A wide-angle photograph of the New York City skyline at dusk, featuring the Freedom Tower and other skyscrapers. The sky is a mix of blue and orange, with light clouds. A semi-transparent red rectangular box is centered over the image, containing white text.

TEOCO CUSTOMER SUPPORT PORTAL

NEW USER TRAINING GUIDE



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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



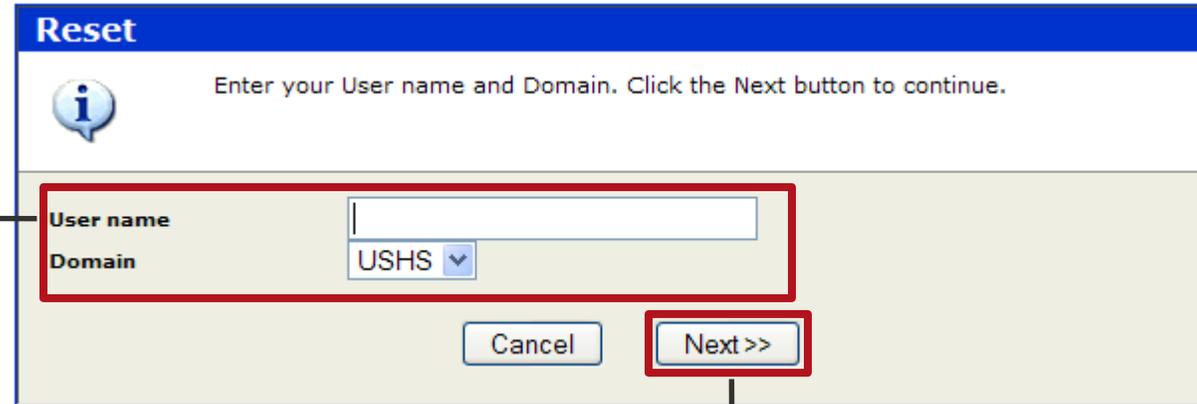
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- **Reset**
Select this option if you have forgotten your password and would like to reset it. [Reset password](#)
- **Unlock**
Your account may become locked if the wrong password is entered too many times during logon. Select this option to unlock 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 'Reset' dialog box with a blue header. Below the header is an information icon and the text 'Enter your User name and Domain. Click the Next button to continue.' The main area contains two input fields: 'User name' (a text box) and 'Domain' (a dropdown menu showing 'USHS'). A red box highlights both input fields. Below the fields are two buttons: 'Cancel' and 'Next >>'. A red box highlights the 'Next >>' button. A line connects the 'Next >>' button to the bottom text box.

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

The screenshot shows the TEOCO login interface. At the top is the TEOCO logo. Below it is a login form titled "Please enter login and password". The form contains a "Username" field with the text "USHSIdeoed" and a "Password" field with masked characters. There is a "Remember Me" checkbox and a "Login" button. Two grey callout boxes provide instructions: one on the left points to the username and password fields with the text "Enter your full username as supplied to you in your enrollment email, and the password you set in Password Management"; another on the bottom right points to the "Login" button with the text "Click *Login*".

HOME PAGE

The screenshot shows the TEOCO Customer Support Portal home page. At the top left is the TEOCO logo. The top right shows a user profile for 'Don Doe' with links for 'Account Settings' and 'Logout'. The main content area is divided into three panes: a left navigation pane, a central global news feed, and a right side pane. The left pane contains links for 'PRODUCT/SERVICE SUPPORT', 'PASSWORD MANAGEMENT', and 'SUPPORT PORTAL ASSISTANCE'. The global news feed displays three incident updates. The right pane contains 'Headlines' and 'FAQs' sections. Three callout boxes provide descriptions for the left side pane, global news feed, and right side pane.

