Managing Support Portal Cases

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Case Management Process

The Campus Support process begins when the Authorized Contact presents a problem or request that they were unable to address using the self-service options available on Campus Community (24/7 online portal). Campus Support utilizes an online case portal and phone support to assist Authorized Contacts.

1. The Authorized Contact submits a case via the Support Case Portal, detailing the issue, replication steps, priority level, and due date if it is time-sensitive.

> Note: For critical issues, the Authorized Contact should follow up with a phone call after submitting the case.

2. Campus Support will review the case and identify the issue type through troubleshooting and investigation.

3. Upon resolution, Campus Support provides a written explanation via the Support Case Portal and places the case in pending status for customer verification.

4. If resolved satisfactorily, the Authorized Contact should close the case.

5. If the Authorized Contact doesn't respond or close the case, Campus Support will attempt to reach them for 10 business days before closing the case.

> If the case is closed and unresolved, the Authorized Contact can reopen the case (within 60 days), providing additional details for further investigation.

6. All communications are recorded and tracked via the Support Case Portal. Authorized Contacts can communicate directly with the advisor assigned to their case.

7. All Authorized Contacts can access and comment on all cases for their district.

8. If there is an ongoing incident that may be impacting your district, a status notification banner in the Case Portal will provide information or further instructions.

Incident Reporting and Issue Qualification

At Infinite Campus, we are dedicated to ensuring that our products consistently meet the evolving needs of our valued customers. Through testing and replication, our Campus Support team assesses reported issues to ascertain whether they stem from an isolated incident or are indicative of a broader product defect.

Issues qualified as product defects are promptly escalated for triage and resolution, adhering to our established Service Level Agreement (SLA) timelines. Critical issues are swiftly addressed through fixes made available in Rx packs, while those with minor impacts are resolved and included in future updates.

To facilitate transparent tracking and seamless communication, all product defects are linked to a unique Product Development issue number and undergo a status change within our case management application, indicating assignment to the Development team.

Upon successful resolution of a product defect, Authorized Contacts are notified within the case via a note and a status change indicating availability in the next release. Product defect corrections are also documented in our Release Notes and published on Campus Community for each release.

Triage and Maintenance

An initial review of each issue is done to determine the potential for immediate and future customer impact. An impact assessment can include, but is not limited to, consideration of the following:

- Level of disruption to customer workflow
- Inability to perform daily functions
- Existence of a viable workaround
- Multiple schools/districts that are affected by the issue
- Multiple users are directly impacted

During the impact assessment review, each issue is thoroughly verified to determine its potential impact. Issues classified as critical, high-priority, or serious regressions in functionality are assigned the highest priority, with resolution efforts initiated immediately to ensure a swift response.

Escalation Guidelines

The escalation process is designed with transparency in mind, ensuring that customers are kept informed every step of the way. Our goal is to resolve requests without escalation whenever possible. Approximately 70% of cases are successfully resolved at the initial support level.

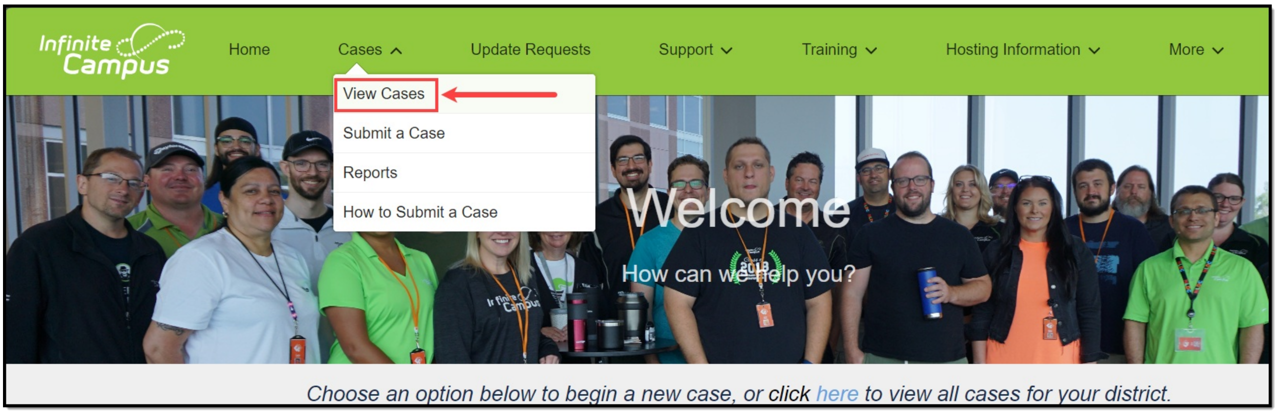
If escalation becomes necessary, our defined escalation path ensures swift resolution. Authorized Contacts will receive notification of the escalation via a note on the case.
Campus Support collaborates closely with Managed Services, Training, Process Consulting, Technical Services, and Development teams to address escalations accurately and promptly.

