

Customer Reporting System Training Guide

The following training guide is a guide for the Customer Reporting System.



Notes:



Introduction

- How to use the Customer Reporting System

Introduction

The new Customer Reporting System will allow a MDS customer to enter a new request, update an existing request, and inquire about the status of any open and closed requests.

Notes:



Agenda

- Request Entry
- Open Requests
 - Viewing
 - Updating
- Inquiry
- Completed Requests
- Logging Out

Agenda

This agenda lists all areas covered. This guide covers all menu items in the Customer Reporting System.

Notes:



Vocabulary Page 1

- Glossary of terms
- Severity
- Request Status

Customer Reporting System Vocabulary

Severity

Used when reporting problems. The severity levels are listed:

Low

Medium

High

Down System

Emergency

Request Status

The current job status. Each request is initially placed in open and received status. As the request is processed, the status code will be updated. The request will flow through the following statuses:

Received – Received by The Systems House, and assigned to a technician or programmer. This is the initial status when the customer enters the request.

Manager – In Manager review. Once opened by The Systems House, the request is reviewed, and is either assigned to a support technician, or referred to programming for quotation or programming. Corresponding comments may be entered for the request.

Note: Comments once entered cannot be modified. Additional comments can be appended so that a history is available. A date is appended, by the system, to each comment.

Support - Has been reviewed by The Systems House, and is in Support for resolution.

Duplicate – Duplicate request, request was previously submitted, the request is closed.

Removed – Request cancelled.

Notes:



Vocabulary Page 2

■ Request Status (continued)

Request Status (Continued)

Error Required User Instruction – The problem has been determined to be user error, the request is closed.

Information Pending – Additional information has been requested from the customer.

Quoted – If a quote is required, the TSH manager/analyst prepares the quote, and e-mails or faxes the quote to the customer. The request awaits customer approval.

Approved by User – Now ready for programming. Once approval is received from the customer, the request is placed in programming. The estimated date of completion is entered.

Declined – Declined, by the customer, after the quote was submitted to the customer.

Programming – In programming, estimated completion date is shown.

User Testing – User testing, pending.

Completed – Request completed with applicable changes installed. Request is then closed. When the request is completed by either programming or support, the nature of resolution (or comments), person completing the task, and date completed are added to the file.

Notes:



The Systems House, Inc.

Customer Reporting System

Login
Password

You must login to be able to access our Customer Reporting System.
If you do not have a login then please contact custserv@tshinc.com

Forgot your password? Email us custserv@tshinc.com

Phone (973) 777-8050 Fax (973) 777-3063



NOTE: This Site works best with Microsoft Internet Explorer 5.0 or greater.

