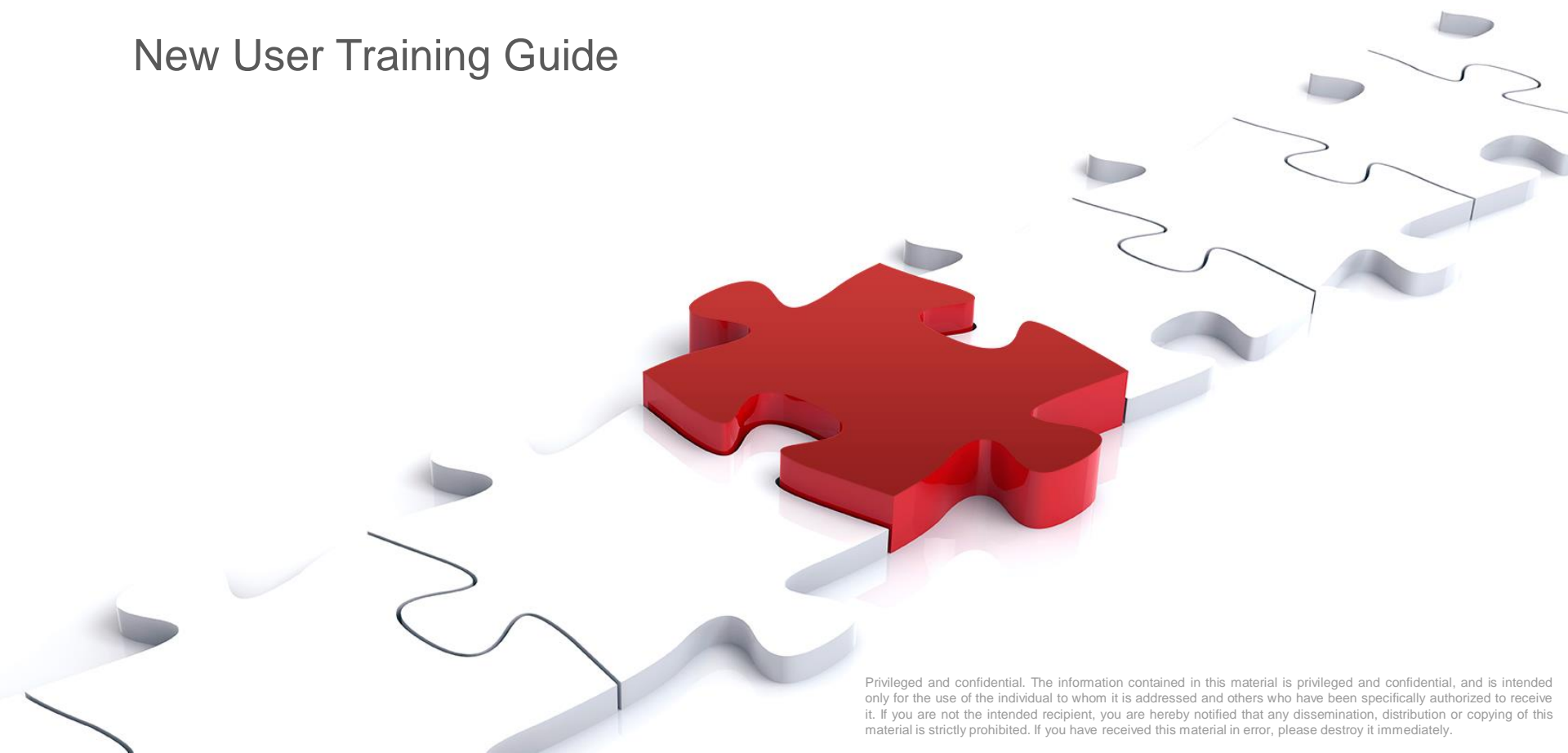




TEOCO Customer Support Portal

New User Training Guide



Welcome

- **TEOCO Customer Support Portal**
 - TEOCO Customer Support Portal is the primary way for users to submit support requests for TEOCO's products and services.
 - The following slides will walk you through TEOCO's Customer Support Portal to assist you in getting started working with our support team.

Using the Customer Support Portal

- What follows is a step-by-step guide to:
 - Registering your account
 - Logging in
 - Navigating the home page
 - Submitting a new support request
 - Viewing prior support requests
 - Updating an existing support request

Registering your account

- Prior to logging into the Customer Support Portal for the first time, we ask that you enroll in TEOCO's Password Management System.
- Enrolling in password management allows you to manage your own password to the support portal. This will make it easier and faster for you to reset your password due to expiration or inactivity.
- The password management system will send notifications to you when your password is set to expire to allow you to proactively reset your password and maintain easy access to the Portal.

Registering your account

The TEOCO Password Management Tool can be accessed at:

<https://pwreset.teocosolutions.com>

Registering your account



Click the Enroll Now link to enroll in the system

TEOCO Password Management System



THE EMPLOYEE OWNED COMPANY

Welcome to the TEOCO Corporation password management system. This system allows you to change your password and unlock your account, even if you have forgotten your password.