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
[Logging In \(1\)](#)

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

Global News Feed:
Latest updates on all support requests

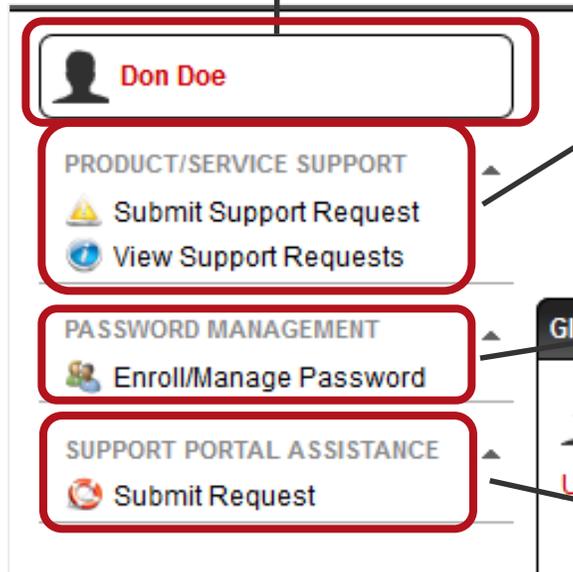
Right Side Pane:
Headlines and Support Portal FAQs

Account Settings:
Personalize and Logout

HOME PAGE – LEFT SIDE PANEL

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)

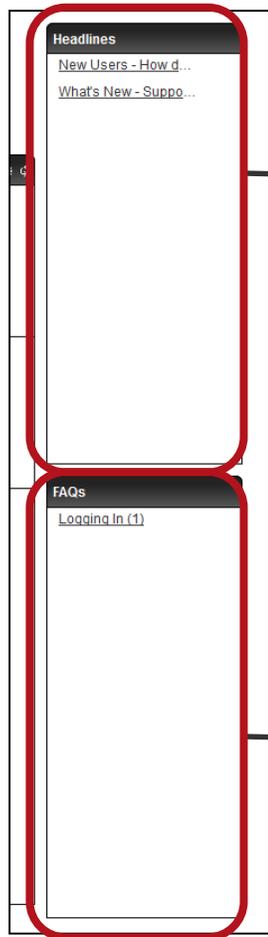
Password Management:

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

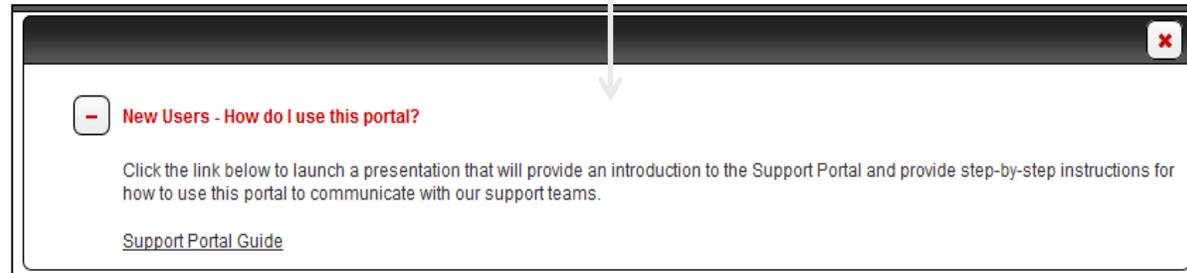
Support Portal Assistance:

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

HOME PAGE – RIGHT SIDE PANEL

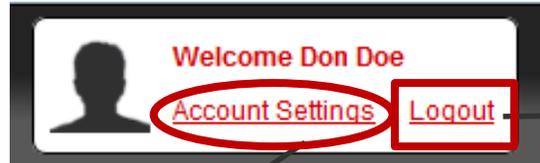


Headlines – Permanent links to new user training as well as the latest news we want you to know about the Support Portal (upcoming outages, new features, etc.)



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. The page has a dark header with the title 'Account Settings'. Below the header, there are three sections: 'Avatar', 'Time Zone', and 'Custom Feeds'. The 'Time Zone' section is expanded, showing a dropdown menu with the text '(UTC-08:00) Pacific Time (US & Canada)'. A 'Save' button is located below the dropdown. An arrow from the 'Account Settings' list points to the dropdown menu.