To download the latest version of IE5, please go to Microsoft.com

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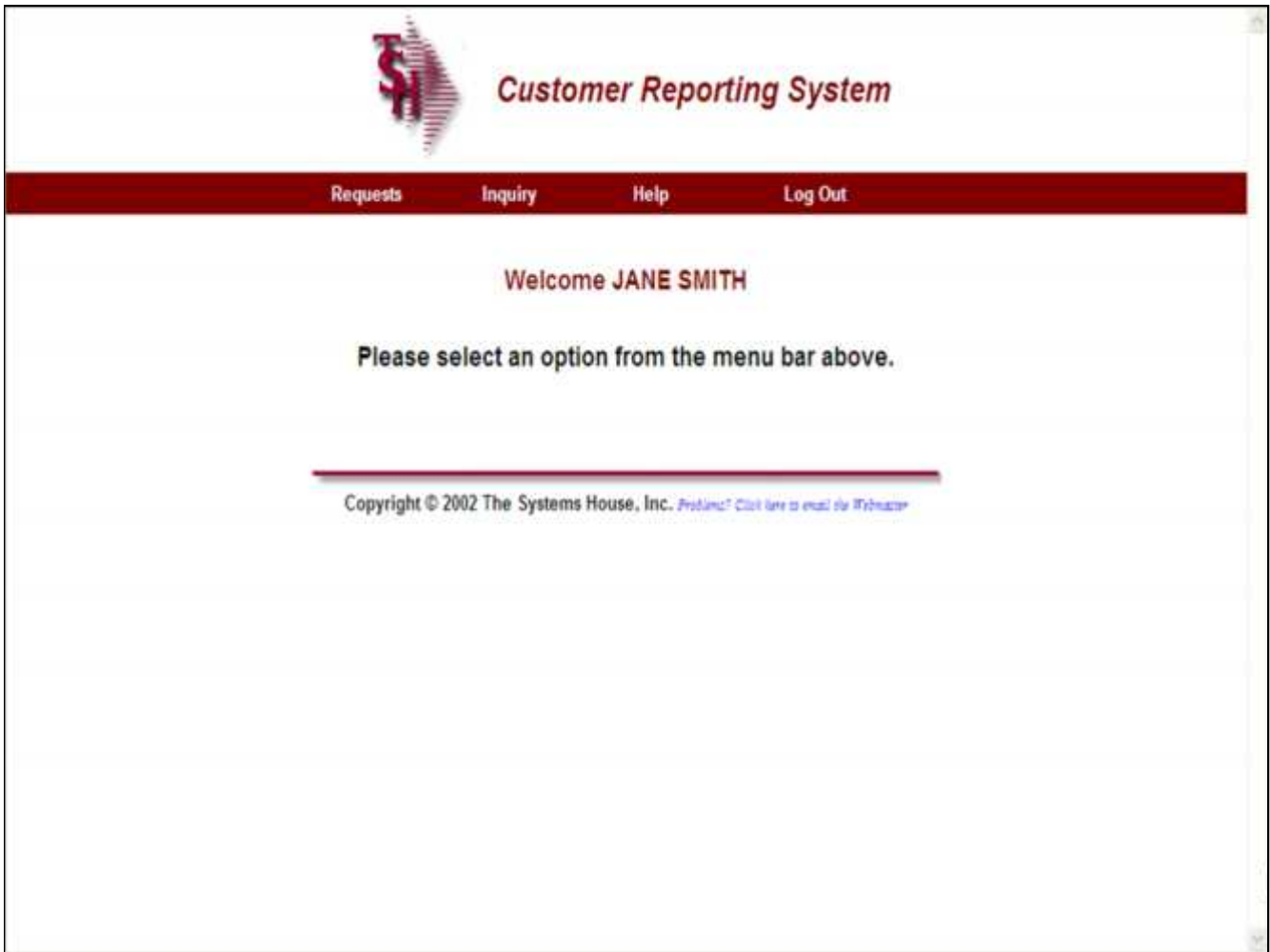
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Login Screen

The Customer Reporting System Log-on screen can be accessed at: <http://cyrixnt2.tshnj.com/>

The user will logon with the supplied login and password from The Systems House. The login and password are not case sensitive.

Notes:



Main Menu

Once the user is logged in, the Customer Reporting System main menu is displayed. From here the operator is able to go to the Requests screen, the Inquiry screen, or Logout.

Notes:



Customer Reporting System - Entry

Requests Inquiry Help Log Out

Please fill in Request Form below :

Required information is **highlighted**.

Request# 000214 **Entry Date** 08/28/02 **Open**

Customer	LEESAR HEALTH TRUST	
Contact	JANE SMITH	
Phone	973-777-8050	Ext. 123
FAX#	973-777-1483	
Email	jane@tshinc.com	
Mod/Problem	<input type="radio"/> Mod <input checked="" type="radio"/> Problem	
Severity	Low	
Status	Received	
Quote Required	<input checked="" type="radio"/> No <input type="radio"/> Yes	
Customer Priority		
Date Required	8/28/2002	
Department	PURCHASING	
Menu Path	7.2	
System Area	Purchasing	

Description of Problem:

Trying to maintain a purchase order and the system is saying that it is locked. The purchase order number is 01123456.

Requests

Request Entry Screen Page 1

The user can access this screen by clicking on the **REQUESTS** field, followed by clicking on the drop down box labeled: **ENTER A NEW REQUEST**. Required information is highlighted in red.

The request number, entry date, status, and the customer's name are displayed on the screen and cannot be modified.

The user will also see their information displayed. The user can change any information here that is incorrect, which will change the user information that is stored in TSH Inc's. database.

Contact Information

Contact – The user's name.

Phone & Ext – The user's current phone number and extension.

Fax# - The user's current fax number.

Email – The user's current email address.

Notes:



Customer Reporting System - Entry

Requests Inquiry Help Log Out

Please fill in Request Form below :

Required information is **highlighted**.