- **Enroll**
You must enroll into this system before you can use it to reset your password or unlock your account. Enrollment is a one-time process and takes only a few minutes.
[Enroll now](#)
- **Reset**
Select this option if you have forgotten your password and would like to reset it.
[Reset password](#)
- **Unlock**
Your account may become locked if the wrong password is entered too many times during logon. Select this option to unlock your account. [Unlock account](#)
- **Change**
Select this option if you know your current password and would like to change it.
[Change password](#)

Registering your account

Enter the user name and initial password you received as part of your enrollment. Omit the 'USHS\'', as that is specified in the Domain field, (e.g. If user name is 'USHS\doed', enter 'doed').

Choose and answer your security questions

Enroll

Enter your User name, Domain and Password to confirm your identity. You cannot enroll if you have forgotten your password, or if your account is locked.

Use the question and answer fields to choose and answer some questions about yourself. You should choose questions that only you know the answers to. You will need to answer these questions again to reset your password or unlock your account.

User name

Domain USHS ▾

Password

Question 1 ---- Choose a question ---- ▾

Answer

Question 2 ---- Choose a question ---- ▾

Answer

Cancel Next >>

Click *Next*, and when the confirmation appears, click *Main Menu*.

Registering your account




Click the *Reset Password* link to reset your password to something you can easily remember

TEOCO Password Management System



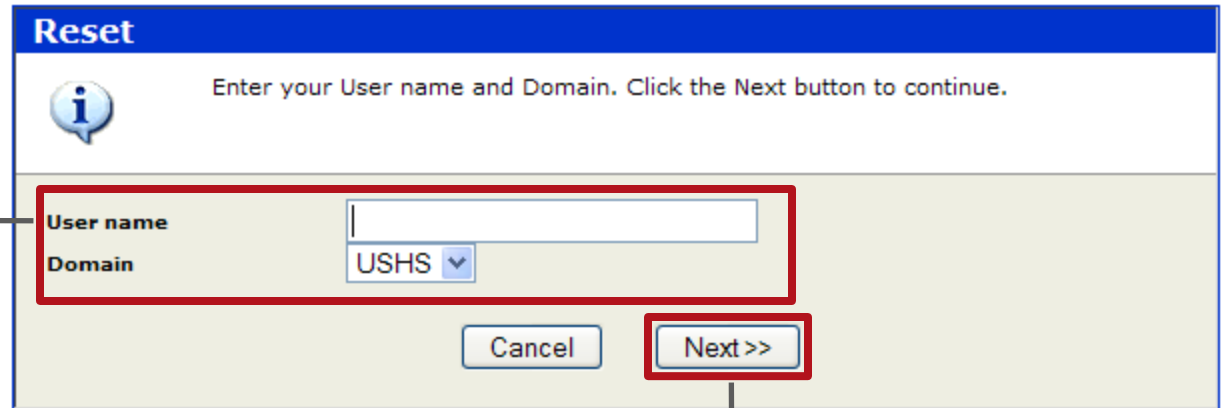
THE EMPLOYEE OWNED COMPANY

Welcome to the TEOCO Corporation password management system. This system allows you to change your password and unlock your account, even if you have forgotten your password.

- **Enroll**
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- **Reset**
Select this option if you have forgotten your password and would like to reset it. [Reset password](#)
- **Unlock**
Your account may become locked if the wrong password is entered too many times during logon. Select this option to unlock your account. [Unlock account](#)
- **Change**
Select this option if you know your current password and would like to change it. [Change password](#)

Registering your account

Enter your user name as you did in the enrollment window.



The screenshot shows a web form titled "Reset" with a blue header bar. Below the header is an information icon and the text "Enter your User name and Domain. Click the Next button to continue." The form contains two input fields: "User name" (a text box) and "Domain" (a dropdown menu showing "USHS"). A red rectangular box highlights both input fields and the "Next >>" button. The "Cancel" button is also visible.

Click *Next*. On the next two screens, answer your security questions. On the third screen, enter your new password. Click next and you will receive confirmation of your password change.

Registering your account

- **When you are selecting or resetting your password, please follow the guidelines below:**
 - Minimum of 8 characters
 - Mixed case (at least 1 capital)
 - Minimum of one special character or number
 - No part of your name or username can be part of your password
- **Passwords can only be changed once in a 24-hour period.**
 - If you have submitted a request to have your password changed by the TEOCO support team, you must wait to change your password.

Logging in to the Support Portal

The TEOCO Customer Support Portal can be accessed at:

<https://support.teocosolutions.com>

Logging in to the Support Portal



Enter your full username as supplied to you in your enrollment email, and the password you set in Password Management

Please enter login and password

Username	USHSIdoed	
Password	••••••••	

Remember Me

[Login](#)

Click *Login*

Home Page

The screenshot shows the TEOCO Customer Support Portal home page. At the top left is the TEOCO logo. To its right is a user profile box for 'Don Doe' with links for 'Account Settings' and 'Logout'. Below the logo is a left-side navigation pane with sections for 'PRODUCT/SERVICE SUPPORT', 'PASSWORD MANAGEMENT', and 'SUPPORT PORTAL ASSISTANCE'. The main content area features a welcome message, a 'Global News Feed' with two incident reports, and a 'Headlines' section. The right side of the page contains 'FAQs' and 'Logina In (1)'. Four callout boxes provide descriptions: 'Left Side Pane: Main navigation links for viewing and submitting support requests', 'Global News Feed: Latest updates on all support requests', 'Right Side Pane: Headlines and Support Portal FAQs', and 'Account Settings: Personalize and Logout'.

