Customer Portal User Guide

November, 2015
Copyright Information

The software product described in this publication is contracted through ABB and is licensed to authorized users under a written license agreement with ABB. The information in this publication is confidential and proprietary to ABB. No part of this software product or associated documentation may be copied, reproduced, transmitted, or distributed by any third party in any form, without the prior written consent of ABB. This publication is subject to change without notice. ABB assumes no responsibility for any errors that may appear in this document.

This publication is intended to provide information regarding the software product. It is provided with the understanding that ABB is not engaged in rendering legal, accounting, or other professional services through the production of this publication. Further, ABB makes no claims that use of this software in accordance with this publication will ensure compliance with any federal or state laws, rules or regulations. ABB recommends that the customer seek professional advice in order to determine that its policies and practices are in compliance with applicable laws, rules, or regulations.

Because of the nature of this publication, numerous hardware and software products are mentioned by name. In most, if not all, cases these product names are claimed as trademarks by the companies that manufacture the products. It is not our intent to claim these names or trademarks as our own.

Copyright © 2010
ABB
All Rights Reserved

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Product and Version</td>
<td>Customer Portal 05</td>
</tr>
<tr>
<td>Publication Date</td>
<td>November 2014</td>
</tr>
</tbody>
</table>
# Table of Contents

## Chapter 1: Overview
- Overview .................................................. 1
  - Logging In/Out of Customer Portal ........................................ 1
  - Home Page Overview ........................................ 3

## Chapter 2: Cases
- Creating a Case ........................................ 7
  - Additional Case information ........................................ 8
  - Support Survey ........................................ 9
- Viewing an Existing Case ........................................ 11
- Closing a Case ........................................ 12

## Chapter 3: Change Requests
- Viewing a Change Request ........................................ 13

## Chapter 4: Knowledge
- Searching and Viewing Knowledge ........................................ 15
  - Searching TSB Articles ........................................ 16

## Chapter 5: Reports and Dashboards
- Viewing and Running Reports ........................................ 17
- Viewing Dashboards ........................................ 18

## Chapter 6: Workspace, Content and Subscriptions
- Workspaces ........................................ 20
  - Viewing a Workspace ........................................ 20
  - Subscribing to a Workspace ........................................ 21
- Content ........................................ 22
- Subscriptions ........................................ 23
Chapter 1: Overview

Overview
Welcome to the Customer Portal User Guide. This document is a functional reference on how to use the Customer Portal. Features available on the Customer Portal include

- Access 24 x 7 to electronic support
- Create initial Cases including emergency service issues
- Attach supporting documentation or files to Cases
- View real-time progress made on the case
- Update and close Cases
- View details on Cases reported by your organization
- Resolve issues or find workarounds through the use of Knowledge
- Submit customer satisfaction Surveys
- Review support and satisfaction metrics
- Review defect corrections (Change Requests)
- Download available product media
- Update personal information
- View dashboards

Logging In/Out of Customer Portal

- Open the Customer Portal in an internet browser by going to https://EnterpriseSoftware.force.com/customerportal/login
- Enter the username and password as provided via email.
If a password is not available, click **Forgot your password?** Enter the user name and click **Submit.** A new e-mail will be sent with a temporary password.

- Press **Login.**
- Logging into the Customer portal for the first time or with a newly generated password will require Customers to create a secured password. The following Change Password prompt will display.

![Change My Password](image)

- Create a password that is at least 12 alphanumeric characters.
- Passwords that are considered acceptable will prompt the password strength progress to change to **Acceptable.**
- **Verify** the password.
- Press **Save.**
- The **Customer Portal Home Page** is displayed.

![Customer Portal Home Page](image)

- To log out of the Customer portal, simply click your name and then **Logout** at the top of the page.
Home Page Overview

Alerts, Set-up and Searches

The main section and left side of the page are used for Alerts, Set-up and Searches.

Main Page Section:
Displays important information regarding Company Announcements and upcoming events such as scheduled maintenance and much more.

Personal Set-up:
Personal Set-up is used to update personal settings such as phone and password.

Search:
Search section is used to search for Cases and Change Requests. An Advanced Search is also available to allow customers to limit the search to particular areas of the Cases and/or Change Requests.

Recent Items:
Displays the last 10 items viewed on the Customer Portal.

Customer Portal Links:
Provides links to other ABB Company websites.

Available Tabs Overview

Cases:
Allows the Customer to View, Create and Close Cases for their Company based on security levels defined within SalesForce.