When addressing reported issues stemming from product defects, we follow a series of replication and testing steps to qualify the defect across multiple environments, ensuring a comprehensive understanding of the reported issue. Once confirmed as a defect, the case is associated with a development issue for monitoring and tracking resolution progress.

Upon fixing a product defect, Authorized Contacts are notified within the case via a note and a status change to "Available in Release." Email notifications of these changes are also sent to Authorized Contacts involved in the case, ensuring clear communication throughout the resolution process.

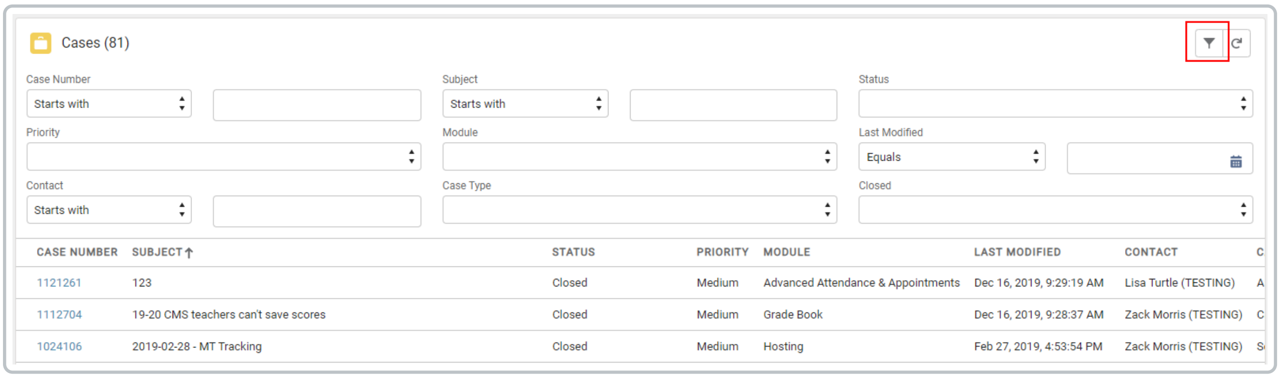
Case Search

The Support Portal provides Authorized 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.

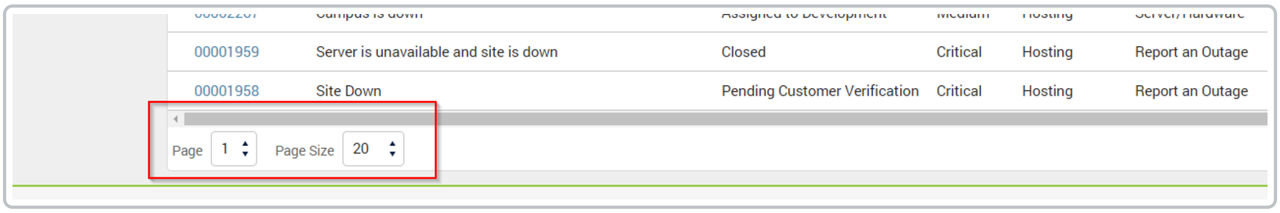
Option	Description

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.