TEOCO

Welcome Don Doe
[Account Settings](#) | [Logout](#)

Welcome to the TEOCO Customer Support Portal!

To learn more about this portal and how to use it, please click the "How do I use this portal?" topic under Headlines in the box to the right

Global News Feed

Incident CAV1A2181 • 25 minutes ago
Please provide instructions on how to download the latest software upgrade from your website.
[Update](#)

Christina Sylvester • 25 minutes ago
The information is available on our website at www.teoco.com. We have established an account for you to access the download and sent the details to you via separate email.

Incident CAV173829 • 29 minutes ago
Reporting an issue with the user interface. I received an error message (see attached screenshot). Please resolve ASAP.
[Update](#)

Christina Sylvester • 29 minutes ago
We have been able to replicate the error message with the steps you provided. We have submitted this to Engineering to determine if there is a workaround.

Headlines
How do I use this po...

FAQs
Logina In (1)

Left Side Pane:
Main navigation links for viewing and submitting support requests

Global News Feed:
Latest updates on all support requests

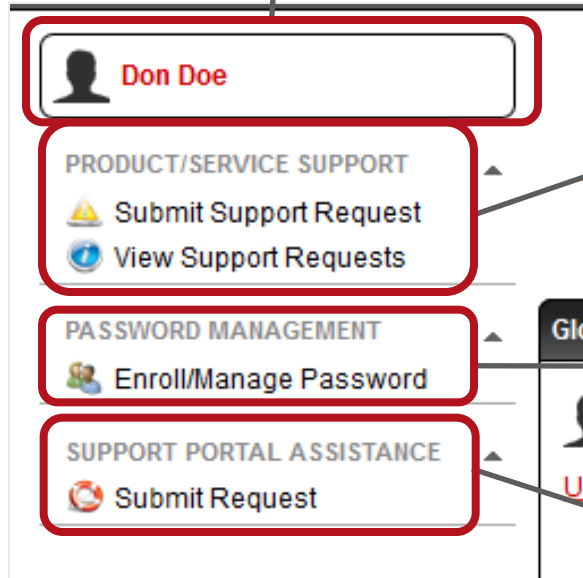
Right Side Pane:
Headlines and Support Portal FAQs

Account Settings:
Personalize and Logout

Home Page – Left Side Pane

Home Page Return:

- Click on your name (below) or the TEOCO logo to return to the home page at any time



Product/Service Support:

- Submit Support Request for TEOCO Product/Service (e.g. BTP, ViewLogic, Acuite, SONAR, Fault, etc.)
- View all previously submitted Support Requests for you and your team (based on configuration for each customer)

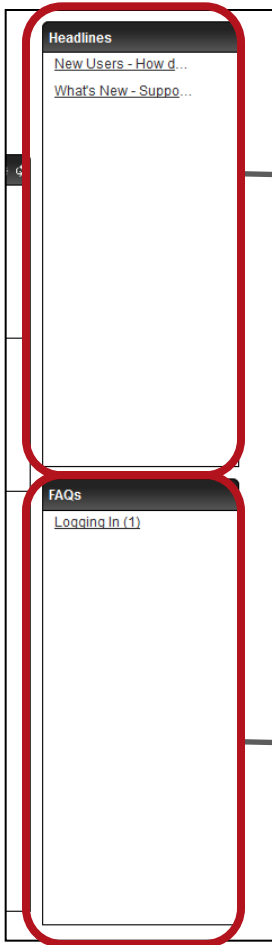
Password Management:

- Link to external Password Management tool (initial enrollment and password change/resets)

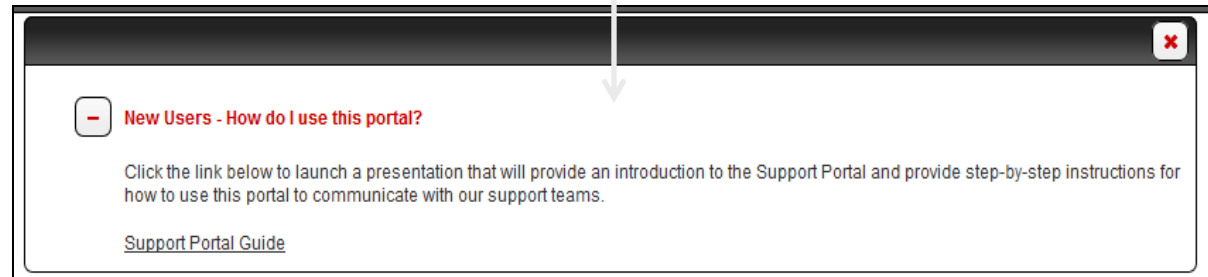
Support Portal Assistance:

- Submit request for Support Portal assistance (new Support Portal account, questions about features, report errors)

Home Page – Right Side Pane

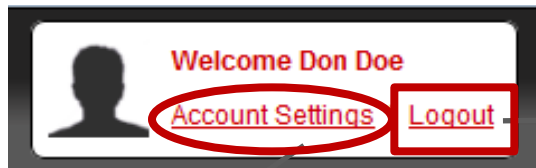


Headlines – Permanent links to new user training as well as the latest news we want you to know about the Support Portal (upcoming outages, new features, etc.)