Request# 000214 **Entry Date** 08/28/02 **Open**

Customer	LEESAR HEALTH TRUST	
Contact	JANE SMITH	
Phone	973-777-8050	Ext. 123
FAX#	973-777-1483	
Email	jane@tshinc.com	
Mod/Problem	<input type="radio"/> Mod <input checked="" type="radio"/> Problem	
Severity	Low	
Status	Received	
Quote Required	<input checked="" type="radio"/> No <input type="radio"/> Yes	
Customer Priority		
Date Required	8/28/2002	
Department	PURCHASING	
Menu Path	7,2	
System Area	Purchasing	

Description of Problem:

Trying to maintain a purchase order and the system is saying that it is locked. The purchase order number is 01123456.

Request Entry Screen Page 2

Additional Entry Information

Mod/Problem – Click on the Mod radio button if this is a modification request, or click on the Problem radio button if you are reporting a problem. This is a required field.

Severity – The severity of the problem: Low, Medium, High, Down System, Emergency. Used for problems only. This is a required field.

Status – The requests current status is displayed.

Quote Required – If a quote is required, click on the Yes radio button, otherwise the default is set to No. This is for modifications only. This is a required field.

Customer Priority – This is a free form field to be entered by customer, for modifications.

Date Required – The date that assistance or modification is required. The user can click on the calendar icon and choose the date or manually type in the date. This is a required field.

Department – If departments already exist for the customer, a drop down box with a list of departments to choose from will be displayed. Otherwise, it is a free form field.

Menu Path – The numeric menu path to assist with the request. For example, Purchasing Maintenance would be 7,2.

System Area – Drop down list. The user is able to choose from the following fields: Accounts Payable, Accounts Receivable, EDI, File Maintenance, General Ledger, Inquiries, Inventory, Order Entry, Order Maintenance, Purchasing, Reports, Sales Analysis, Upload Data, or Web Site.

Notes:

No Yes
Quote Required
Customer Priority
Date Required 8/28/2002
Department PURCHASING
Menu Path 7.2
System Area Purchasing

Description of Problem:

Trying to maintain a purchase order and the system is saying that it is locked. The purchase order number is 01123456.

Special Instructions:

Comments:

Request Entry Screen Page 3

Additional Entry Information

Description of Problem – Type in a description of the problem or modification being requested. This field is required.

Special Instructions – The user can type in any special instructions in this field. This is an optional field.

Comments – Any comments can be entered here. **Note:** Once comments are entered (and submitted) they cannot be modified. Additional comments will be appended so that a history is available. A date is appended by the system to each comment.

To send the request click on the **SUBMIT** icon. To reset all fields, click on the **RESET** icon. To return to the main menu, click on the **RETURN TO OPEN REQUESTS**.

The user will then be emailed a copy of their request.

Notes:



Customer Reporting System - Update

Requests Inquiry Help Log Out

Please fill in Request Form below :

Required information is **highlighted**.

Request# 000214 **Entry Date** 08/28/02 **Updated** 08/28/02 **Open**

Customer LEESAR HEALTH TRUST
Contact JANE SMITH
Phone 973-777-8050 **Ext.** 123
FAX# 973-777-1483
Email jane@tshinc.com
Mod/Problem Mod Problem
Severity Low
Status Support
Quote Required No Yes
Customer Priority
Date Required 08/28/02
Department PURCHASING
Menu Path 7.2
System Area Purchasing
Date Promised
Assigned To 100178

Description of Problem:

Open Requests Screen Page 1

If the user is a Customer Admin, then they will be able to view and update all the open requests for their company. A regular user is only able to view and update their own open requests. Once the user clicks on the request, it is displayed on the screen.

The operator can update any field that is not grayed out.

On this screen the operator can view the employee number that the Request was assigned to.

Notes:

Comments:

Date	Init	Comment
08/28/02	FS	assigned to support

Additional Comments:

Resolution:

Call 19436 has been placed into Support Queue at 01:06:29pm on 28 AUG 02

Completion Date By

Attached File

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Open Requests Screen Page 2

The user is able to read any comments that was added, by themselves, their manager, or The System's House.

Once a support call is entered, it will be referenced, along with the time entered, in the Resolution box.