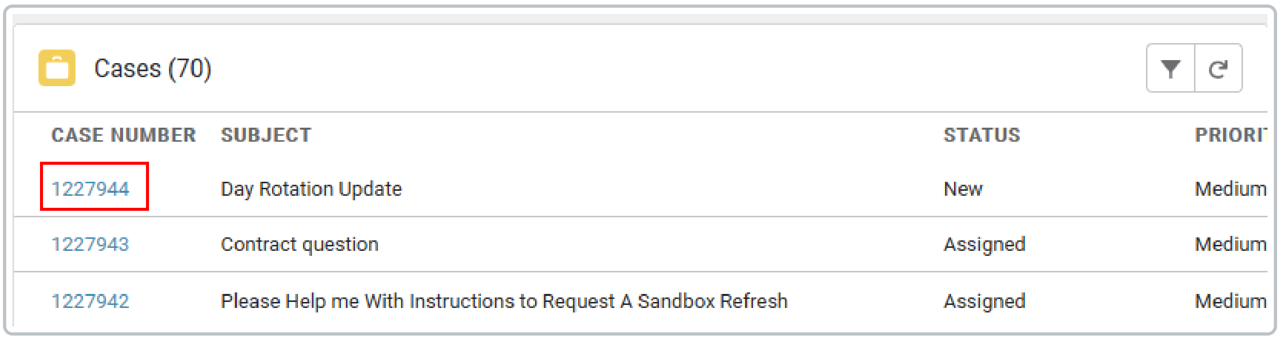
Search Results

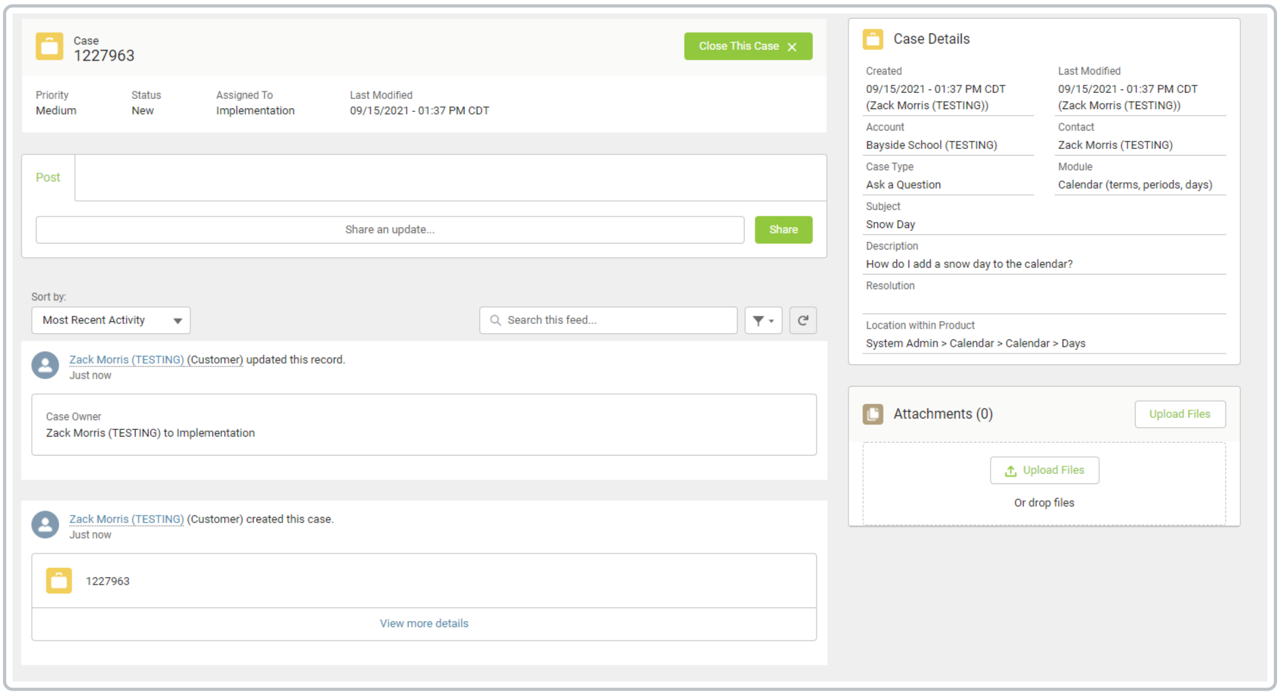
The number of Results returned displays at the top of the Cases window. The number of cases returned per page is automatically set to 20. This number can be changed by updating the Page Size value that displays at the bottom of the cases list. When this value is changed, the number of pages also changes.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