FAQs – Topics related to the Support Portal such as logging in, Support processes, etc.

Home Page - Customer Options



Logout link – logout option to close active Support Portal session (no need to close the browser tab/window)

Account Settings:

- Set your local time zone to display all timestamps in your local time
- Load photo as avatar (optional)
- Manage custom feed list

A screenshot of the "Account Settings" page. It features three main sections: "Avatar", "Time Zone", and "Custom Feeds". The "Time Zone" section is expanded, showing a dropdown menu with the selected option "(UTC-08:00) Pacific Time (US & Canada)". A "Save" button is located below the dropdown. An arrow from the "Load photo as avatar" bullet point in the previous block points to the "Avatar" section header.

Home Page – Global News Feed

Global News Feed

Incident CAVJ285581 • Tuesday at 11:17 AM
Please update the following entry for me, if possible. I saved the data incorrectly and now I cannot edit it.
12345
[Update](#)

System • Tuesday at 11:17 AM
- New incident created.

Incident CAVI173829 • Tuesday at 10:51 AM
Reporting an issue with the user interface. I received an error message (see attached screenshot). Please resolve ASAP.
[Update](#) • [View all 3 entries](#)

Don Doe • Tuesday at 10:51 AM
Please provide the workaround as soon as possible. There are now multiple users reporting this issue.

Incident CAV1A2181 • Tuesday at 10:12 AM
Please provide instructions on how to download the latest software upgrade from your website.
[Update](#)

Christina Sylvester • Tuesday at 10:12 AM
The information is available on our website at www.teoco.com. We have established an account for you to access the download and sent the details to you via separate email.

Global News Feed:
Latest support request activity and updates

Configuration Options:
Uncheck "Group" to set News Feed to your own Support Requests

Configure Global News Feed Options

View For

Group

Incident

[Update](#) • [Close](#)

Don Doe • Tuesday at 10:51 AM
Please provide the workaround as soon as possible. There are now multiple users reporting this issue.

Christina Sylvester • Tuesday at 10:46 AM
Engineering confirms that there is a workaround available that will prevent the error message. They are currently documenting the steps and we will provide them to you by COB today.

Christina Sylvester • Tuesday at 10:08 AM
We have been able to replicate the error message with the steps you provided. We have submitted this to Engineering to determine if there is a workaround.

View/Update:
Use links to view all history entries, add an update, or click on the description to launch the full Support Request Detail.

Support Request Submission Screen

The screenshot shows the TEOCO Support Request Submission interface. At the top left is the TEOCO logo. At the top right, a user profile for 'Don Doe' is shown with links for 'Account Settings' and 'Logout'. Below the logo, a sidebar menu is visible with categories: 'PRODUCT/SERVICE SUPPORT', 'PASSWORD MANAGEMENT', and 'SUPPORT PORTAL ASSISTANCE'. The 'Submit Support Request' option is highlighted in the sidebar. The main content area features a 'Save' button, a table with request details (Number: CAVJ171525, Opened: 10/30/2012), and a 'Details' tab. The 'Description' field is a large text area with bold, italic, and underline formatting options. Below this are 'TEOCO Fields' and 'Attachments' sections. The 'Attachments' section includes a 'Select File' button and a 'Drop file here to upload' area. A 'Category Selection' callout points to the category list on the left, which includes 'Margin Assur. - Cost Mgmt', 'Margin Assur. - Routing Op', and 'Service Assurance'. A 'Details, Additional Fields, and Attachments' callout points to the main form area. A 'Click to launch Support Request Submission screen' callout points to the 'Submit Support Request' button in the sidebar.

Category Selection

Click the arrow button to the left of the Category name or double-click on the category name to expand the list and make your selection.


If you need assistance with the Support Portal, return to the main page by clicking on the TEOCO logo and select from the Support Portal Assistance menu.

- Margin Assur. - Cost Mgmt
- Margin Assur. - Routing Op
- Service Assurance

Details, Additional Fields, and Attachments

Click to launch Support Request Submission screen

Support Request Submission – Category Selection



Click the arrow button to the left of the Category name or double-click on the category name to expand the list and make your selection.


If you need assistance with the Support Portal, return to the main page by clicking on the TEOCO logo and select from the Support Portal Assistance menu.

- ▶ Margin Assur. - Cost Mgmt
- ▶ Margin Assur. - Routing Op
- ▶ Service Assurance



Category Selection:
Click the top-level category or click the arrow to the left of the value to expand the category list.

