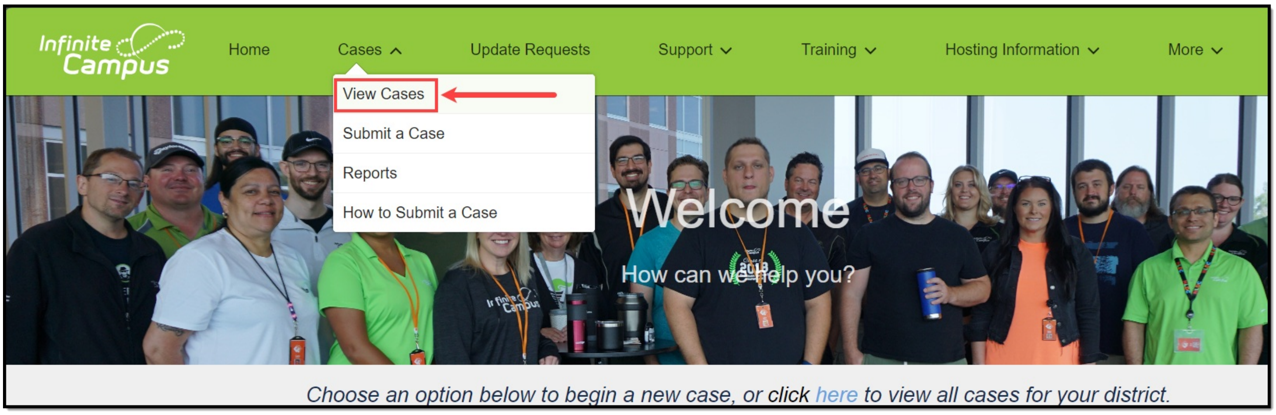
Viewing and Communicating on Cases

Last Modified on 03/15/2024 1:04 pm CDT

Case Search | Search Results | Viewing and Communicating on Cases | | Manage Notification Recipients | Case Status Workflow

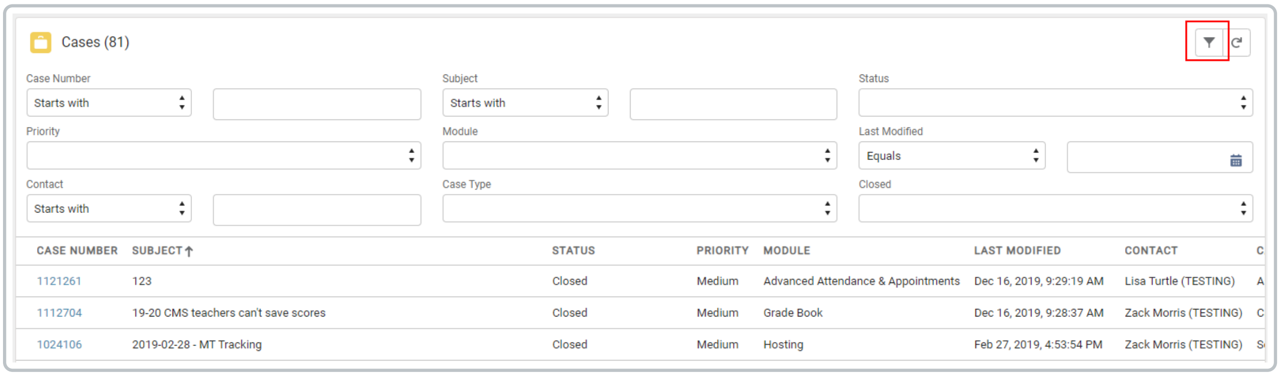
Case Search

The Support Portal provides Technical and Authorized Support Contacts access to view and post comments on all cases for their district. A list of all cases is presented by default when selecting **Cases > View Cases** from the dropdown list. Cases are sorted by **last modified date** and columns can be toggled to quickly sort by status, modified date, module, etc.



Displayed cases may be refined by clicking on the funnel icon to display filters. Using multiple filters will narrow the results, only returning entries that meet the requirements of each entered field. For example, searching for "Grade Book issues" (Subject) created by a selected contact will only return cases matching both of those instances, while only entering "Grade Book issues" in the Subject field will return issues entered by all users.

When available, use the dropdowns to further refine your search. For example, Subject may be filtered using Equals, Not equals, Starts with, Ends with, Contains, and Does not contain.