HOME PAGE – GLOBAL NEWS FEED

Global News Feed: Latest support request activity and updates

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

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

The screenshot shows a 'Global News Feed' with several incident entries. A gear icon in the top right corner is circled in red, pointing to a 'Configure Global News Feed Options' dialog box. In this dialog, the 'Group' checkbox is circled in red and has an arrow pointing to the text 'Uncheck "Group" to set News Feed to your own Support Requests'. The 'Incident' checkbox is checked. Below the main feed, a callout box shows a detailed view of an incident entry with 'Update' and 'View all 3 entries' links circled in red. Another callout box shows a detailed view of an incident entry with an 'Update' link circled in red. A third callout box shows a detailed view of an incident entry with a 'Cancel Update' link circled in red.

SUPPORT REQUEST SUBMISSION SCREEN

The screenshot displays the TEOCO user interface for submitting a support request. At the top, the TEOCO logo is on the left, and a user profile for 'Don Doe' with 'Welcome Don Doe' and links for 'Account Settings' and 'Logout' is on the right. A left-hand navigation menu includes 'Submit Support Request' (highlighted with a red box), 'View Support Requests', 'PASSWORD MANAGEMENT', 'Enroll/Manage Password', and 'SUPPORT PORTAL ASSISTANCE'. A red-bordered callout box provides instructions: '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.' Below this, it says '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.' and lists categories: 'Margin Assur. - Cost Mgmt', 'Margin Assur. - Routing Op', and 'Service Assurance'. The main content area shows a 'Save' button, a 'Number' field with 'CAVJ171525', and an 'Opened' field with '10/20/2016'. A 'Details' tab is active, showing a 'Description' field with bold, italic, and underline formatting options. Below the description are 'TEOCO Fields' and 'Attachments' sections. The 'Attachments' section includes a 'Select File' button and the text 'Drop file here to upload'. A red-bordered callout box highlights the 'Description' field and the 'Attachments' section, with a label 'Details, Additional Fields, and Attachments'. A grey callout box on the right is labeled 'Category Selection'. A grey callout box at the bottom left is labeled 'Click to launch Support Request Submission screen'.

SUPPORT REQUEST SUBMISSION – CATEGORY SELECTION

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).

Left Panel (Initial View):
User: Don Doe
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.
List:

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

Right Panel (Expanded View):
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.
List:

- 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 - FE
 - 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 'Details' page for a support request. At the top, there is a 'Save & Submit' button and a 'Related Items' section showing 1 incident with number CAVJ285581, opened on 10/30/2012. The main content area includes a 'Description' field with rich text formatting options (B, I, U), 'TEOCO Fields' with 'Customer Ticket Number', 'Severity' (set to 'To be determined by TEOCO'), and 'Customer Priority' (set to '--Select--'). There are also 'Attachments' with a 'Select File' button and a drop zone. A left sidebar contains a category tree with 'ViewLogic' selected. Callouts point to these elements: 'Save & Submit', 'Related Items - Requests with the same categorization', 'Description', 'TEOCO Fields - Additional requested details. Required fields marked with icon.', and 'Attachments - select from location on computer or drag/drop'. A separate callout on the left states 'Category selection activates Related Items and TEOCO Fields options'.

Save & Submit

Related Items – Requests with the same categorization

Description

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

Attachments – select from location on computer or drag/drop

Category selection activates Related Items and TEOCO Fields options

VIEWING SUPPORT REQUESTS – INCIDENT FEED

TEOCO

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

Don Doe

PRODUCT/SERVICE SUPPORT
[Submit Support Request](#)
[View Support Requests](#)
PASSWORD MANAGEMENT
[Enroll](#) [Manage Password](#)

Type a search term to search existing requests

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.