The user can update any fields, by first changing any of the allowable fields, then clicking on the **UPDATE & EMAIL** icon. If the user wants to email the open request to others, they would click on the **EMAIL TO OTHERS** icon. To reset any fields the user just entered, they would click on the **RESET** icon. To return to the main menu, click on the **RETURN TO OPEN REQUESTS**.

If the **UPDATE & EMAIL** icon was selected, the user would receive a copy of the updated request.

Notes:



Customer Reporting System - Inquiry

Requests

Inquiry

Help

Log Out

Request Number:

Department:

Problem Description:

Problem Resolution:

Request Status:

Entry Date Range: Enter each date using the MM/DD/YY or MM/DD/YYYY format.
You may also select a date value by clicking on the Calendar button.

Starting Date: 

Ending Date: 

Sort By:

Items per page:

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Inquiry

If the user is a Customer Admin, then they will be able to run the inquiry on all the requests for their company. A regular user is only able to run the inquiry on their own requests. The user is able to look up a request through multiple choices. They are able to enter one or multiple of fields and click on the **SEARCH** icon to find a specific request.

Request Number – Enter in the entire request number.

Department – The department number, if used.

Problem Description – Enter in any part of the problem description. The pipe character (used for “OR”) or plus-sign (used for “ADD”) can be used.

Problem Resolution – Enter in any part of the problem resolution. The pipe character or plus-sign can be used.

Request Status – Use the drop down box to choose the Request Status for the inquiry. The selection is: All Requests, Closed Requests, Approved, Completed, Declined, Duplicate, Err/User Instr, Info Pending, Mgr Review, Programming, Quoted, Received, Removed, Support, or User Test.

Starting Date – Enter the starting date using the MM/DD/YY or MM/DD/YYYY format. The user may also select a date value by clicking on the Calendar button.

Ending Date – Enter the ending date using the MM/DD/YY or MM/DD/YYYY format. The user may also select a date value by clicking on the Calendar button.

Sort By – How the user wants the search results sorted. The choices, from the drop down box, are: Request Number, Entry Date, Description, Required Date, and Status.

Items per page – How many search results are displayed per page. The choices, from the drop

Notes:

down box, are: 10, 15, 25, 50. The default is set to 10.

Notes:



Customer Reporting System - Search Results

Requests Inquiry Help Log Out

1 Item was found that matched your search criteria.

Sort By: Request#

Items per page: 10

Click on a Request Number to view detail request information.

Request#	Entry Date	Reqd Date	Description	Status
000165	08/19/02	08/19/02	Trying to maintain a purchase order and the system is saying that it is locked. The purchase order number is 01123456.	Received

1 Items

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Inquiry Screen Page 2

The number of items that matched the searched is displayed.

The user can click on the **SORT BY** icon to change the sort criteria and/or the **ITEMS PER PAGE** icon to change the number of items per page being displayed.

Any matching search results are displayed below.

Each result displays the Request number, Entry Date, Required Date, Description, and Status.

To view the Request, click on the request number.

Notes:



Customer Reporting System - Update

Request# 000214 **Entry Date** 08/28/02 **Updated** 08/28/02 **Closed**

Customer LEESAR HEALTH TRUST
Contact JANE SMITH
Phone 973-777-8050
Phone Ext. 123
Fax 973-777-1483
Email jane@tshinc.com
Mod/Problem Problem
Severity Low
Status Completed
Quote Required No
Customer Priority
Date Required 08/28/02
Department PURCHASING
Menu Path 7,2
System Area Purchasing
Date Promised
Assigned To Rachel M. Johnsen

Description of Problem:

Trying to maintain a purchase order and the system is saying that it is locked. The purchase order number is 01123456.

Special Instructions:

Comments:

Date	Init	Comment
08/28/02	FS	assigned to support
08/28/02	FS	Completed, see resolution.

Resolution:

Call 19436 has been placed into Support Queue at 01:08:29pm on 28 AUG 02 I unlocked the purchase order.