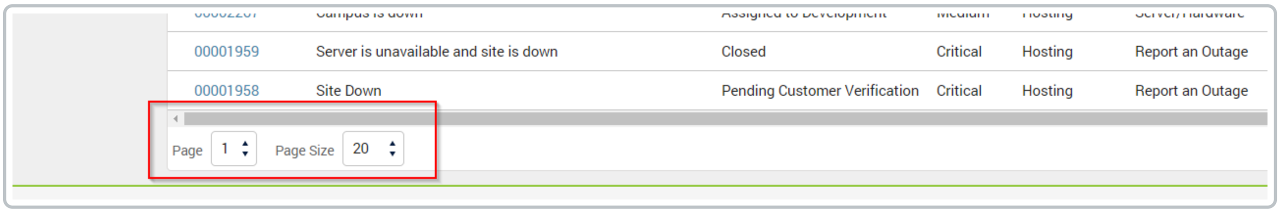
The following fields are available.

Option	Description
Case Number *Standard*	Enter the number assigned to the case when it was created.
Subject *Standard*	Enter the title of the case or a keyword that can be used to locate the case. Entering a phrase like "grade book issues" might not return results, but "grade book" will.
Status *Standard*	Indicates the status assigned to the case. Also see the Case Status Workflow. Options are: • **New** - case has been created but not yet assigned to a Campus support resource. • **Assigned** - case has been created and assigned to a Campus support resource. • **Assist Request** - case is pending the input of an internal Campus resource. • **Pending Customer Input** - case requires additional information from an Authorized Support Contact in order to seek resolution. • **Pending Customer Verification** - case resolution is awaiting final confirmation from the Authorized Support Contact. • **Scheduled** - action required to meet request has been scheduled to take place on a future date, such as a planned training. • **Assigned to Development** - case has been escalated for Campus Development to modify functionality in the product. • **Closed** - case has been resolved, meeting the needs of the user and marked as complete by your Campus support resource. • **Available in Release** - issue reported in the case has been developed and is available in a Campus Release Pack. • **Re-Opened** - previously closed case has been re-opened by the customer and is awaiting further assistance from a Campus support resource.
Priority	Indicates the level of urgency associated with the case. Options are: • **Critical** - Campus is not operational • **High** - Inability to perform a time-sensitive task • **Medium** - Usable, but functionality is affected • **Low** - Questions, advice and training-related issues
Module	Selected option relates to the area of Campus where the issue is occurring.

Option	Description
Case Type	Selected option indicates the type of case that was entered. Options are: • Ask a Question • Application Issue • Data Restore • Modify Support Contacts • Report an Outage • Server/Hardware • Server Access • Request Training • Request Consulting • Request Technical Services The category on a case is automatically populated based on the screen the case is completed from.
Contact	The Authorized Support or Technical Contact assigned to the case.
Last Modified	Date that the case was last updated or last communicated on.
Account	Name of the district that submitted the case.

