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.

Contents

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
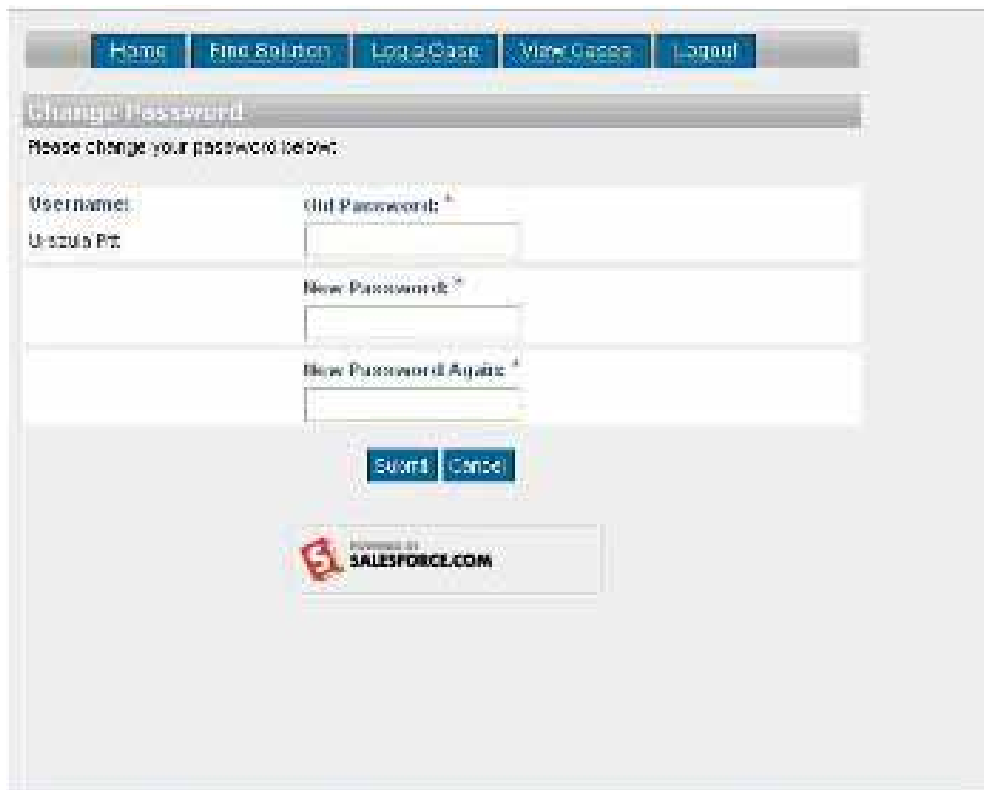
2.2 Logging in to the Talis My Support Service

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

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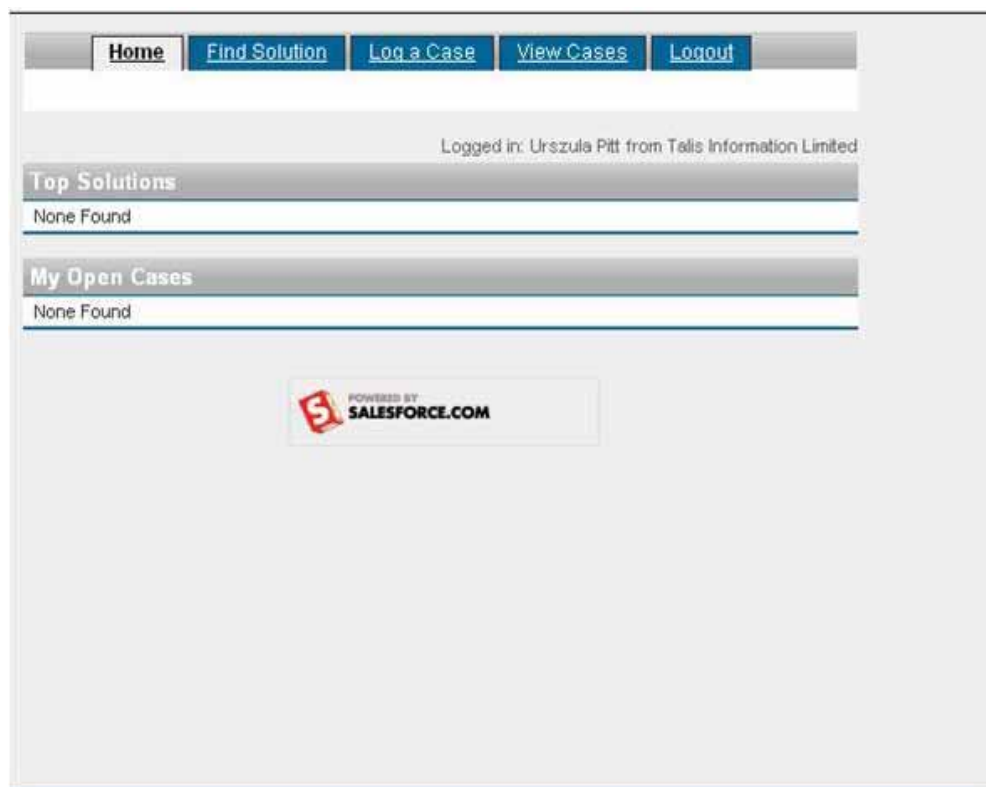
2.2.4 From this screen, you will see that you have 4 options:

