. Below this is a header for the 'Submit Comment' dialog. The main area contains a text input field labeled 'Comment:'. At the bottom of the dialog, there are two buttons: 'Submit' and 'Cancel'. At the very bottom of the page, there is a logo for 'POWERED BY SALESFORCE.COM'.

2.4.1 Complete the required text in the **Comment:** field and press the **Submit** button. If you do not wish to add the comment to the case, click on the **Cancel** button.

The screenshot displays a Salesforce case record for Case 00001021. At the top, there is a navigation bar with buttons for Home, Find Solution, Log a Case, View Cases, and Logout. The case details are organized into several sections:

- Case Information:** Case Number: 00001021, Date/Time Opened: 30/10/2008 16:40.
- Contact Information:** Contact Phone: 0870 400 5057, Date/Time Closed: (empty).
- Communication:** Contact Email: urszula.pitt@telis.com, Status: New.
- Case Details:** Subject: TEST, Description: TEST, Priority: Low Impact, Product: Talis Alto, Version: Alto 4.3, Product Area: Circulation, Examples: TEST.

Below the case details, there are two buttons: "Add Comment" and "Add Attachment".

The **Solutions** section shows "None Found".

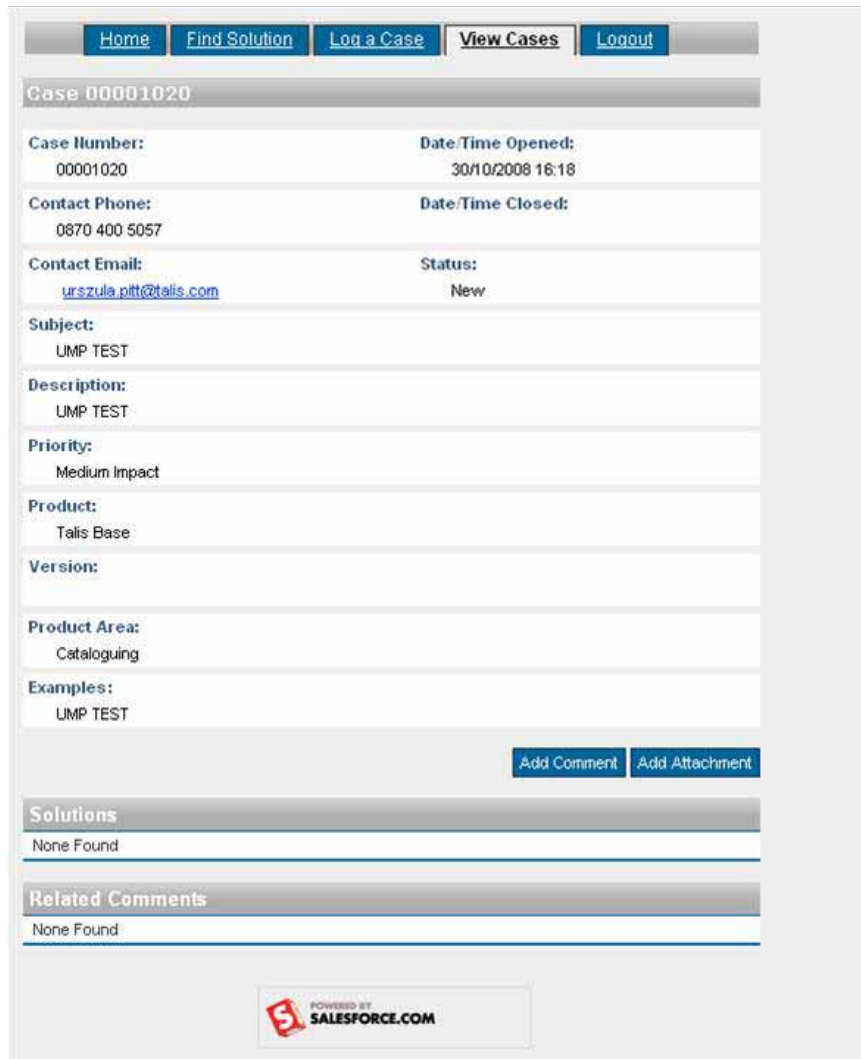
The **Related Comments** section shows a comment from Urszula Pitt on 30/10/2008 at 16:47, with the text "TEST COMMENT".

At the bottom, there is a logo for "POWERED BY SALESFORCE.COM".

2.4.2 This will take you back to the **View Cases** page where you will see your comment added to the **Related Comments** section.

2.5 Adding an attachment

Should you wish to provide more detail to your case, such as a screenshot or some documentation, you are able to do this by adding an attachment.