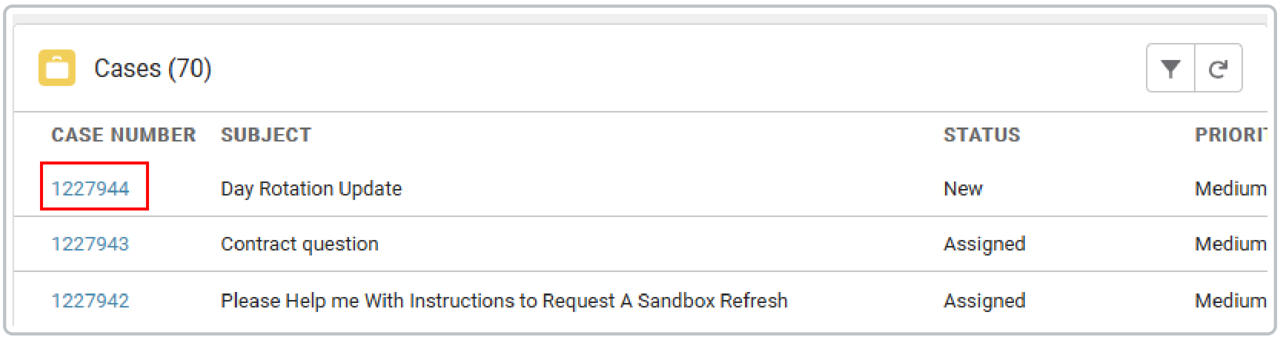
Search Results

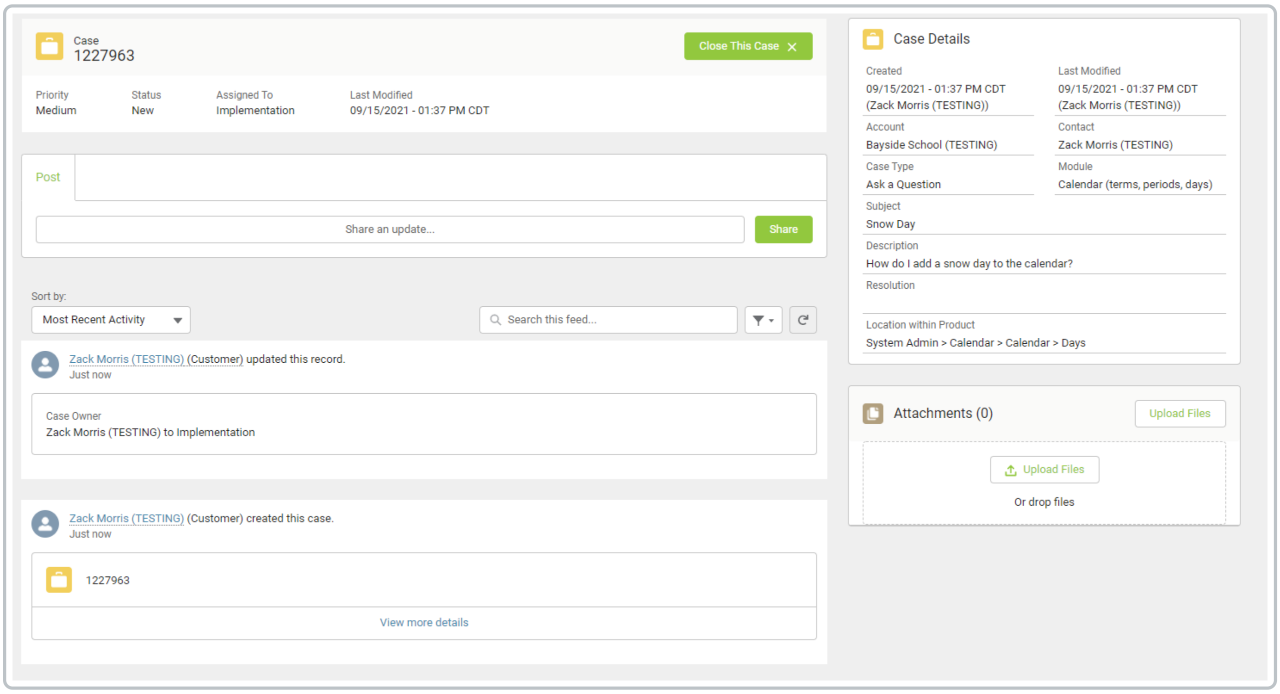
The number of Results returned displays at the top of the Cases window. The number of cases returned per page is automatically set to 20. This number can be changed by updating the Page Size value that displays at the bottom of the cases list. When this value is changed, the number of pages also changes. Advance to a new page in the search results by choosing a new page number under the Page dropdown.



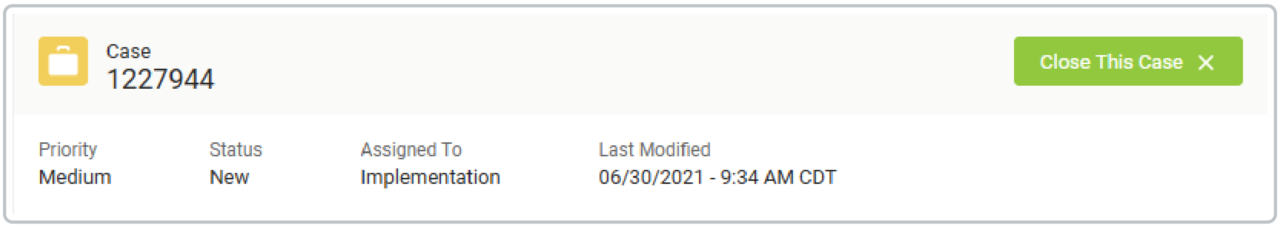
Viewing and Communicating on Cases

Clicking on a **Case Number** will open it to view, add attachments, communicate with Support, or close.