- A Customer Portal user can be limited to see only their cases or all the cases for the company.
- A Customer Portal user may be granted the ability to close cases.
- A Customer Portal user may be granted the ability to download software and corrections. Customers given this security will see a workspace and content tab on their view.

Change Requests:
A Change Request allows the customer to view all published Change Requests for the products under maintenance.

Published Change Requests include:

- Any Case which has been sent to development for a correction by a customer. Customers are able to see each other’s issues but the name of the customer who reported this is not published.
- Change Requests which have been found internally and have Emergency Patch implications. For example, if a financial impact issue was found internally with the system, customers would be able to review the Change Request.
Knowledge:
A knowledge article is a published detailed description of a customer(s) issue and the resolution of that issue. Customers are encouraged to search the knowledge base for answers prior to generating a case.

Reports:
Several standard reports have been developed for the Customers which can be generated and exported to get real-time information.

Dashboards:
Standard dashboards have been developed for the Customers which can be used to track case status.

Workspaces:
Provides a list of all product download workspaces to which a Customer is associated. A Workspace product download folder houses Content related to product workspace.

Content:
Lists all the available media (e.g. Emergency Patches and Patch Releases) a Customer can download based on workspace security and contractual entitlement.

Subscriptions:
Provides a list of Workspaces and Contents to which a Customer has subscribed.
- When a Customer subscribes to a Workspace, they will get automatic notifications from the customer portal when new Content is added to the workspace.
- When a Customer subscribes to content, they will get automatic notification from the customer portal if that content is altered.

**Personal Set-up**
To update personal settings, select the **My Profile** link provided on the Home Page.

**Edit Personal Information**
To edit personal information such as address, phone number and time zone, press the **Edit** button at the top of page.
Update any applicable information. When finished, press **Save**.
Change Password

To change a password, press the **Change My Password** button at the top of the page.

Enter the old and new password. When finished, press **Save**.

**Note:** Users will automatically be prompted by the portal to reset the password once a year.
Creating a Case

Select the Cases Tab.

Press the Create New Case button.

The Case Edit page is displayed.

Fill in the details of the case. Required fields are noted with a red bar. Fields that are read-only will be used by the support team to further manage and process the case.

Select the appropriate Asset by utilizing the Search list.
Select the appropriate **Purchased Product Level 1** by utilizing the Search list.

![Purchased Product Level 1 ID](image)

Select the appropriate **Priority** and **Customer Ranking** by utilizing the Drop Down list.

![Priority and Customer Ranking](image)

Select the appropriate **Type** by utilizing the drop down list.

![Type](image)

Select the appropriate **Type of Environment** by utilizing the drop down list.

![Type of Environment](image)

Enter the appropriate **Subject**, **Description** and **Steps to Recreate**.

![Enter Information](image)

Click **Save** when finished. The case will be automatically submitted and routed to the appropriate queue for assignment.

![Save](image)

**Note:** Once a Case is submitted, the header information can no longer be changed. **Comments** and **Attachments** may be added after submitting.

---

### Additional Case information

**Case Comments**

Press **Add Comment** to add a comment related to the case. Comments added to the case will send an e-mail message to the support personnel.
Attachments

Press **Add Attachment** to add an attachment to the case. Attachments added to the case will send an e-mail to the support personnel.

Change Request Links

Any Change Requests created for the case will be visible in the Change Requests related list. To view the details of the Change Request, click on the Change Request ID.

- This list will only be visible on the Case if there is a Change Request associated.
- Customers can link directly from the case to the Change Request by clicking the Change Request CR-number.

Articles

Use the article list at the bottom of the page to search for Knowledge related to resolving the Case. Press the **Find Articles** button to have the application look for matching articles.

Support Survey

Use the Support Surveys to generate a survey at any time during the lifecycle of the case to capture how satisfied you are with the progression of your case.

- Surveys are divided into 2 separate areas: Satisfaction with this Case; GCC Overall Satisfaction.
• A score of 0 to 6 is unhappy, 7 to 8 is neutral and 9 to 10 is delighted with the service.
• Additional comments can also be added to further explain your score.
• Every Survey which is submitted is e-mailed to middle and upper management for review.
Viewing an Existing Case

Select the **Cases** tab.

The **Recent Cases** that have submitted are displayed.

There are multiple views available from the View Selector drop-down. Select a view by utilizing the drop down list.

- **My Open Cases**: All Cases the user has created that are currently in an Open status.
- **All Open Cases**: All Cases the Customer (regardless of user) has created that are currently in Open status
- **My Cases**: All Cases the user created that are in both Open and Closed statuses.
- **All Cases**: All Cases the Customer (regardless of user) has created that are in both Open and Closed statuses

**Note**: All Open Cases and All Cases view require special access.

Select the **Case Number** or **Subject** to view the details of the Case.
To return to the Case List select Back to List: Cases.