Make selection by clicking on the desired value (has to be expanded to the lowest possible level for the category set to make a selection).



Click the arrow button to the left of the Category name or double-click on the category name to expand the list and make your selection.

If you need assistance with the Support Portal, return to the main page by clicking on the TEOCO logo and select from the Support Portal Assistance menu.

- ▶ Margin Assur. - Cost Mgmt
 - ▶ Acuity
 - ▶ BillTrak OnDemand
 - ▶ BillTrak Pro
 - ▶ Claim Center
 - ▶ Invoice Automation
 - ▶ ViewLogic
- ▶ Margin Assur. - Routing Op
 - ▶ Acuite
 - ▶ AcuWorld
- ▶ Service Assurance
 - ▶ Activation
 - ▶ ATP
 - ▶ Call Expert
 - ▶ Fault
 - ▶ Client - cruiser
 - ▶ Client - DB
 - ▶ Correlator
 - ▶ Data Accuracy/Library
 - ▶ Database
 - ▶ FAM Service
 - ▶ FaultPro

Submit a New Product/Service Support Request

All TEOCO Products and Services will fall into one of the top-level categories below. The first category selection will be the top-most value. The next level of category selections will be retrieved from the respective bulleted list, based on the products and services your company is utilizing. Additional category selections (such as a module or application area) may be required based on the product or service selected.

Service Assurance

- Activation
- Call Expert
- Fault
- Mediation
- NeTkT
- Performance
- Secure Access

Customer Analytics

- HyperAnalytics
- Managed Hosting Services
- SONAR

Margin Assurance – Cost Mgmt

- Acuity
- BillTrak
- Claim Center
- Invoice Automation
- ViewLogic

Margin Assurance – Routing Optimization

- Acuite
- AcuWorld

Network Optimization

- Insight
- Maxima Mentor
- OptiPlanner
- Ultima Forte
- Ultima Mentor

Support Request Submission - Details

The screenshot shows the 'Support Request Submission - Details' page. At the top left, a 'Save & Submit' button is highlighted. To its right, a 'Related Items – Requests with the same categorization' section is shown, containing a 'Save' button, 'Related Items: Incidents: 1', 'Number: CAVJ285581', and 'Opened: 10/30/2012'. A 'Details' button is located above the 'Description' field. The 'Description' field is a large text area with bold, italic, and underline formatting options. Below it is the 'TEOCO Fields' section, which includes 'Customer Ticket Number' (text input), 'Severity' (dropdown menu with 'To be determined by TEOCO' and a warning icon), and 'Customer Priority' (dropdown menu with '--Select--' and a warning icon). The 'Attachments' section at the bottom features a 'Select File' button and the text 'Drop file here to upload'. On the left side, a category tree is visible, with 'ViewLogic' selected and highlighted by a red box. A callout box on the left explains that category selection activates 'Related Items and TEOCO Fields options'. Another callout box on the right explains that 'TEOCO Fields - Additional requested details. Required fields marked with icon.' The 'Attachments' callout box at the bottom explains that users can 'select from location on computer or drag/drop'.

Save & Submit

Related Items – Requests with the same categorization

Category selection activates Related Items and TEOCO Fields options

Description

TEOCO Fields - Additional requested details. Required fields marked with icon.

Attachments – select from location on computer or drag/drop

Viewing Support Requests – Incident Feed

TEOCO

Welcome Don Doe
[Account Settings](#) | [Logout](#)

Don Doe

Type a search term to search existing requests

PRODUCT/SERVICE SUPPORT

[View Support Requests](#)

PASSWORD MANAGEMENT

Enroll | Manage Password

Incident Feed

Sort by **Category**

Incident CAV1173829 Category is ViewLogic | Customer is Don Doe | Status is Open
Description is Reporting an issue with the user interface. I received an error message (see attached screenshot). Please resolve ASAP.
Resolution is
Update • [View all 3 entries](#)

Don Doe • 8 minutes ago
Please provide the workaround as soon as possible. There are now multiple users reporting this issue.