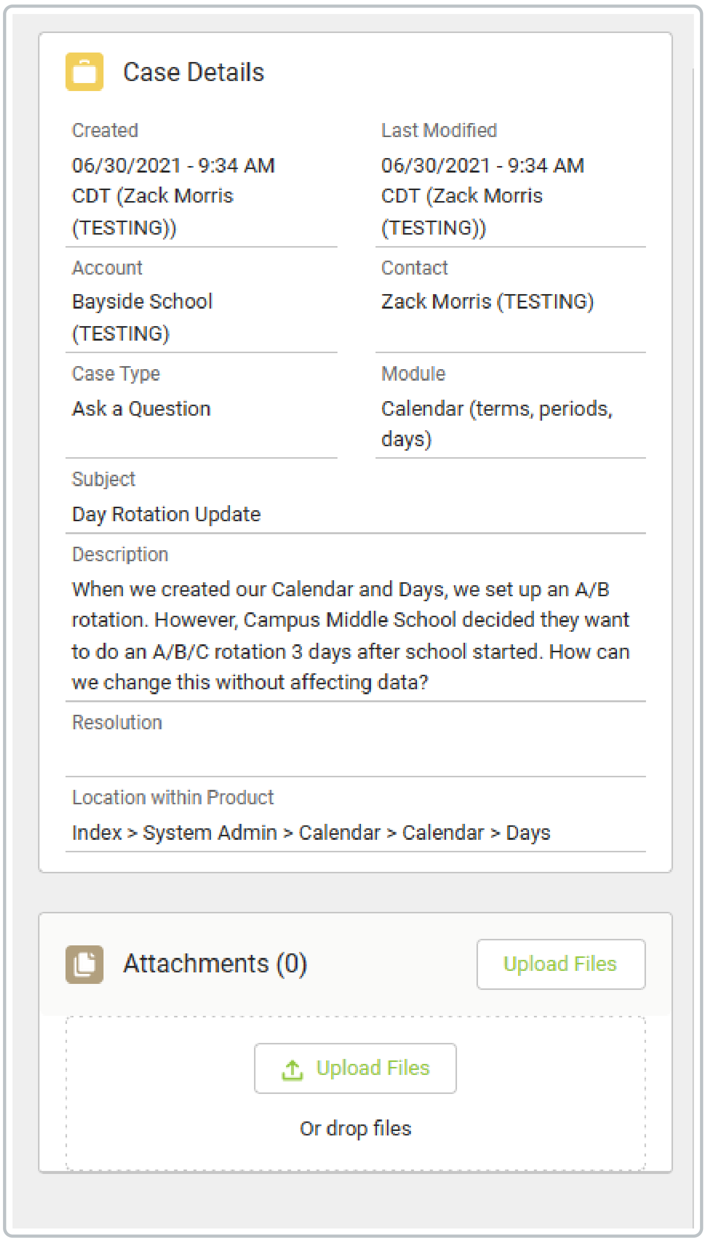


The top panel of a case displays important information including its Case Number, Priority, Status in its life cycle, who in Support the case is assigned to, and its last modified date. Cases may be closed (or re-opened) using the button at the top.