Home Find Solution Log a Case View Cases Logout

Case 00001020

Case Number:	00001020	Date/Time Opened:	30/10/2008 16:18
Contact Phone:	0870 400 5057	Date/Time Closed:	
Contact Email:	urszula.pitt@talis.com	Status:	New
Subject:	UMP TEST		
Description:	UMP TEST		
Priority:	Medium Impact		
Product:	Talis Base		
Version:			
Product Area:	Cataloguing		
Examples:	UMP TEST		

Add Comment Add Attachment

Solutions
None Found

Related Comments
None Found

POWERED BY SALESFORCE.COM

2.5.1 To add an attachment, click on the [Add Attachment](#) button which will take you to the **Attach File** screen.

Home Find Solution Log a Case View Cases Logout

Attach File

- 1. Select the File**
Type the path of the file or click the Browse button to find the file.
 Browse...
- 2. Click the "Attach File" button.**
Repeat steps 1 and 2 to attach multiple files.
(When the upload is complete the file information will appear below.)
Attach File
- 3. Click the Done button to return to the previous page.**
(This will cancel an in-progress upload.)
Done

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2.5.2 Click on the button in the **Select the File** field and select the file you wish to attach to the case. Once you have selected the appropriate file, it will appear in the **Select the File** field. Click on the button to attach the file to the case.

Home Find Solution Log a Case View Cases Logout

Attach File

- Select the File**
Type the path of the file or click the Browse button to find the file.
- Click the "Attach File" button.**
Repeat steps 1 and 2 to attach multiple files.
(When the upload is complete the file information will appear below.)
- Click the Done button to return to the previous page.**
(This will cancel an in-progress upload.)

You have just uploaded the following file:

File Name	Size
Baby Eddie aged 6.jpg	85KB

POWERED BY SALESFORCE.COM

2.5.3 Once the file has successfully uploaded, you will receive confirmation at the bottom of the screen. Click on the button to return to the screen. You can then log out of the portal by clicking on the button. This will take you to the Talis home page.

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Talis Group About location management contact

Talis Platform Semantic web application platform

Talis Applications Libraries, education, learning, community

Talis is a privately owned, well established and innovative software company.

The Talis Platform division is a global leader in the research and application of Semantic Web technologies. The Talis Applications division is the UK market leader in providing academic and public library solutions.

We are among the world's first companies to apply leading edge Semantic Web technologies. We are transforming our existing applications, creating new applications and providing a technology platform for others.

Careers Management team

The Talis Platform makes it easy for developers to build powerful applications that use Semantic Web technologies and standards.

Delivered as Software as a Service (SaaS), the Platform dramatically reduces the complexity and cost of storing, indexing, searching and augmenting large quantities of data. It provides a reliable and safe environment to support a vast range of information rich applications.

We are using the Platform today to create our own next generation solutions and we invite software developers to build their own applications using the Platform services.

Podcasts Nodalities blog

Through decades of close customer partnership we have developed outstanding solutions for academic institutions and public libraries.

From acquisitions, cataloguing and circulation to powerful search tools for students and citizens, we combine leading edge technology with inclusive agile development processes. As a result we have a deep and long earned understanding of our customer's needs.

Podcasts FanBus blog Forums

The Library 2.0 Gang hosted by Richard Walls

Project Xplore Connecting Knowledge

The Semantic Web Gang hosted by Paul Miller

Nodalities THE MAGAZINE OF THE SEMANTIC WEB

Defrag 2008 November 3-4 Denver Colorado

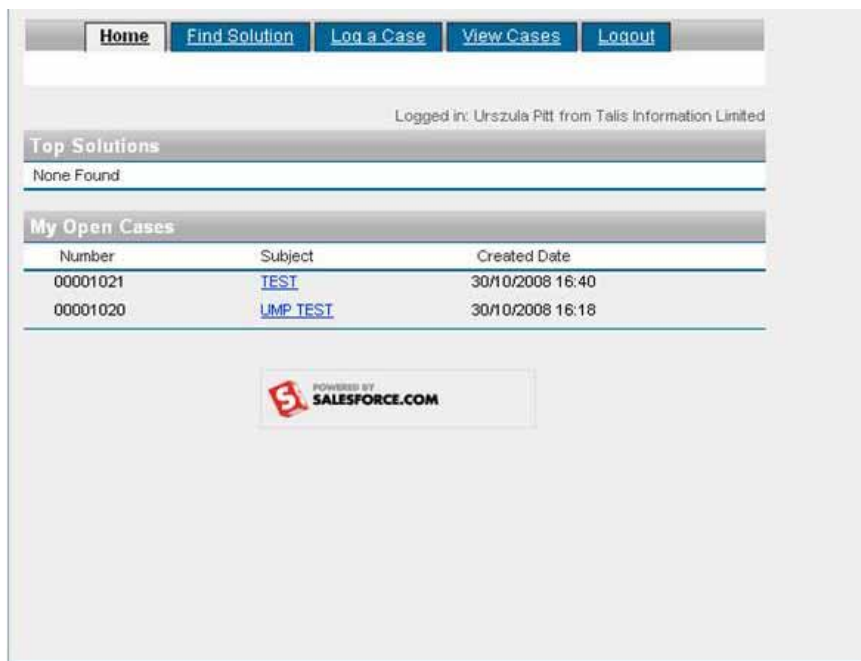
2.5.4 Once a case is logged through the portal, you will receive an automatically generated email, detailing the case number and confirming that the case has been logged.