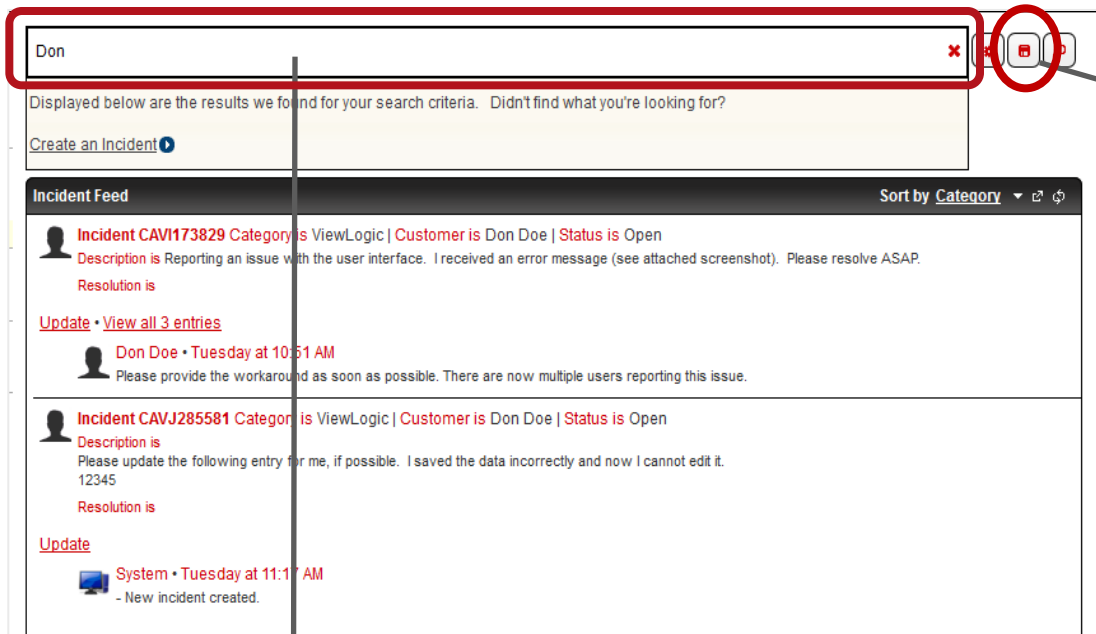
Incident CAV1A2181 Category is AcuCDR | Customer is Kim Doe | Status is Open
Description is Please provide instructions on how to download the latest software upgrade from your website.
Resolution is
Update

Christina Sylvester • 46 minutes ago
The information is available on our website at www.teoco.com. We have established an account for you to access the download and sent the details to you via separate email.

Click to launch Incident Feed

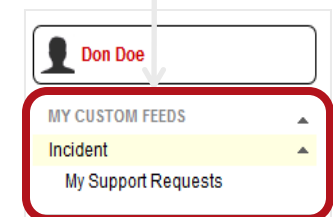
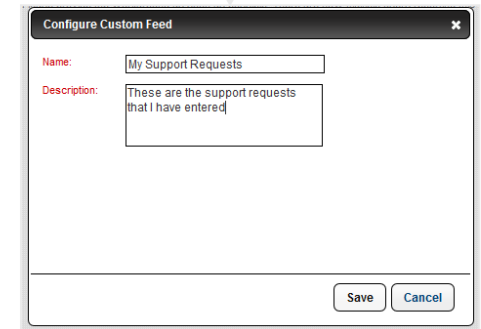
Incident Feed:
All open and closed support requests for you and your team.

Viewing Support Requests – Searches and Custom Feeds

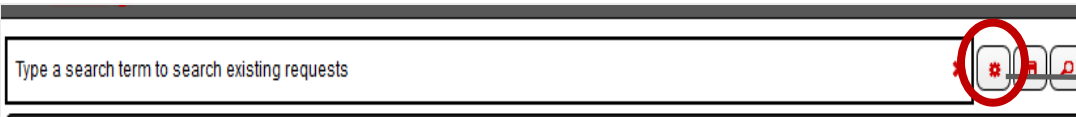


Save Search – saves the search terms/options for any search as a “Custom Feed” so that the search can be run as needed. Custom Feeds can be accessed from the right side navigation menu.

Search Bar – Type a search term to search existing open and closed support requests for you and your team based on pre-set search fields (retrieved from Advanced Search settings – see next slide). If no results are retrieved, there is a “Create an Incident” link to open a new support request.



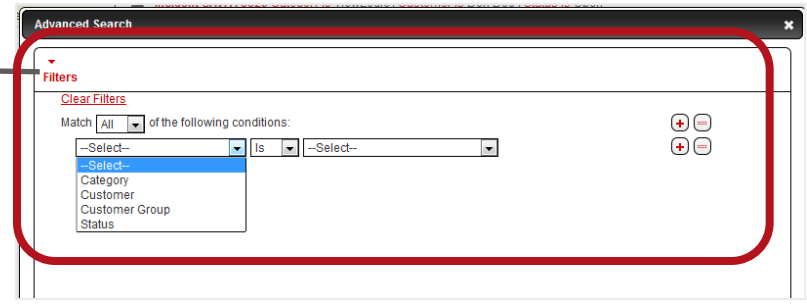
Viewing Support Requests – Advanced Search Options



Advanced Search – Set custom search filters and/or fields to search

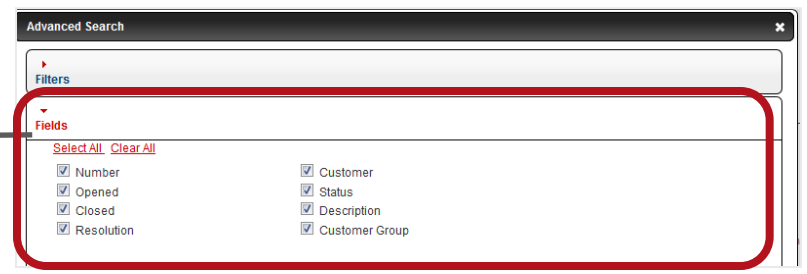
Filter Options:

- Set (Is) or exclude (Is Not) specific category, customer, customer group, or status
- Allows multiple filter levels.
- Select values from drop-down lists/selection screens

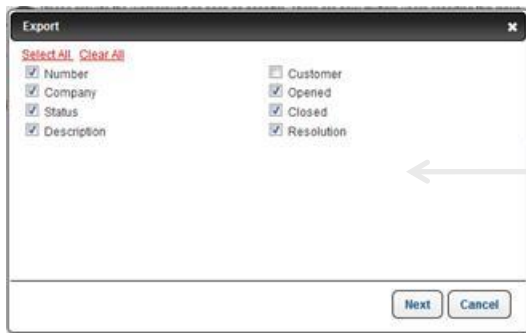
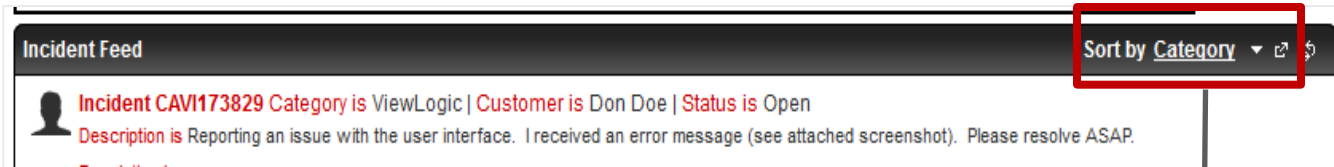


Field Options:

- Select fields to be searched by checking/unchecking options.
- Selections are saved and applied to all future searches (standard and advanced) until options are changed.

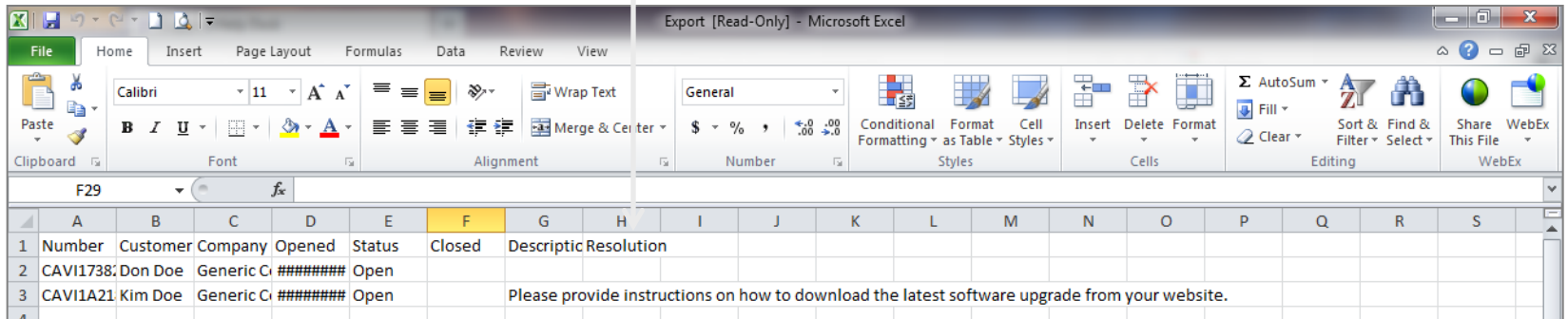


Viewing Support Requests – Sort Options and Export



Sort Options: Multiple fields available for sorting, up/down arrow sets ascending or descending order for selected field.

Export: Exports current Incident Feed records to Excel as “.csv” file. Select export fields, specify set of records to export, and destination.



Viewing Support Requests – Single Request Display

The screenshot shows a web interface for viewing a support request. At the top, there are buttons for 'Update', 'Change History Settings', and 'Print'. Below these are several fields for request details:

- Category:** Margin Assur. - Cost Mgmt ViewLogic
- Number:** CAV1173829
- Customer:** Don Doe
- Company:** Generic Communic...
- Opened:** 10/30/2012
- Status:** Closed
- Closed:** 11/2/2012

Below the fields are tabs for 'Details' and 'Attachments'. The 'Details' tab is active, showing the following information:

- Description:** Reporting an issue with the user interface. I received an error message (see attached screenshot). Please resolve ASAP.
- Resolution:** Engineering has provided a workaround to prevent this error and will be releasing a patch within the next week to correct the underlying issue. The workaround has been provided as an advisory to all impacted customers.
- TEOCO Fields:**
 - Customer Ticket Number:
 - Severity: 3 - Minor
 - Customer Priority: High
- History:**
 - Created on 10/30/2012 10:51 AM | Type is Work History | Added by Don Doe
Update submitted by Don Doe (sylvester@TEOCO.com) via the Social Client: Please provide the workaround as soon as possible. There are now multiple users reporting this issue.
 - Created on 10/30/2012 10:46 AM | Type is Work History | Added by Christina Sylvester
Engineering confirms that there is a workaround available that will prevent the error message. They are currently documenting the steps and we will provide them to you by COB today.
 - Created on 10/30/2012 10:08 AM | Type is Work History | Added by Christina Sylvester
We have been able to replicate the error message with the steps you provided. We have submitted this to Engineering to determine if there is a workaround.