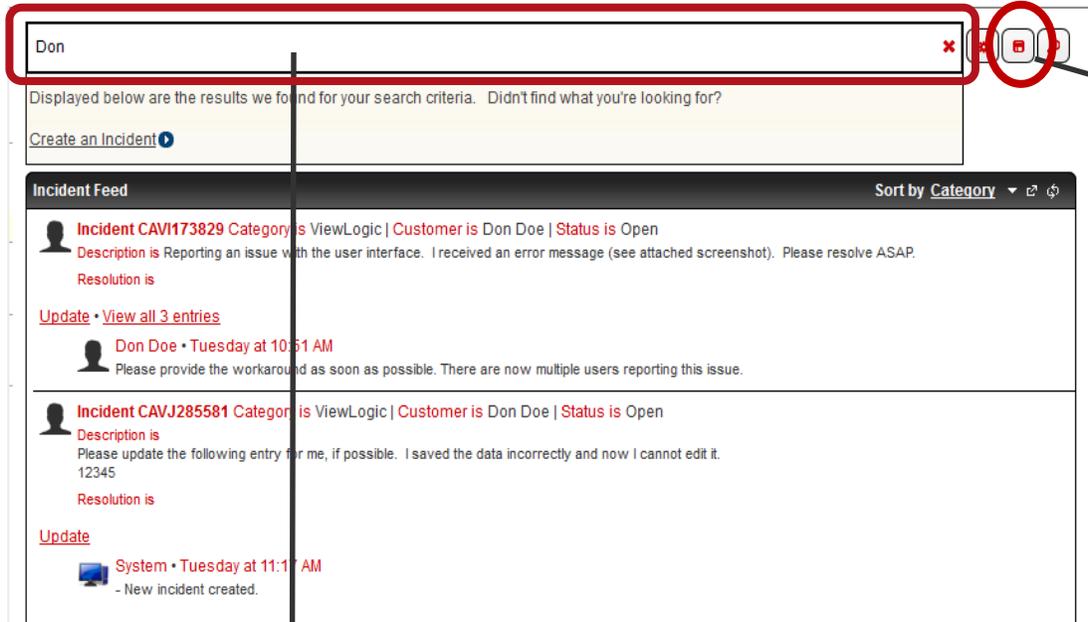
Incident CAV1A2181 Category is AcuCDR | Customer is Kim Doe | Status is Open
Description is Please provide instructions on how to download the latest software upgrade from your website.
Resolution is
Update

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

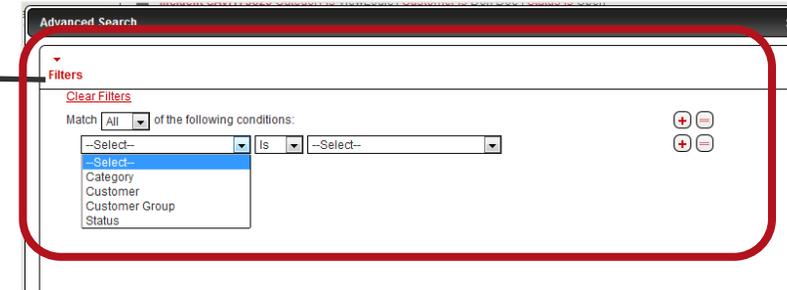
Type a search term to search existing requests



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

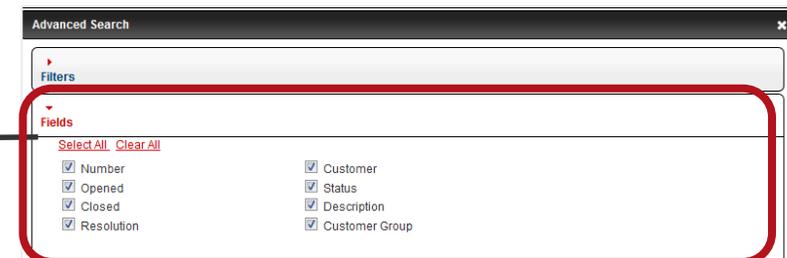
Filter Options:

- 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

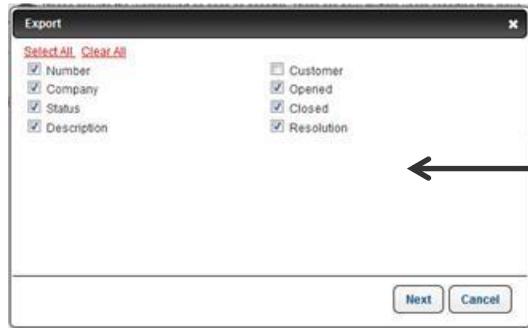
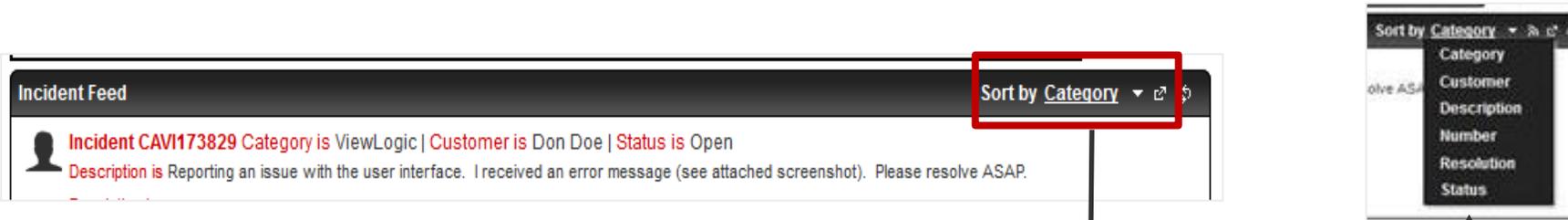


Field Options:

- 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.

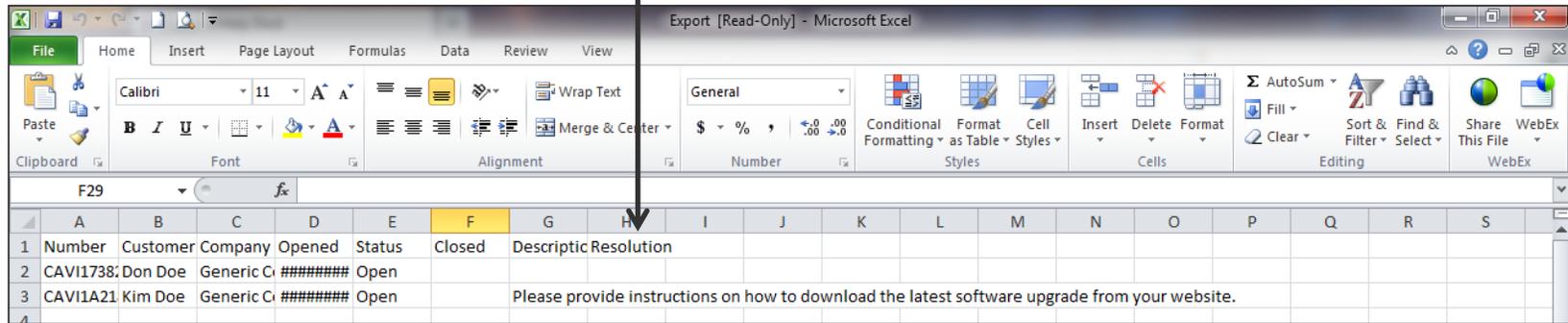


VIEWING SUPPORT REQUESTS – SORT OPTIONS AND EXPORT



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 this is a header section with fields for 'Category', 'Number', 'Customer', 'Company', 'Opened', 'Status', and 'Closed'. The 'Category' field is highlighted with a red box and labeled 'Category & Related Items'. The 'Number', 'Customer', 'Status', and 'Closed' fields are also highlighted with a red box and labeled 'Basics: Number, Customer, Status, Opened/Closed Dates'. Below the header are two tabs: 'Details' and 'Attachments'. The 'Attachments' tab is highlighted with a red box and labeled 'Attachments Tab: View or Add'. The main content area is divided into sections: 'Description', 'Resolution', 'TEOCO Fields', and 'History'. The 'Description' and 'Resolution' sections are highlighted with a red box and labeled 'Details Tab: Description, Resolution, Additional Fields, History/Updates (in desc. order)'. The 'TEOCO Fields' section contains 'Customer Ticket Number', 'Severity', and 'Customer Priority'. The 'History' section contains three entries, each with a timestamp, type, and author.

Category & Related Items

Basics: Number, Customer, Status, Opened/Closed Dates

Attachments Tab: View or Add

Details Tab: Description, Resolution, Additional Fields, History/Updates (in desc. order)

Update **Change History Settings** **Print**

Category: Margin Assur. - Cost Mgmt
ViewLogic

Number: CAVI173829

Customer: Don Doe

Company: Generic Communic...