- **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.

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

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

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

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

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.

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

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.

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.

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

2.5.2 Click on the [Browse...] 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 Attach File button to attach the file to the case.

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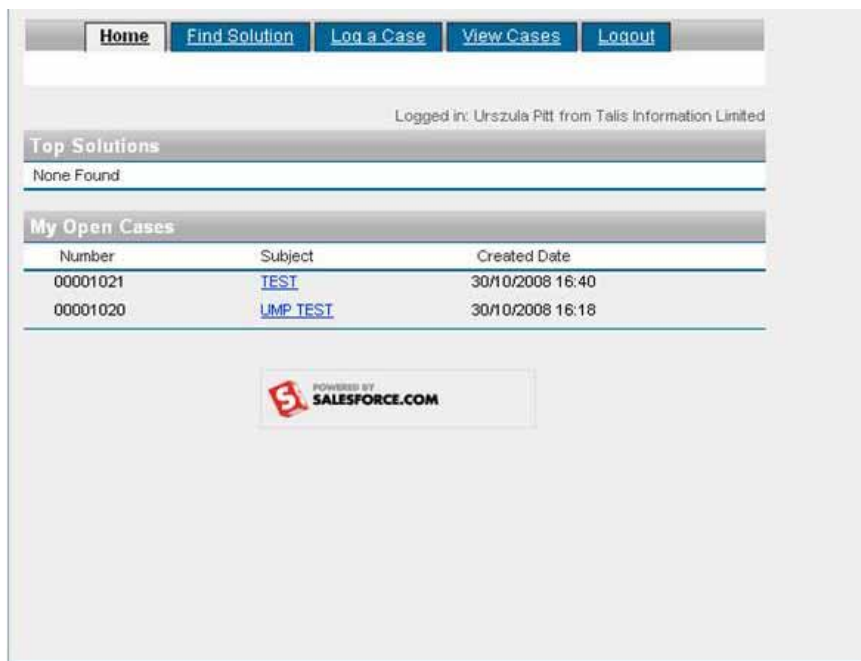
2.5.4 Once a case is logged through the portal, you will receive and automatically generated email, detailing the case number and confirming that the case has been logged.

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.
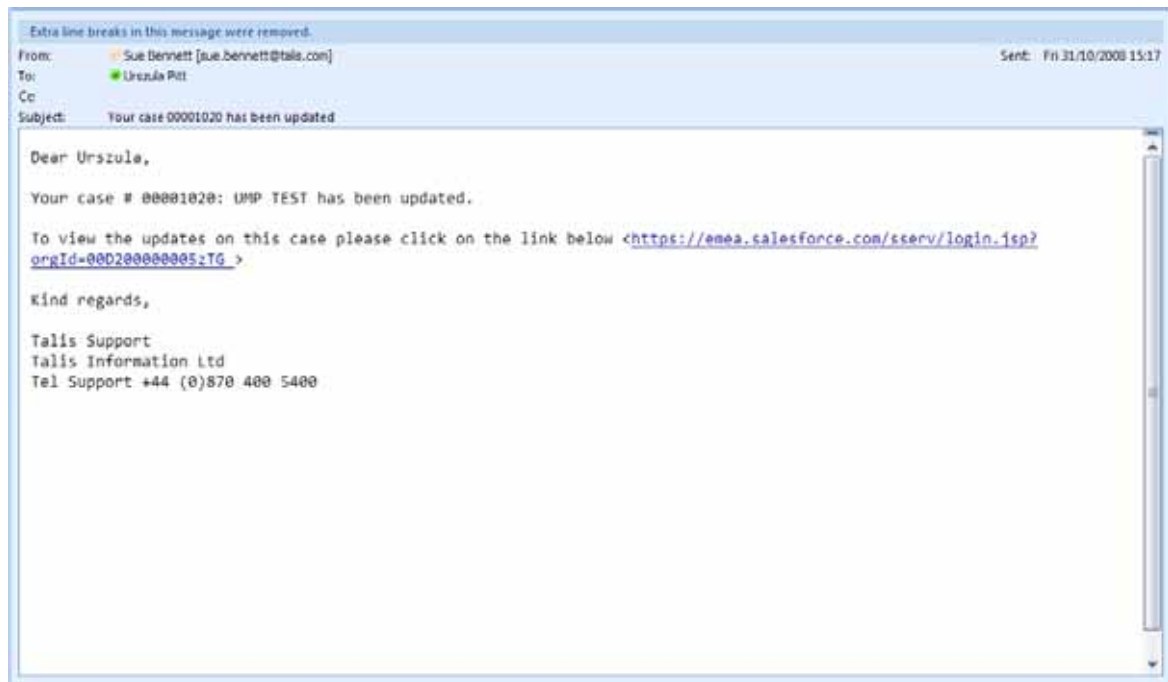