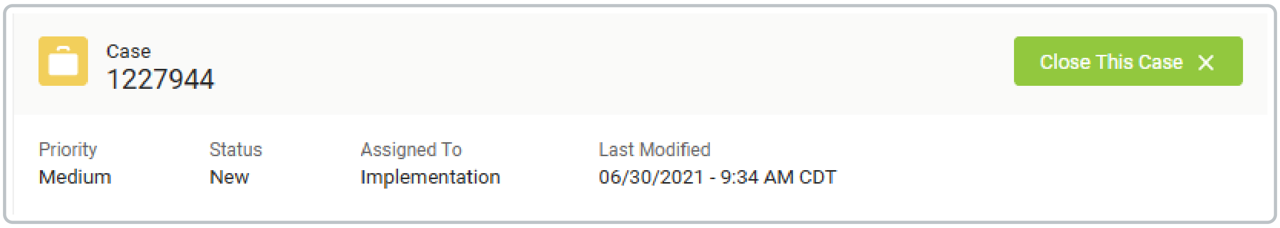
Viewing and Communicating on Cases

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



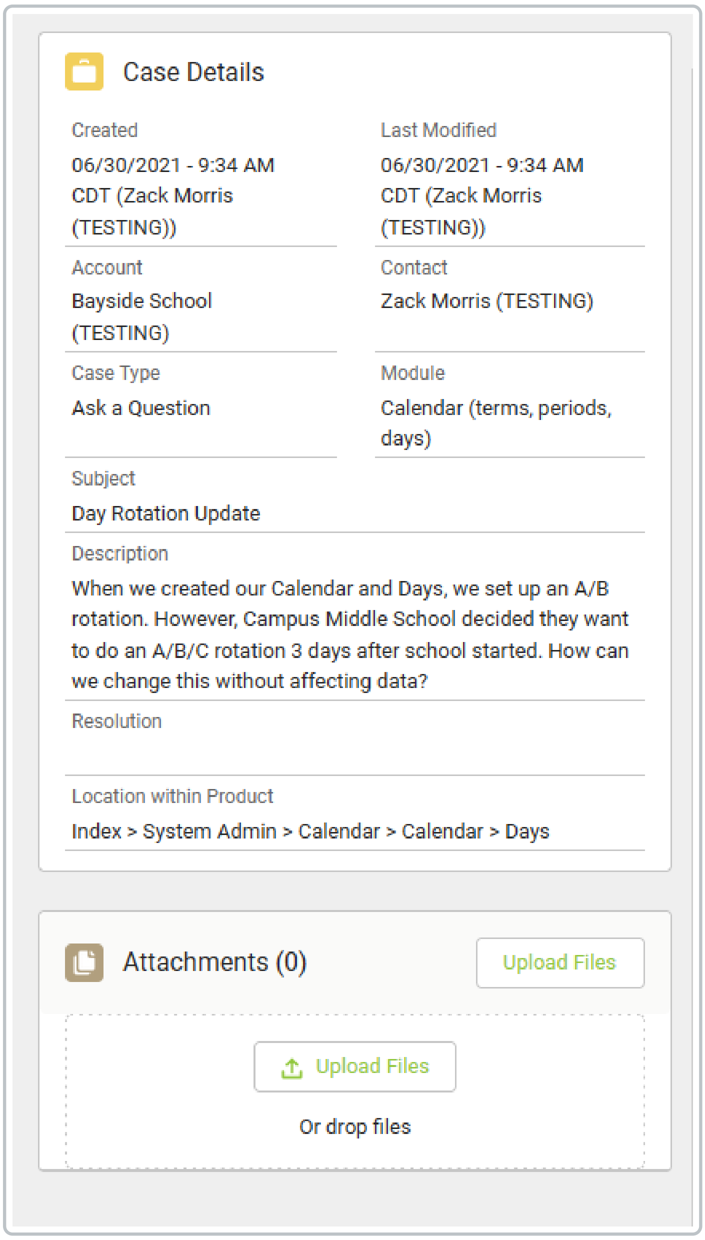


The top panel of a case displays important information including its Case Number, Priority, Status in its life cycle, who in Support the case is assigned to, and its last modified date. Cases may be closed (or re-opened) using the button at the top.