Opened: 10/30/2012

Status: Closed

Closed: 11/2/2012

Related Items:
Incidents: 2

Details **Attachments**

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

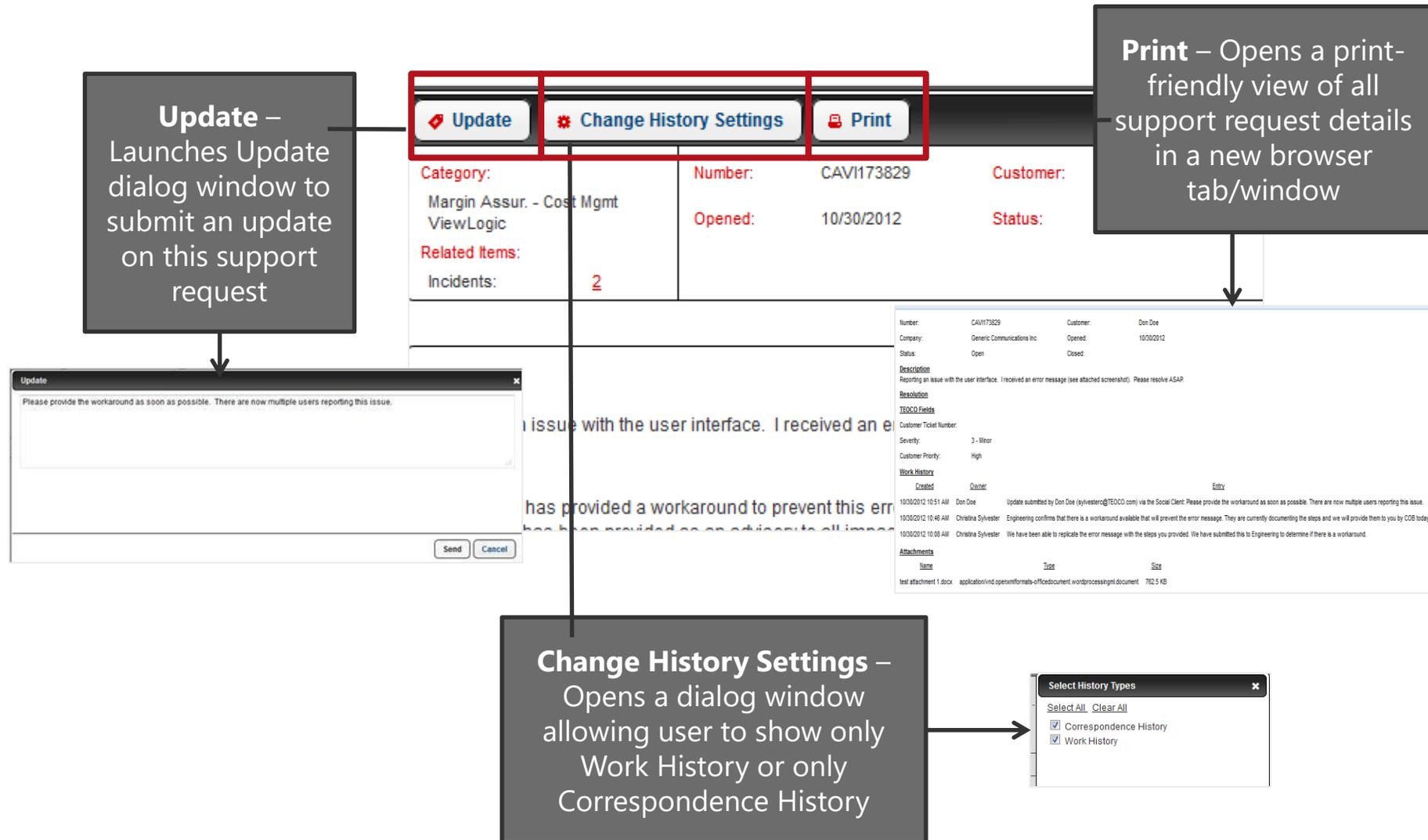
History

Created on 10/30/2012 10:51 AM | Type is Work History | Added by Don Doe
Update submitted by Don Doe (sylvesterc@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.

VIEWING SUPPORT REQUESTS – ACTIONS



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
www.teoco.com