2.6 Viewing an existing case

Once you have logged a case, you are able to view the case, add additional information, view any progress made on it and, where applicable, close the case.

1.6.1 Log into the portal. This will take you to the home page, which lists the cases you have logged.



1.6.2 Select the case you wish to view by clicking the hyperlinked Subject field for that case.

[Home](#) | [Find Solution](#) | [Log a Case](#) | **[View Cases](#)** | [Logout](#)

Case UUUU1U2U

Case Number: nnnn1n2n	Date/Time Opened: 30/10/2008 16:18
Contact Phone: 0870 400 5057	Date/Time Closed:
Contact Email: urszula.pitt@talix.com	Status: In Progress
Subject: UMF TES	Description: UMF TEST
Priority: Low Impact	Product: Talis Base
Version:	Product Area: Cataloguing

Examples:
UMF TES

Case Closure:
To close a case please add the phrase PORTAL CLOSURE to your case via the ADD COMMENT tab

[View Suggested Solutions](#) | [Add Comment](#) | [Add Attachment](#)

Solutions

None Found

Related Comments

Comment
31/10/2008 15:17 Mark Summers please work!!!!
31/10/2008 09:36 Sue Bennett Test for Sue
31/10/2008 09:22 Mark Summers this is a public ocmnent without email to the customer

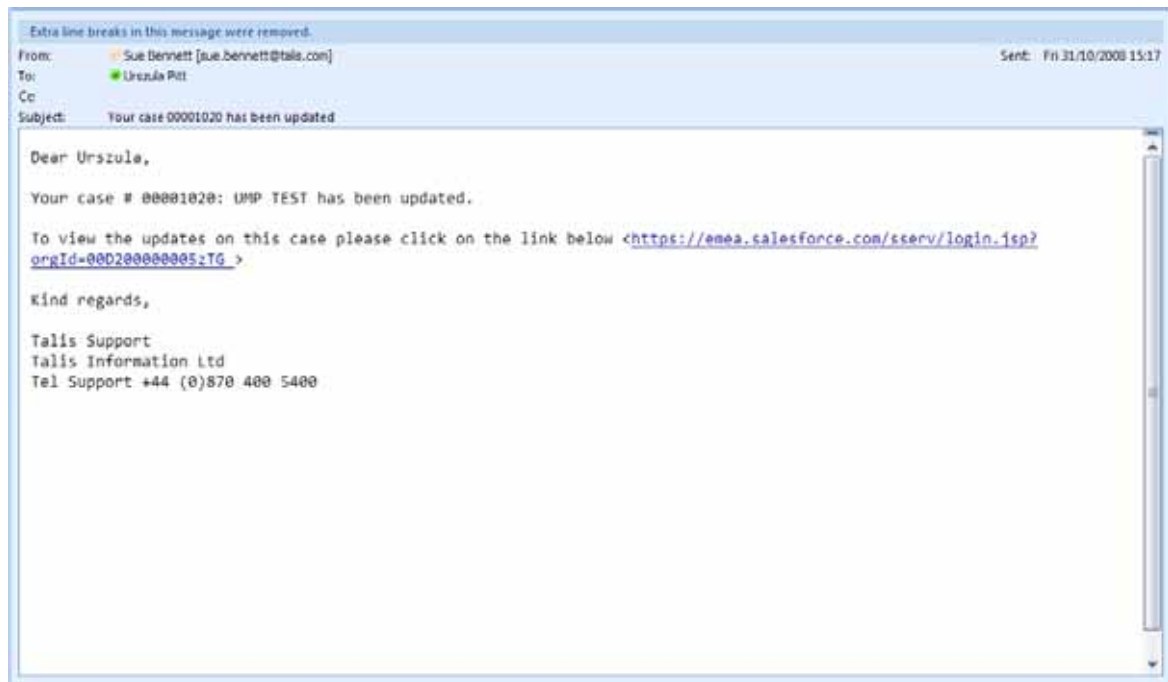
Related Attachments

None Found



1.6.3 The **View Cases** page opens and from here, you will be able to add additional comments, attachments and view updates made to the case.