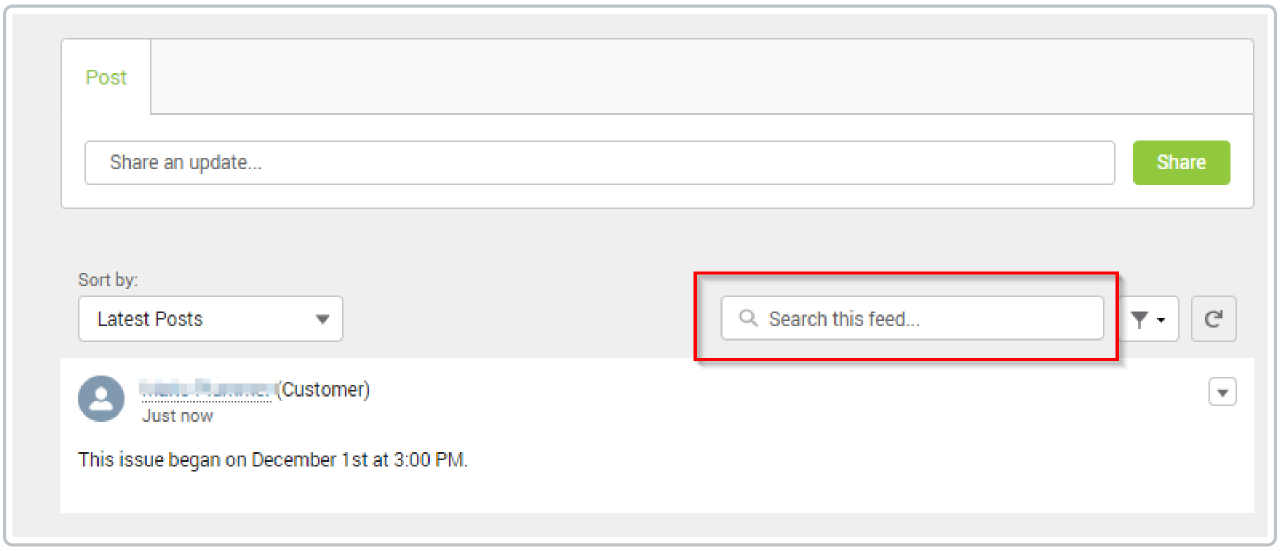


Case Details on the right side of the screen includes the information provided by the contact at the time of case creation, and/or case qualification information added by Support.

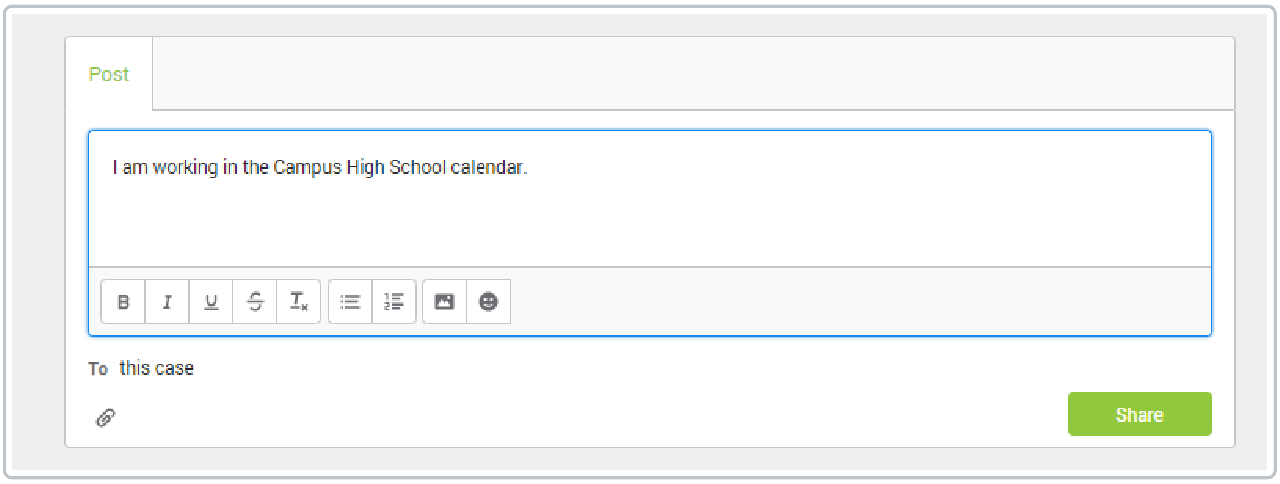
All attachments (added by the district or Campus) display in the Attachments area for easy access. Click on the text **Attachments** to expand the box and view additional details.



Written case communications between Authorized Support Contacts and Campus are called **Posts**. Posts display in the case's **Feed** with the most recent at the top. Posts may be searched using the "Search this feed" box.



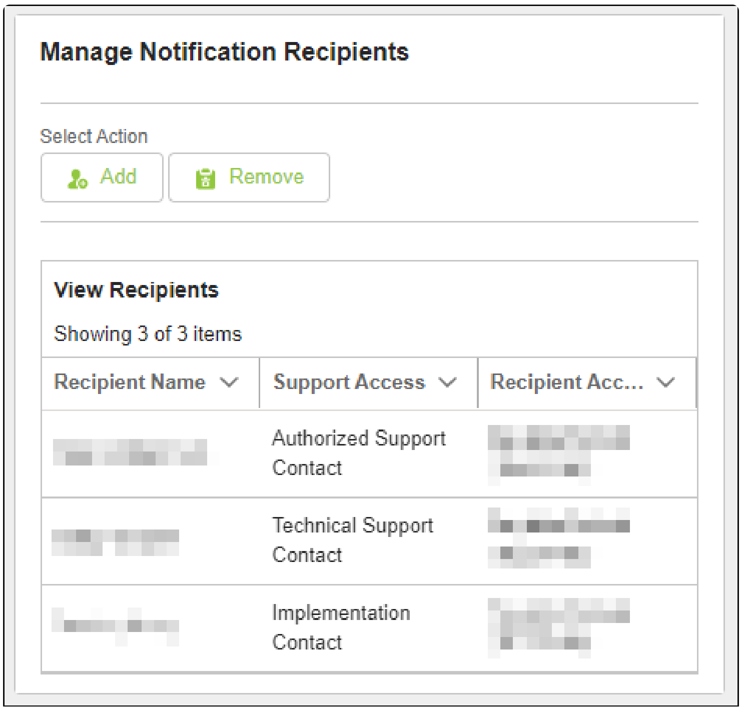
To add a Post to a case, click into the Post box that says "Share an update". An editor box will appear. Type your message into the editor and hit Share to submit. Note that you may format your text, add bullets or numbers to your steps, or add saved images directly into your Post. The paperclip icon may also be used to attach files to your post. Up to 10 attachments can be added at the same time. Max file size is 15MB.