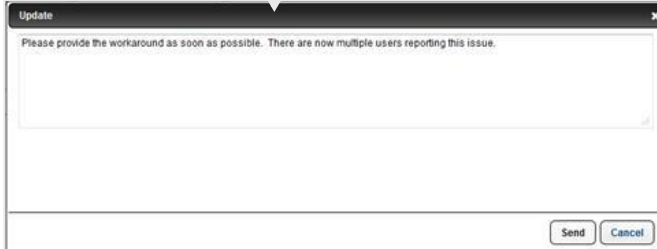
Callout boxes provide additional context:

- Category & Related Items:** Points to the Category and Related Items fields.
- Basics: Number, Customer, Status, Opened/Closed Dates:** Points to the Number, Customer, Status, and Closed fields.
- Attachments Tab: View or Add:** Points to the Attachments tab.
- Details Tab: Description, Resolution, Additional Fields, History/Updates (in desc. order):** Points to the Description, Resolution, TEOCO Fields, and History sections.

Viewing Support Requests – Actions

Update –

Launches Update dialog window to submit an update on this support request



Update dialog window with a text area and Send/Cancel buttons.

Please provide the workaround as soon as possible. There are now multiple users reporting this issue.

Send Cancel

Update

Change History Settings

Print

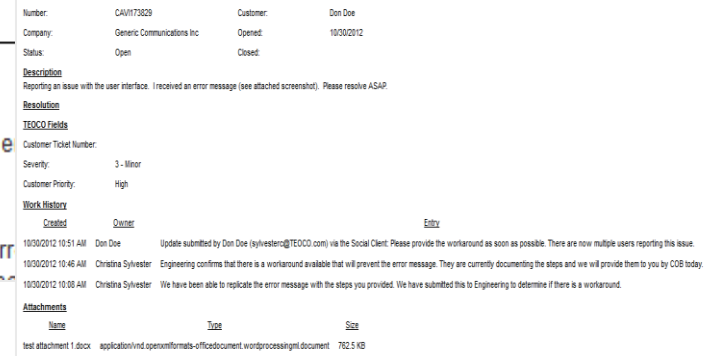
Category: Margin Assur. - Cost Mgmt
ViewLogic

Number: CAVI173829
Opened: 10/30/2012

Customer: Customer:
Status: Status:

Related Items:
Incidents: 2

Print – Opens a print-friendly view of all support request details in a new browser tab/window



Print-friendly view of support request details including fields for Number, Company, Status, Description, Resolution, and Attachments.

Number: CAVI173829 Customer: Don Doe
Company: Generic Communications Inc Opened: 10/30/2012
Status: Open Closed

Description
Reporting an issue with the user interface. I received an error message (see attached screenshot). Please resolve ASAP.

Resolution

TEOCO Fields
Customer Ticket Number:
Severity: 3 - Minor
Customer Priority: High

Work History

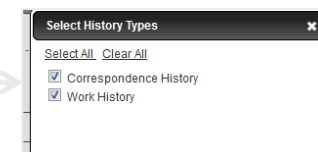
Created	Owner	Entry
10/30/2012 10:51 AM	Don Doe	Update submitted by Don Doe (sylvester@TEOCO.com) via the Social Client. Please provide the workaround as soon as possible. There are now multiple users reporting this issue.
10/30/2012 10:46 AM	Christina Sylvester	Engineering confirms that there is a workaround available that will prevent the error message. They are currently documenting the steps and we will provide them to you by COB today.
10/30/2012 10:08 AM	Christina Sylvester	We have been able to replicate the error message with the steps you provided. We have submitted this to Engineering to determine if there is a workaround.

Attachments

file	Type	Size
test attachment 1.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document	762.5 KB

Change History Settings –

Opens a dialog window allowing user to show only Work History or only Correspondence History



Select History Types dialog window with checkboxes for Correspondence History and Work History.

Select All Clear All

Correspondence History
 Work History

Update an Existing Support Request via Email

- In addition to sending an update from the Support Portal, existing support requests can be updated by responding to the system generated e-mail or by sending an email to the Support Portal's email address, **as long as you include the support request number either in the subject or body of the email.**
 - For matched emails, the system will automatically update the request within the Customer Support Portal and be noted in the correspondence history.
- **If you do not include a support request number in the subject or body of the email, the email will not be processed by the system or reviewed by the support team.**

Reviewing Resolved Support Requests

- Once your support request is closed, you will receive a resolution email.
 - If your support request was not resolved to your satisfaction, you may **update the existing support request** (as opposed to opening a new request). TEOCO will assess your update and either re-open the existing request or start a new request.

It's That Easy

- Our intention is for the TEOCO Customer Support Portal to be a helpful, easy-to-use tool for you to communicate with our Customer Support team.
- If you have any questions about the Customer Support Portal, please use the “Submit Request” option under the Support Portal Assistance menu option on the Support Portal home page or contact your Account Manager.

Thank you!