1.6.3 The **View Cases** page opens and from here, you will be able to add additional comments, attachments and view updates made to the case.

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

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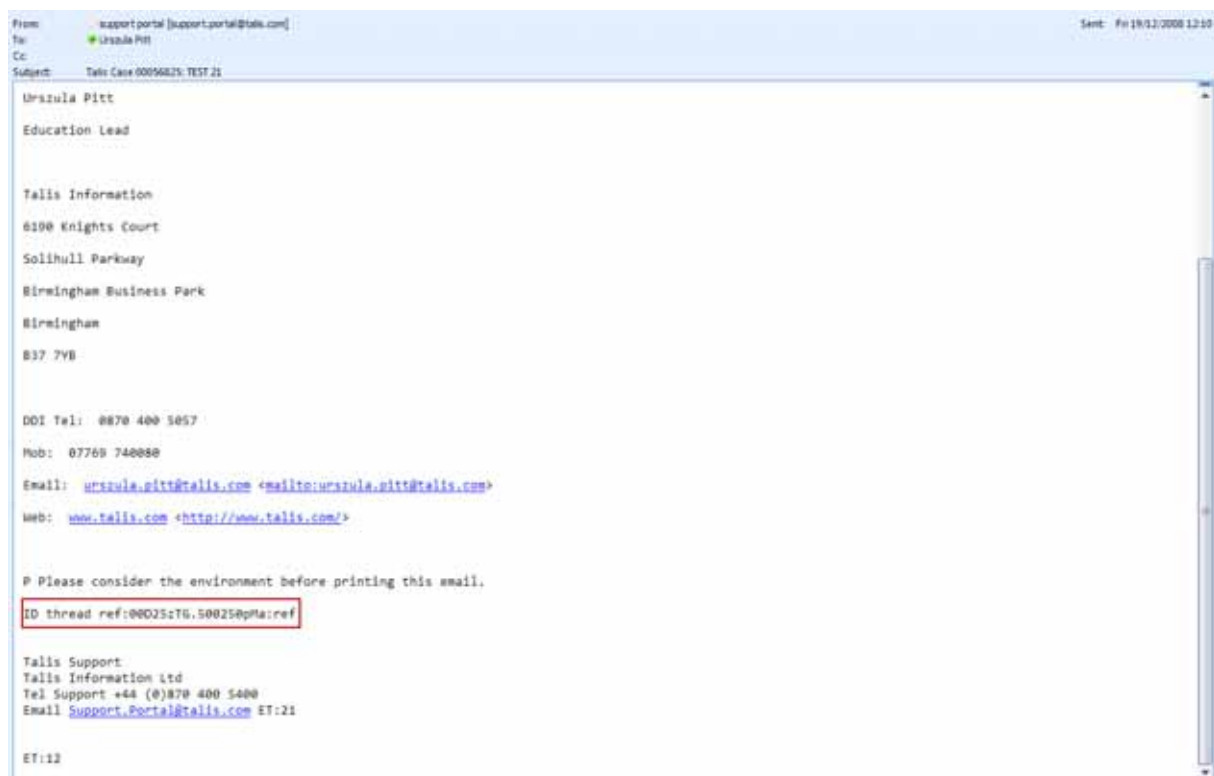
Should you then wish to update this case, please use the reply function as this will ensure that your update will be linked to your case. If you do not receive or lose the acknowledging email, you can use the Talis My Support Service to update the case.

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.