Completion Date 08/28/02 **By** rmj

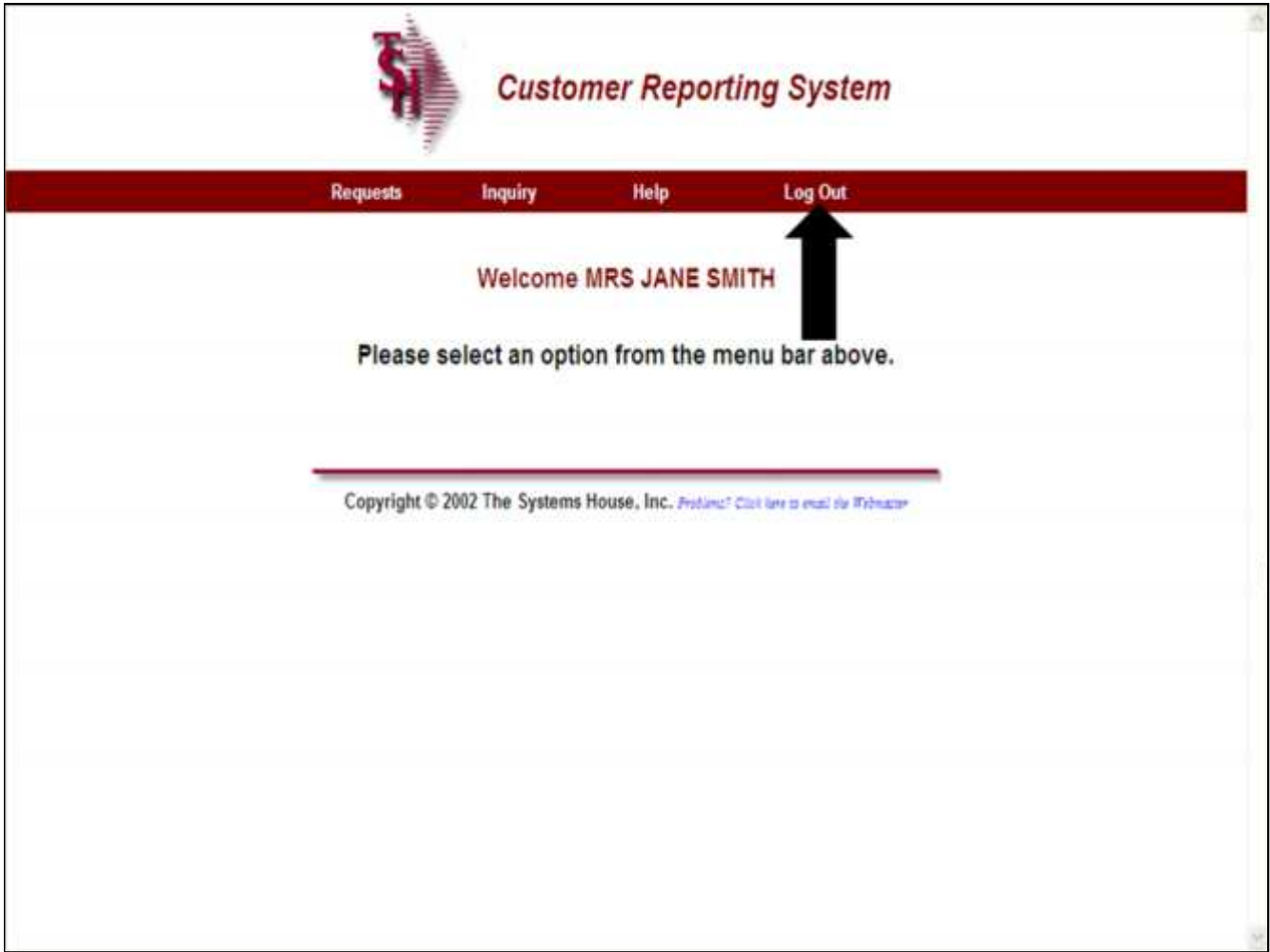
Attached File

Completed Request

When the Request has been completed, the user is sent an email copy of the Request. The emailed Request displays the updated Comments, Resolution, Completion Date, and by whom the Request was completed.

At this point, the user will no longer see the Request listed on the Open Requests screen. The user can view the completed Request by using the Inquiry function.

Notes:



Logging Out

The user simply clicks on the **LOG OUT** field. The user will be returned to the log on screen.

Notes:

Comments:



Where to Get More Information

- For a new login, forgotten password, or additional help, please email custserv@tshinc.com.
- To contact support call 973-777-8050 or fax 973-777-3063.
- To access the The System's House website the address is: www.tshinc.com.

Notes:
