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I INTRODUCTION

The CAMMS Online Support Portal is an online helpdesk facility for reporting issues, submitting custom modifications, viewing FAQs, seeking clarification on business rules, updating your contact details and submitting enhancements/ suggestions. The portal is accessed via the CAMMS website which is integrated with CAMMS Customer Relationship Management (CRM) system.

Your portal will allow you to:

✓ Submit, view and monitor all requests online directly to our helpdesk!

✓ With a click of a button, track progress on your requests in real time and receive automatic updates by email!

✓ Timely and efficient lodgement of requests and issue; no more phone calls or hard to track emails!

✓ Access to CAMMS 24 hour Global Delivery Service Centre to increase our service to you!

CAMMS online Support Portal will be the desired method for clients to log and check status of all help desk requests (as opposed to phone and email). This has benefits of ensuring that all items are logged in a central location and can be easily referenced.



2 GETTING STARTED - LOGIN

Logging on to the online support portal

(1) Navigate to CAMMS website:

http://www.cammsgroup.com

- (2) Click on the 'My CAMMS' tab
- (3) Click on the 'Client Support Portal' button to go straight to the login page (as below)

3	CAM	MS					Search			search
Intelligent performance							L Client Login n Clien		t Support 🤛 Forums	
3	Solutions	Industries	Services	About Us	My CAMMS	Blog	Partners		Careers	Contact Us
ou are	here: Home + I	My CAMMS								
				Your acc	cess to			2	Client Login	
	organisational empo				owerment	2	n	Client Support Portal		
Мy	CAMMS								CAMMS Forums	
CAM CAM	MS is committe MS unparallele	ed to delivering o d products and s	utstanding clie ervices.	ent support to ensu	re that organisations ca	n maximise the benefits	of using			
he (CAMMS Client	Support Portal is	an online help	odesk facility for rep	oorting issues, submittin	g custom modifications,	viewing FAQs,		CAMMS Newslette	r Subscribe
he (CAMMS Client	Support Portal al	s, updating yo	-	nd submitting enhance	nents / suggestions.		Find out	recent news about u	s, our clients &
0	Submit view	and monitor all re	auests online	directly to CAMMS	helpdesk			from CA	VIMS	terry newsletter
With a click of a button, track progress on requests in real time and receive automatic updates by email										
0	Ensure timely	and efficient lodg	jement of requ	uests and issues - r	no more phone calls or	hard to track emails.		Email		



(4) Login to the online support portal by adding in your username and password.

Note: your username and password is set up by CAMMS and your username will determine which company you are from. It is recommended that the main champions for each CAMMS product is given access to the online support portal and that those champions log any issues that other staff within the organisation may raise.



3 MENU

The menu bar will take you into different sections of the online support portal.

	1	1	2 😭	3 🛃		4 💱	5 💌	6 🥥	
1	My Supp	ort	FAQ	Log a new Supp	port Case l	Jpdate my detail:	s Log Off	User Manual	
1.My Supp	ort	This	s is the l	nome page of	f your case	list which y	ou can filte	r out all your	cases
and vie Login a			in as the	e Company Ad	dmin: The	My Support	will detail A	ALL cases list	ed for
Login as a single user: The My Support will o created.			port will only	y detail case	es which YOU	have			
When you login you will log straight into the 'My Suppor				My Support	' home page	which			
	will give you the summary of all your cases. You may use the optional sea filters to filter out your list.					earch			
2.FAQ This area allows you to search any frequently asked functionality and answers. Please check this area first before logging queries				tionality ques	stions your				
		que	estion ma	ay have alread	dy been an	swered!			-



3.Log a new	Allows you to log new help desk cases.
Support Case	
4.Update my	Allows you to update your personal contact details (my details) or your
Details	company details. You will only have access to the company details if you login
	as the Company Admin. This area will keep all contact information up to date
	for when things change.
	When you login as the Company Admin, the 'My Details' are the details for
	the MAIN champion which mail out postal letters are sent to. All champions
	will receive mail out updates.
5.Log Off	Allows you to log out of the portal, back to the login screen.
6. User	You can download this manual within the portal by clicking on this link. Any
Manual	updates to the manual will be uploaded here.

-@

What is a case? All help desk queries (whether being an issue/ question/ infrastructure help or issue/ Deployment Service Requests/ enhancement or custom modification) are named as Cases.

4 MY SUPPORT

The 'my support' area details all of your cases.

-												
Support	AQ Log a	new Support Case	Update my deta	ils Log Off	Q User Manual							
nd Case												
Keyword !	Search:		?									
Case Num	ıber:	Status: Open		Stage: All		•						
Type:		Software P	roduct:	Category:								
All						•						
Jescriptic	on.				-							
Hint: Place a	a % symbol in front o	f search terms for in	proved search re	ults. eg. "%integ	ration" Find							
						Click Fi	nd to a p	plyfilters				
						L					Go to page 1	→ ▶ ▶
Status 🔺	Created Date	Person Case Numbe	Description				Stage	Туре	Software Product	Impact/SLA Severity	Desired Resolution Date	Client Delivery Date - Live
Open	11/09/2009 3:02 PM	Sally Hurst 32-1214	8 Improving 8 all the iten	rollover: ha	ave a 'select all' r	button to selec	t Investigation	Future Enhancement/Suggestion	Interplan	No SLA	31/12/2009	
Open	21/09/2009 1:01 PM	Sally Hurst 85-1235	8 Add paran	neter descrij	otions to parame	eter page	Estimation Development	Future Enhancement/Suggestion	Interplan	4 - No loss of service	30/09/2009	30/11/2009
Open	11/11/2009	Sally Hurst 32-1362	Having a v 8 PES assess	varning or r ment (in ar	nessage pop up ly phase) just re	when leaving minding them	Investigation	Future	PES	No SLA	28/02/2010	



SEARCH					
1.Keyword	Search for a key word across all text fields.				
Search					
2.Case	Search by case number				
Number					
3.Status	Search by case status, defaults to Open.				
4.Stage	Search by cases at a particular stage				
5.Туре	Search by the case type				
6.Software Product	Search by a particular CAMMS product				
7.Category	Search by the category				
8.Description	Search by the Case Description				

Use the % symbol at the start of your key word/s to do a wild card search and all items with that word will be displayed!

Click 'find' to apply the filters

The grid columns show quick information on the case/s. However you can drill down to show more details by clicking on either of the hyperlinked text: Case Number or Stage. Clicking on the column headings will allow you to sort the cases in ascending/ descending order.

When drilling down further to the case you will be shown more details (see image below)

Case Summary Associated Files	Associated Files to upload documents and screen			
Case Number: 32-12072	shots			
Created Date: 09/09/2009 2:08 PM			-	
Type: Issue	Category: Application	Software Product: Interplan	Version: 3.6	
Impact on Client/SLA:	Source: Self Service	Created By: Sally Hurst		
Description: Error when updating actions via home page quice Detailed Description: When updating my action via the home page i g	k update et an error.			Case Details
User: Sally Hurst				
Steps: Login, then select the 2 actions, click on	the quick update button and then get an error.			
This error happens everytime i try and update t	he actions.			
Desired Resolution Date: 10/09/2009	Estimated Client Deliver	/ Date:		
Case Solution:	Status: Open	Stage: Logged		
Closed Date:			-	
Close Case				

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Please refer to section 7 "Additional Case Details" for more details.

5 FAQs

Before logging any requests to CAMMS, please review FAQs as your question may have already been answered. The FAQ's area shows frequently asked questions which have been previously answered. The FAQ's are grouped in categories of CAMMS software questions, integration questions or question to do with Self Hosting. Click on the hyperlinked Reference ID to view the full answer.



SEARCH				
1.Question	Search for a key word that may be within the question			
2.Answer	Search for a key word that may be within the answer			
3.Area	Filter by Area. This is the area category which the FAQ's have been grouped in.			
	Software (FAQ within the software), Integration (FAQ within the integration			
	products), Self Hosting (FAQ around self hosting the products)			

Use the % symbol at the start of your key word/s to do a wild card search and all items with that word will be displayed!



6 LOG A NEW SUPPORT CASE

To create a new case, click on the log a new support case icon. This includes any case type (issue, UAT Release issue, custom modification, question/clarification, enhancement, infrastructure, Deployment Service Requests or data entry). All displayed fields are mandatory. Please be aware that once you have saved the details, you will not be able to edit these. If you make a mistake, you can close the case and create a new case or contact CAMMS Support. Details on how to close the case please refer to section 10 "Closing a case".