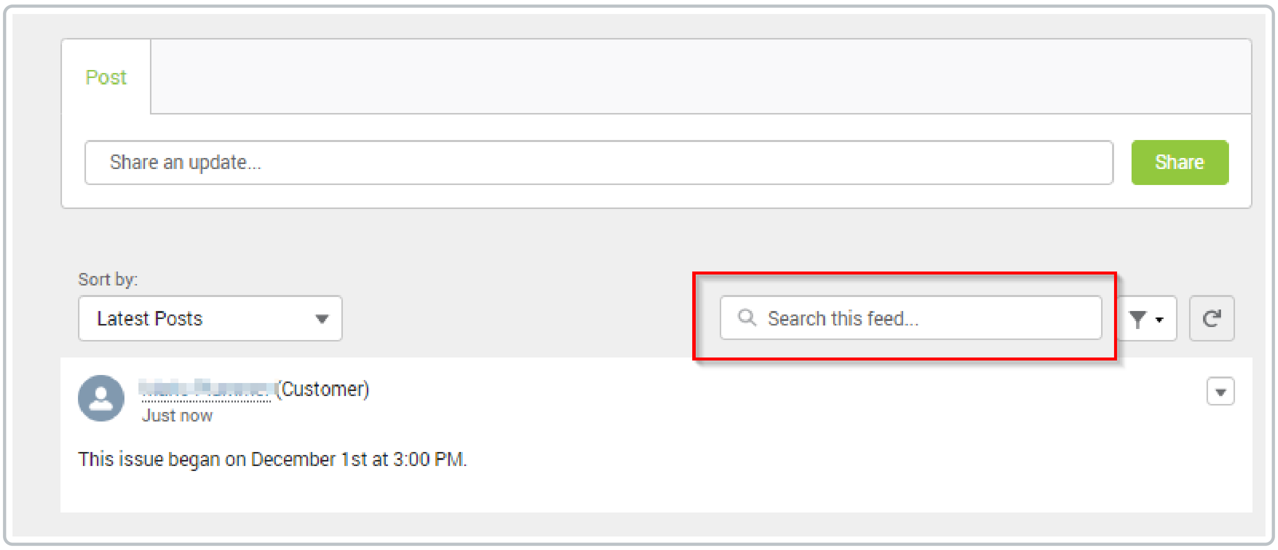


Case Details on the right side of the screen includes the information provided by the contact at the time of case creation, and/or case qualification information added by Support.

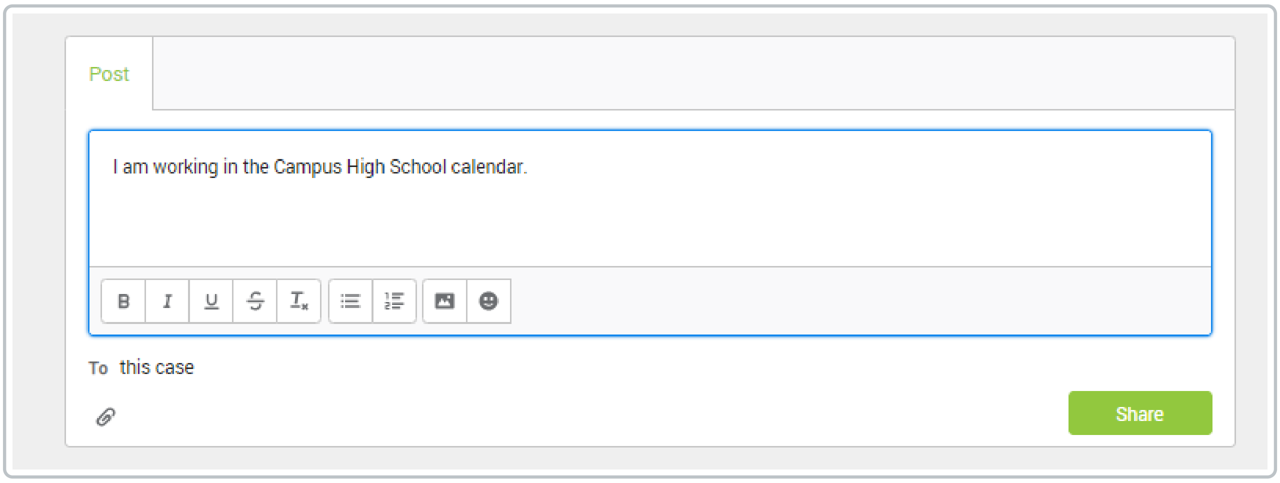
All attachments (added by the district or Campus) display in the Attachments area for easy access. Click on the text **Attachments** to expand the box and view additional details.