Closing a Case

Locate the applicable case. Press Close Case.

The Close Case page is displayed. Enter updated status and close reason. When finished, press Submit.
Chapter 3: Change Requests

Viewing a Change Request

Select the Change Requests tab.

Select a Change Request View and Press Go.

A list of Change Requests will be displayed

Select the Change Request ID to view the details of the Change Request. Any related Releases will also be displayed (if any) at the bottom of the page.
Change Requests carry two Change Request Numbers

The Change Request ID is the Change Request generated from SalesForce associated to the customer Case. The Change Request CQ ID is the cross-reference number associated to baseline development defect tracking system. Each field is searchable in the Customer Portal.
Chapter 4: Knowledge

Searching and Viewing Knowledge

A knowledge article is a published detailed description of a customer(s) issue and the resolution of that issue. Customers are encouraged to search the articles for answers prior to generating a case.

To search the knowledge database, select the Knowledge tab.

Change the filter options to narrow down the search. You can filter by Product and Article Type.

Enter keywords related to the case inquiry in the Search Knowledge box and press enter.

A list of articles matching the inquiry displays in order of relevancy. If no article matches are found, no articles are displayed.
Select the title of an article in order to view it.

If the article helps answer the question please rate it by click the number of stars you rate the article with.

If you want to see more details about an article then click the Show Properties button.

Tip: When viewing an article, users can press Printable View to see how an article would look when printed. To print the article from the printable view, press Print This Page.

Searching TSB Articles

Technical Support Bulletins (TSB) can be viewed through Knowledge. To locate these articles filter on Article Type of TSB.
Chapter 5: Reports and Dashboards

Viewing and Running Reports

Customers have access to several standard reports on the portal. To view the reports select the Reports tab.

Recently viewed reports will display.

Search for a specific report by entering key words in the Find Reports and Dashboards area.

Note: Users will only be able to view data in the report that the Customer has access to.

There are 3 report Folders

- Customer Service Reports – Displays all the reports associated to Customer Service
- Customer Specific Reports – Displays customer specific reports.
- Customer Service Dashboards – Displays all the dashboards associated to Customer Service.

To execute the report select the Report Title.
The Report results are displayed. Several options are available:

- **Run Report**: Refresh the report.
- **Hide Details**: Summary level report.
- **Printable View**: Formatted printable report.
- **Export Details**: Export of the report in Excel format.

### Viewing Dashboards

Customers have access to several standard dashboards on the portal. To view the dashboards select the **Dashboard** tab.

The last dashboard you viewed will display.
Change dashboards by choosing the desired one from the dropdown.

Note: By clicking on the pie chart you can get to the report and data that makes up that chart.
Workspaces

Workspaces (and Content) is only required for users apply patches to your system. Therefore not all Customer Portal licenses have the ability to view/download corrections from the customer portal. You will want to select a few individuals from your company to be given this capability.

Viewing a Workspace

To view a list of all Product Download Workspaces select the Workspaces tab. A Workspace is a folder that houses Product Downloads (Content) related to a specific Product and/or Customer. When users select the Workspaces tab a list of all Workspaces the user has access to, in addition to Top Content and Recent Activity related to the Workspace (what was updated, etc.) will display.

Select the Workspace from a list of workspaces. Users only see those workspaces they are entitled too. To page through workspaces use the Next/Previous buttons at the bottom on the page.

To view the contents of a Workspace, click on the Workspace Name. The details of the Workspace will display.
**Note:** The subscription option at the top of the page. See Subscribing to a Workspace.

To view a particular piece of Content, select the Title of the Content. The Content Detail page will be displayed. To download the Content, click the **Download** button.

**Subscribing to a Workspace**

If a user subscribes to a Workspace, an automatic e-mail notifications from the customer portal notifying them when new Content is added. By default users are automatically subscribed to workspaces when their name is associated to the workspace. It is highly recommended that users do not remove themselves from the workspace.
Content

Users may also download Content by clicking on the Content tab. From here users can conduct a general search for Content or select a Workspace to search for Content.

Once Content is located users may select the Content by clicking on the checkbox next to its name and select Download.

Tip: Users can select several pieces of Content to download at once.
Subscriptions

Provides a list of Workspaces and Contents which a Customer has subscribed to.

From the Subscription page you can also unsubscribe from an object by clicking on the subscription indicator.