Wy Support FAQ Log Off	
Case Number 0-2564* Type:	^
-None- V.	
Detailed Description: Please provide a detailed description and include as much information as possible to assist in a timely response to your enquiry. Please are provide a detailed the some provide detailed steps of how you incurred the issue. Please also copy and pasts the "about" details from your CANN'S product which includes the full version number, database server, database and web server. You can upload a document/ file with screen shots and examples of the issue/ custom modification you require after you have clicked the Save and Submit button.	
Software Product: -None- * Version: * * * * * * * * * * * * * * * * * * *	E
Lategraph - None- None- None- None- None- None- None- None	
Desired Resolution Date: Enter in format DD/NN/YVYY	
Save and Submit	-

REQUIRED INFO	REQUIRED INFORMATION					
Case Number	Automatically entered, this is the unique number which references a case entered - this should be					
	provided in any correspo	provided in any correspondence to CAMMS.				
1.Туре	Nature of the Case					
	Issue	Fault in the system or report				
	UAT Release Issue	Fault/Issue which has come out of UAT testing on a version release in client test environment.				
		*only applies to Self -Hosted Clients when testing new upgrades or else within test environment checking.				
	Custom Modification	This is a proposed change to the software or reporting. These requests will have an estimated price prepared for them and go through the change request process. Estimation Development will come from the Customer care fund.				
	Question/ Clarification	Query regarding functionality – responses will come from the Customer Care fund.				



	Future enhancement/	How CAMMS can improve their products. These will be reviewed at				
	suggestion	least guarterly when reviewing development plan for CAMMS				
		products. However CAMMS cannot guarantee that it will be				
		incorporated into the software.				
	Infrastructure	Issues with network/servers / databases				
	initiastructure	Assistance may link with a support fee or come from the Customer				
		Care fund				
	Destaurant Consist	Care fund.				
	Deproyment Service	Product Opgrades / Live Migrations / Product Installations &				
	Request	Configurations / Label Replacements				
		Assistance may link with a support fee or come from the Customer				
		Care fund.				
	Data Entry	Request for assistance with data entry – a quote will be prepared or				
		else work undertaken will come from your Customer Care fund.				
2.Short	Brief description on the Ca	description on the Case.				
Description	NOTE: Each issue/modification/request/etc must be logged separately as an individual case. One					
	request/issue per case nu	mber. For Example:				
	✓ Unable to link KPIs in Self-Assessment phase					
	×Pes Bug					
3.Detailed	Provide more details on the areas which need to be rectified /changed. It is recommended you copy					
Description	and paste the text in "about" page in interplan [®] to answer some of these questions:					
	NOTE: All details relevant	to the Case must be added into this section.				
	For example: Issue - wh	at database?/what server?/what instance (live/demo/training)?/where				
	the issue lies?/how it oc	curred (step by step?)/does it happen all the time or is it a once off?/				
	what user login was used	?) Giving as much detail as possible for the developers to replicate it.				
4.Software	Select the software product which is relevant for the Case (e.g. Interplan®/ PES/ Risk Manager/IPM)					
Product						
5.Version	Current Version number of	of the product. Please see the 'about' area of interplan® to find this out:				
	👫 Home 🔞 Help 👷	Favourites 😝 Logout () About .				
	Note: Not all products ba	we an about button at this stage but plans are to have all products with a				
	hote: Not all products have an about button at this stage but plans are to have all products with a					
	button for this. If you are in doubt of the version, please put in the environment name					
C Catagony						
o.category		which the case fies (e.g application, report, integration)				
7.impact/SLA	Consequence of Issue on (
Severity:	Selection	Description				
	1. Complete Loss of	Work cannot reasonably continue on your live/ production site. The				



	Service	operation is mission critical to the business and the situation is an			
		emergency. e.g. cannot enter site/ loss of data			
	2.Severe Loss of Service	Use of software possible, however certain areas are not working e.g.			
		report not running			
	3.Minor Loss of Service	Inconvenience			
		A work around is available			
		Urgent advice required			
	4.No Loss of service	Minor error, incorrect behaviour, documentation error, request for			
		advice/ guidance that doesn't materially impede the operation of a			
		system. E.g. issue with label replacements			
		Formatting of reports/screens			
	No SLA	Not Applicable. E.g. for Paid Requests, enhancements, deployment			
		requests, data entry, etc			
8.Desired	Enter in XX/XX/XXXX forma	at, the desired date which you require the case to be resolved by. This will			
Resolution	depend on Severity and ur	gency.			
Date	CAMMS cannot guarantee that this due date will be met however it will help with prioritizing and				
	scheduling.				
9.Save and	Click the Save and Submit	button to save the case.			
Submit					

Once a case is created and submitted, an automatic email will be sent to our CAMMS support and the case will be added into our CRM system to be looked at and acted upon as necessary.