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.



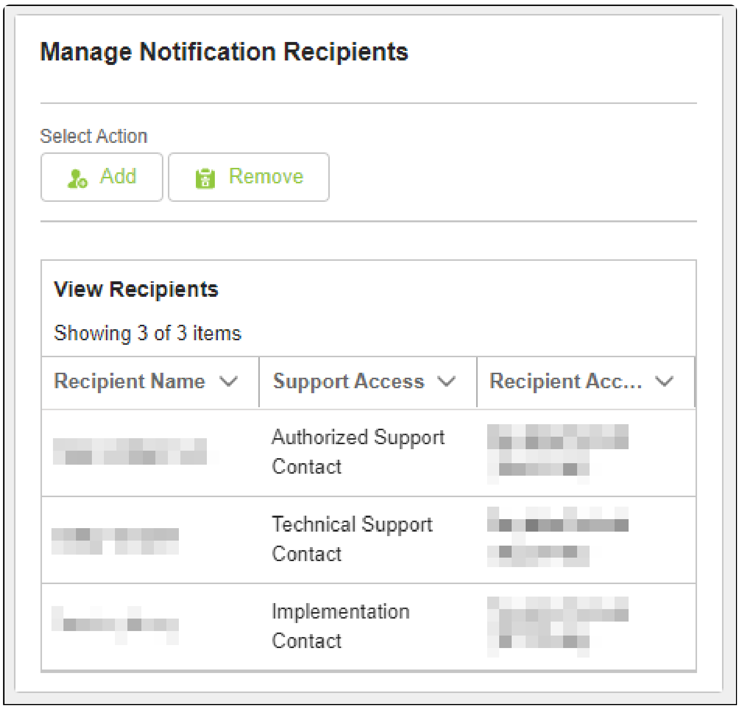
To add a Post to a case, click into the Post box that says "Share an update". An editor box will appear. Type your message into the editor and hit Share to submit. Note that you may format your text, add bullets or numbers to your steps, or add saved images directly into your Post. The paperclip icon 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 Authorized contacts (Support, 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

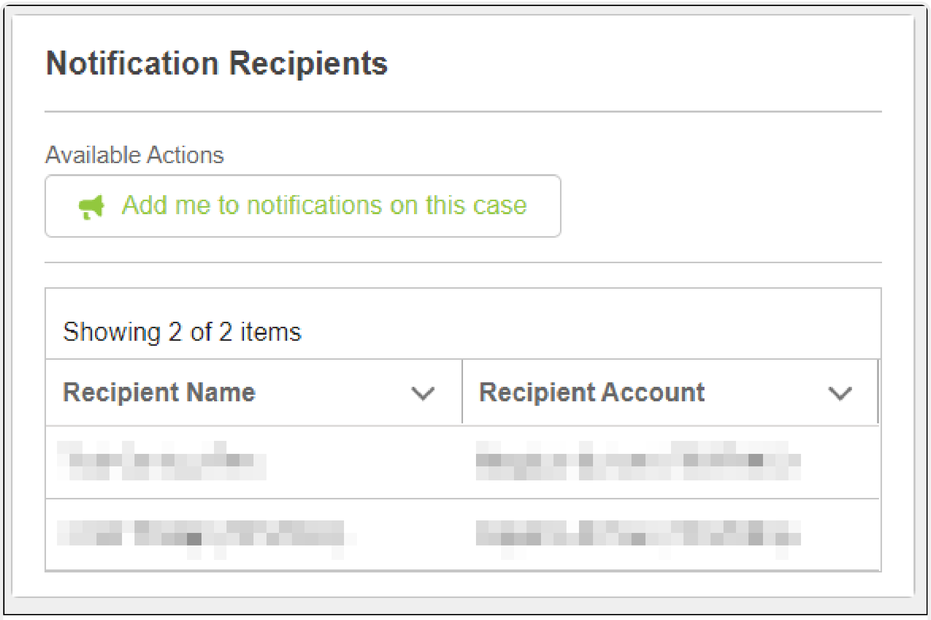
To add a Support Contact as a notification recipient:

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.