When your case is updated by Talis Support, you will automatically receive an update email.



[Home](#) | [Find Solution](#) | [Log a Case](#) | [View Cases](#) | [Logout](#)

Case 00001020

Case Number: 00001020	Date/Time Opened: 30/10/2008 16:18
Contact Phone: 0870 400 5057	Date/Time Closed:
Contact Email: urszula.pitt@talys.com	Status: In Progress
Subject: UMP TEST	Description: UMP TEST
Priority: Low Impact	Product: Talis Base
Version:	Product Area: Cataloguing

Examples:
UMP TEST

Case Closure:
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Related Comments

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this is a public ocmment without email to the customer

Related Attachments

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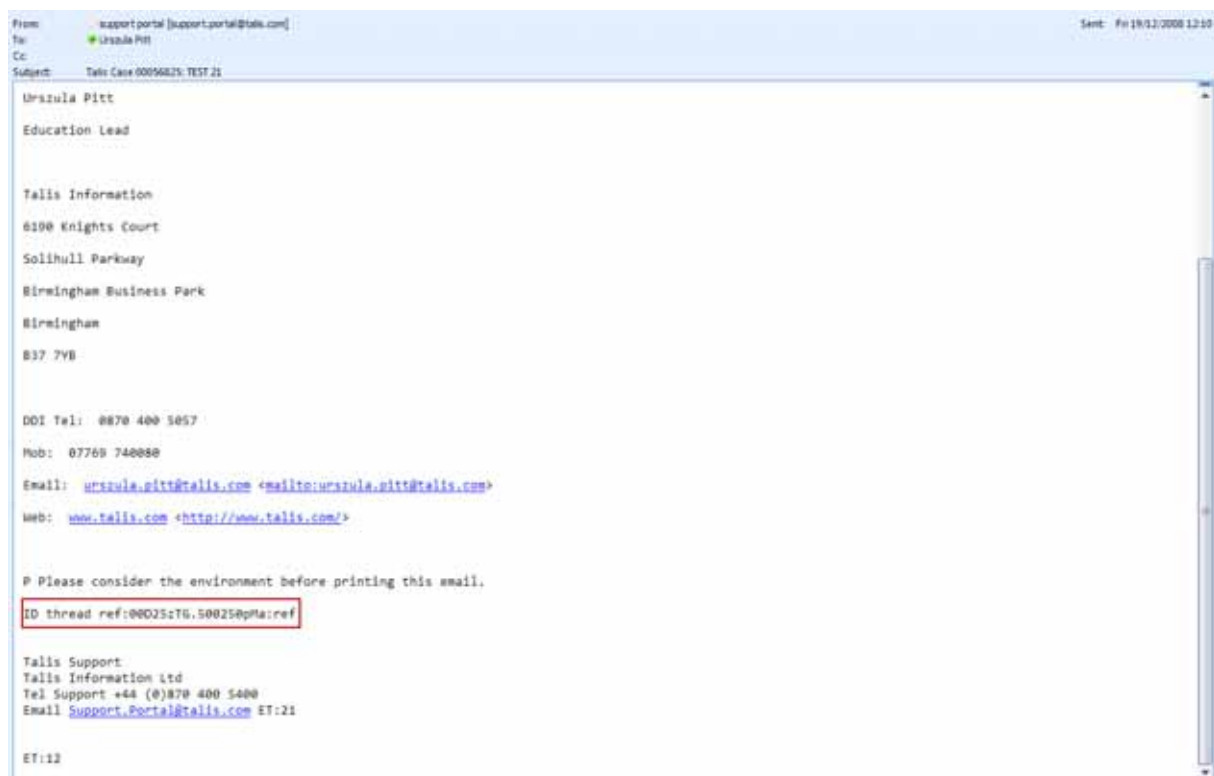


2.6.4 To close a case, you will need to click on the [Add Comment](#) button and add the phrase PORTAL CLOSURE to the comments box and click on the [Submit](#) button. This will automatically close your case and notify Talis Support accordingly

3. Logging a case using Email to case

You may wish to log a case in the Talis My Support Service simply by sending an email. To do this, you can send an email to support.portal@talis.com, giving full details of your issue, including any screenshot(s) or other supporting documentation as attachments.

This action will log the case within the Talis My Support Service, including the attachment(s). You will receive an email in acknowledgement of your case, detailing the case number allocated to it and a unique case thread ID.



Should you then wish to update this case, please use the reply function as this will ensure that your update will be linked to your case. If you do not receive or lose the acknowledging email, you can use the Talis My Support Service to update the case.

We trust that this guide is helpful and provides you with the necessary information that you would need to use the Talis My Support Service, but if you find any errors or information that you feel is missing, please let us know by emailing education@talis.com.