When the case is looked at and the type is confirmed, an automatic email will be sent back to you confirming that it has been received and is being investigated.

Examples of Case Types:

Туре	Examples	
lssue	Software errors/system not working the way it should/unusual things happening in the	
	database/report not running/report displaying incorrect data	
UAT Release Issue	Once new version is put into your TEST environment – any 'Issues' that are found (as	
	above description for issue type).	
Custom Modification	New changes to the software/changes to a report/ development of a new	
(requires a fee for	report/changes to integration	
development)		
	Changes will go through an estimation process, followed by a specification and revised	



	quotation.
Question/Clarification	Eunctionality questions/business rules clarifications
	Time spent on answering these queries will come out of the customer care fund
Infrastructure	Issues with Infrastructure (hardware and internal software) / new databases – training
	nurnoses/demo
	Assistance may link with a support fee or come from the Customer Care fund.
Deployment Service	New Upgrades required/Label Replacements/installation assistance
Request	Assistance may link with a support fee or come from the Customer Care fund
Data Entry (requires a	Data Entry of plans within the software
fee for assistance)	
	A quotation will be prepared.
Enhancement	Software enhancements/reporting enhancements/suggestions/ideas

Associated Files

Some cases may require a screen shot, images or a large amount of text which can contribute to the explanation of the case. Any files relevant that CAMMS upload will also be shown within this area. For example, for a Custom Modification CAMMS may upload the estimation or specification to this area. Or for an issue fix CAMMS may upload the script that will fix it on a self-hosted client's site. The client will be advised when a document is uploaded through an automatic email on resolution. In turn, the system also advises CAMMS if a client uploads a document, so you don't have to inform CAMMS separately. The system will do a time-stamp on when it was uploaded and have a description available to describe what the document shows.

Maximum File Size for Upload: 8000KB





Examples of documents which may be uploaded based on case types:

Туре	From client on Initial creation	From CAMMS on resolution	
lssue	Software error screen shots/	Associated documents explaining the	
	Document explaining issue	resolution/ Scripts uploaded to fix issue /	
		URL for download of a new version to fix	
		issue	
UAT Release Issue	During UAT period in TEST	Associated documents explaining the	
	Environment - Software error screen	resolution/ Scripts uploaded to fix issue /	
	shots/Document explaining issue	URL for download of a new version to fix	
		issue	
Custom Modification	Mock-up of changes required/	The final estimations for approval/ the	
(requires a fee for	documented business rules on	final specifications for approval/ Updates	
development)	changes required / Signed approvals	to estimations and specifications	
	/ Purchase orders attached.	ttached.	
Question/Clarification	documents for further explanation of Documents for further explanation of		
	the question	answer	
Infrastructure	Documents required for	Label replacements scripts uploaded to	
	infrastructure assistance/ documents	run on databases/documents explaining	
	further explaining the infrastructure	the infrastructure completed.	
	assistance		
Deployment Service	Documents required for Deployment	Scripts uploaded or additional	
Request	assistance/ documents further	documentation to support the service	
	explaining the assistance or server	request.	
	requirements or details.		
Data Entry (requires a	Documents supporting the data	Documents relating to the completion of	
fee for assistance)	entry required	the data entry	
Enhancement	Documents which further explain the	Documents explaining how it has been	
	enhancement.	incorporated into the new version.	



Managing SLA's

In line with our Service Level Agreement contracts, CAMMS is under obligation to provide all clients with the required support services that the client is entitled to which is covered in your licence. This is the support for the investigation and fix of all 'issues/defects' which are found within CAMMS software, prioritised by a priority level. The below table will detail CAMMS priority SLA levels and the target response and target resolution time frames for these.