Manage Notification Recipients

The Manage Notification Recipients tool allows districts to manage who receives notifications on a case. All Support contacts (Authorized, Technical, and Implementation) who have access to modify cases can see this tool and be added or removed as a recipient. Read-Only contacts can also see this tool but they can only add or remove themselves as a recipient.

The Manage Notification Recipients tool for Support Contacts:



The Manage Notification Recipients tool for Support Contacts

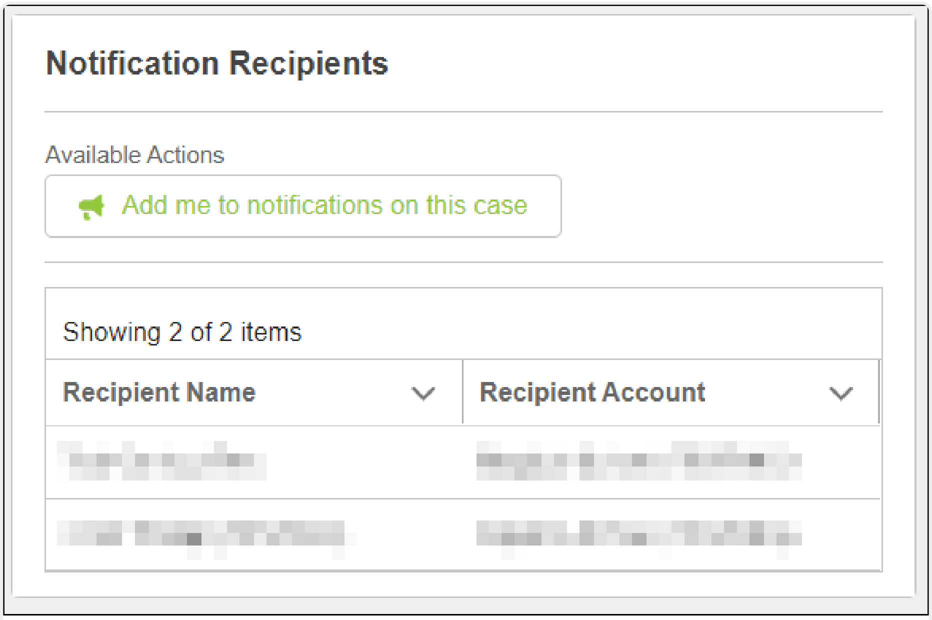
To add a Support Contact as a notification recipient:

1. Click **Add**.
2. From the contacts list, select which contact(s) to add and click **Next**. Non-contacts and Read-Only contacts are not listed. If the district would like to create a new contact, select the **Modify Support Contacts** link to submit a case.
3. Confirm the contact(s) to add and click **Next**.
4. Once the contacts have been added successfully, click **Finish**.

To remove a Support Contact as a notification recipient:

1. Click **Remove**.
2. From the contacts list, select which contact(s) to remove and click **Next**. The case owner cannot be removed as a notification recipient and will not be listed as an option.
3. Confirm the contact(s) to remove and click **Next**.
4. Once the contacts have been successfully removed, click **Finish**.

The Manage Notification Recipients tool for Read-Only Contacts:



The Manage Notification Recipients tool for Read-Only Contacts.

To add or remove a Read-Only Contact as a notification recipient, click **Add me to notifications on this case** or **Remove me from notifications on this case.**

Case Status Workflow

The following workflow demonstrates how a case moves through our system.