Priority Level	Description	Target Response Time	Target Resolution Time
1 - Complete Loss of	Work cannot reasonably	4 working hours	1 Day
Service	continue on your live/		
	production site. The		
	operation is mission		
	critical to the business		
	and the situation is an		
	emergency.e.g. cannot		
	enter site, Data		
	corrupted, a critical		
	function is not available		
	or producing incorrect		
	result, system causing		
	unacceptable or		
	indefinite delays for		
	resources or response,		
	system crashes, and		
	crashes repeatedly after		
	restart attempts		
2 - Severe Loss of	The situation causes a	6 working hours	2 Days
Service	severe loss of service.		
	No acceptable work-		
	around is available;		
	however, operation can		
	continue in a restricted		
	fashion. Use of software		
	possible, however		
	certain areas are not		
	working e.g. report not		
	running		
3 - Minor Loss of Service	The situation causes	8 working hours	5 Days
	minor loss of service.		
	The impact is an		
	inconvenience, which		
	may require a work-		
	around to restore		
	functionality, or urgent		
	advice is requested.		



4 - No Loss of service	The situation causes no loss of service. The request is considered a minor error, incorrect behaviour, documentation change or error, or request for advice and guidance that does not materially impede the operation of a system. E.g. issue with label replacements, formatting of reports/ screens	16 working hours	Future release
5 - No SLA	Not Applicable. E.g. for Paid Requests, enhancements	24 working hours	Future release



7 ADDITIONAL CASE DETAILS

During the case process, additional fields are shown which will help with showing progress and more details of a case. When the client clicks on the hyperlink via the "my support" page (refer to section 4 "My Support") the following additional fields are displayed.

i 📁 👷 🛛 🛃 💕 😣			
My Support FAQ Log a new Support Case Update my details Log Off			
Case Summary Associated Files			
Case Summary			
Case Number: 32-12148	Person: Sally Hurst 🛛 🍾 08 82125188	Opened: 11/09/2009 2:55 PM	Updated Date: 03/12/2012 1:08 PM
Type: Future Enhancement/Suggestion	Category: Application	Software Product: Interplan	Version: 3.6
Impact/SLA Severity: No SLA			
Description: Improving rolloveri have a 'select all' button to select all the items to rollover			
Detailed Description: Having a select all button on the rollover stage 1 screen would be beneficial so that users dont have to log through and tick all the boxes.			
Around 90% of users copy everything over so we should have an easier way. Also, i have had a lot of clients stuff up the rollover	as they forget or miss items they forgot to select. A select all button would for	this.	
Desired Resolution Date: 31/12/2009	Client Delivery Date - Live:		
Solution:	Status: Open	Stage: Investigation	
Tracked Notes/Correspondence (Please do not delete any correspondance):		2	
Add note			
Close Case			

FIELD	DESCRIPTION
1. Person	This is the person who has created the case. This is the person who CAMMS
	support staff will contact in any correspondence with the case.
2.Opened	Automatically displays the date and current time for which you created the
	case/was opened.
3. Updated Date	This is the date which will show when the case was last updated (either by
	CAMMS staff or the client).
4. Client Delivery Date -	Entered by the developer stating when they expect to complete the Case based
Live	on type and work load. This date is fixed once added but may change if the Case
	takes longer than expected to complete. The client is notified of the reason for
	change of due date and is made in liaison with the Client manager/ client.
5.Solution	This is the solution for the Client issue. This is normally added on completion of
	the Case from the developer who fixed it.
6.Stage	Stated as "Logged" at the initial stage when the Case is entered. Will change as
	the Case is progressed until completion. (see the stage process for more
	information)
7.Status	Stated as "Open" and does not change until Case is completed. Once Case is
	closed, it will appear as "Closed"



8 CASE STAGE PROGRESS

How to follow the Stage progress of a case and what it means?

Each case type has a stage in the progress of the case, and they all have different meanings as to where it is at. Below find the Case type and its Stages and how to read what that stage means. Also, it will detail at what stage you will receive an email to notify you on the progress.

Stage	Description
Type: Issue / UAT Release Issue	
Logged	The case has just been created and confirmed.
	An email will be sent to client advising it has been received by CAMMS
Investigation	The case is currently being investigated to see what the issue is/investigating how to fix it.
Development	The case is in development to being resolved. Involved is the fix/QA process. An estimated
	due date will be established and can be viewed within the Portal Case area for the client to
	view.
	An email will be sent to client advising the Estimated Resolution date.
Resolved	The issue has been resolved on the clients database, and is awaiting client sign off on the
	resolution. The issue may also be resolved within a new version release which the client
	will need to upgrade to have it resolved (Self Hosted), or released to hosted by CAMMS.
	igsquiring An email will be sent to client advising that the issue has been resolved.
Closed	The client has reviewed the fix and is happy that it is fixed (The issue may be closed by the
	client themselves within the support portal by clicking the 'close' button). The case is
	closed and requires no more progress.
	ightarrow An email will be sent to client with an optional Survey to fill out for feedback on the
	case progress.

Custom Modification	
Logged	The case has just been created and confirmed.
	igsqcap An email will be sent to client advising it has been received by CAMMS
Investigation	The case estimation is currently being developed.
Estimation	The estimation has been developed and sent to the client for approval.
Development	igsquire An email will be sent to client by the support person managing your case - giving the
	estimation.
Specification	The estimation has been approved and it is now in specification development.
Development	
Client notification -	The Specification has been completed and the specification and quote (if revised) has been



Spec and Quote sent	sent to the client for approval.
	$\widehat{}$ An email will be sent to client advising that the specification and quote has been
	completed and sent for final approval.
Development	The specification and quote has been approved and assigned to the change request team
	leader for scheduling and development. This includes the process of scheduling,
	development and QA.
	You can upload signed estimations, specifications and purchase orders to the case via
	the online support portal 'associated files area'. This will send an automatic email to
	CAMMS.
Release Management	The modification has been completed. It is now ready to be released within a version
	release.
Client notification -	The modification has been completed and has been released to the client for review.
completion	CAMMS awaits feedback and sign off.
	igsquire An email will be sent to client notifying then that the modification has been released.
Closed	The client is happy with the modification and is ready to be invoiced. (The request may be
	closed by the client themselves within the support portal by clicking the 'close' button).
	The case is closed and requires no more progress.

Question/Clarification	
Logged	The case has just been created and confirmed.
	An email will be sent to client advising it has been received by CAMMS
Investigation	The case has been allocated for investigation on the answer. The time spent on
	investigation will be tracked against the client's Customer Care fees.
Resolved	The question/clarification has been answered and the client has been notified of the
	answer.
	ightarrow An email will be sent to client notifying that the question has been answered with the
	answer within email.
Closed	The client is satisfied with the answer. (The case may be closed by the client themselves
	within the support portal by clicking the 'close' button). The case is closed and requires no
	more progress.

Infrastructure / Deployment Service Request	
Logged	The case has just been created and confirmed.
	igsquire An email will be sent to client advising it has been received by CAMMS
Troubleshooting	The case has been allocated for investigation on the work that needs to be done.

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Development	The case has been allocated and is in development.
Resolved	The infrastructure has been delivered to client and waiting sign off by the client.
	An email will be sent to client notifying that the infrastructure work has been
	completed/ resolved.
Closed	The client is satisfied with the development. (The case may be closed by the client
	themselves within the support portal by clicking the 'close' button). The case is closed and
	requires no more progress.

Data Entry	
Logged	The case has just been created and confirmed.
	$\overset{\frown}{=}$ An email will be sent to client advising it has been received by CAMMS
Development	The Data Entry estimation has been developed and sent to the client and it is in
	Development.
Resolved	The Data Entry has been completed and delivered to the client
	$\widehat{}$ An email will be sent to client advising it has been received by CAMMS
Closed	The client is satisfied with the development. (The case may be closed by the client
	themselves within the support portal by clicking the 'close' button). The case is closed and
	requires no more progress.

Enhancement/Suggest	ion
Logged	The case has just been created and confirmed. The enhancement is sitting on the list and
	awaiting approval by management.
	An email will be sent to client advising it has been received by CAMMS
Closed	The Enhancement has been incorporated into a version release and has been closed.
	An email will be sent to client advising that their enhancement has been incorporated
	into a new version.







9 ADDING NOTES/CORRESPONDENCE TO A CASE

Clients are able to write a communication note to CAMMS on a case by adding in a correspondence note within the portal. A correspondence note can be anything from verification from the Clients side, or a note to send it back to investigation if a case has been put in a particular stage which it should not be in. For example, if a case is resolved, you may need to write a note back to CAMMS advising that it actually is not resolved and for what reason.

The reason for the notes field is so that a client can respond to a case progress without having to email CAMMS.

To add a note, search for your case within the home page and click on the hyperlink to view more details on the case:

Case Summary			
Case Number: 0-13198	Created Date: 14/10/2009 10:06 AM	Person: Sally Hurst 🔏 8333 2888	Updated Date: 14/10/2009 10:06 AM
Type: Issue Impact/SLA Severity: 3 Minor loss of service	Category: Application	Software Product: Interplan	Version: 3.6
Description: Issue with KPI Graphs			
Detailed Description: KPI Graphs not displaying the correct figure for KPI "% number of duties configured".			
Desired Resolution Date: 17/10/2009	Estimated Client Delivery Date:		
Solution:	Status: Open	Stage: Logged	
Tracked Notes/Correspondence (Please do not delete any correspondance):	Click 'Add	note' to a	war c bha
Add note	correspondence	e/note for CAM	IMS.
Close Case			

When typing in a note, we recommend that you add a date and your name so we know who and when the note was written. CAMMS will also do the same if we respond within the notes field. Please also do not delete any notes in there. This is just so we can track when notes were put in, as well as keep a history.

Tracked Notes/Correspondence (Please do not delete any co	rrespondance):
14/10/2009 Sally - Please re-check the KPI within the report "Annual KPIs Report"	Type in a note and click save. Please do not delete any notes already in the field, so we can keep these for archive purposes.
Save	

An email is sent straight to CAMMS whenever a note is added to the field by a client.



10CLOSING A CASE

The client is able to close the case at any stage of the progress, as well as CAMMS. Once a case is resolved and verified that it is resolved, the client can close the case themselves without having to contact CAMMS. CAMMS will only close a case when the client is 100% happy with the delivery of the request/fix of the issue. To close a case click on the 'close case' button on the case details page – a confirmation message will appear to confirm.

Closing a case means action is no longer required on this case. Some examples this may occur is:

- the case has been resolved/Completed
- the case was added by mistake
- the case is cancelled, no longer required

To re-open the case again, a new case will need to be developed, unless you contact CAMMS to reopen internally.

ise Summary			
Case Number: 32-12072			
Created Date: 19/09/2009 2:08 PM			
Type: ssue	Category: Application	Software Product: Interplan	Version: 3.6
Impact on Client/SLA:	Source: Self Service	Created By: Sally Hurst	
Description: Trror when updating actions via home page quick update	2		
Detailed Description: When updating my action via the home page i get an en	or.		
Jser: Sally Hurst			
teps: Login, then select the 2 actions, click on the quid	update button and then get an error.		
his error happens everytime i try and update the action	ns.		
Desired Resolution Date: 10/09/2009	Estimated Client Delivery	Date:	
Case Solution:	Status: Open	Stage: Logged	
Closed Date:			

Once you click on the close case button you will be asked to confirm that you wish to close the case. Click 'Confirm' to proceed or 'cancel' to cancel the close.





I I UPDATE MY DETAILS

The 'update my details' area allows you to update your personal and company contact details as well as allowing you to change your login password to the support portal. Only if you login as the company admin will you have access to the Company Details and allow you to edit. Otherwise you can login as your individual personal username which you can update your personal individual details. By clicking the 'change' button it will allow you to edit these details which will update the CAMMS CRM contact information for you.



This page allows you to change your Name, Title, Direct Phone Number, Email, Postal Address and categories for particular contact mail outs (Champions, CEOs, Corporate Planners, HR, IT Support, Performance Management and Risk).

12LOG OFF

To log out of the Portal, click the 'Log Off' button which will take you back to the login page.





I 3 SUMMARY

The CAMMS team are committed to delivering exceptional client service; if you require further information in relation to your case, please contact CAMMS help desk by emailing support@cammsgroup.com. If you are not satisfied with the level of service you receive at any stage of this process or feel the need to escalate matters, please escalate in the following order (see escalation diagram on the next page):





26 September 2014



Intelligent performance

Visit our website to locate an office near you to organise a demonstration today.

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