

Software Support Services Helpdesk User Guide

24 April 2017
Revision 3
Final

Purpose

This document is designed to help customers & partners of Software Alliance report issues and raise questions associated with any of our software products using our dedicated support helpdesk.

Background

In order to offer our customers & partners the highest standard of product support we have launched the SAL Support Helpdesk. Powered by best-in-class technology, the helpdesk is designed to offer the following primary features:

- Intuitive, responsive interface for reporting issues, asking questions, and requesting features
- Multichannel access via online (portal), e-mail and agents (phone)
- 24/7 availability of portal allowing ticket submission by customers regardless of location, time zone or working pattern
- A single source of information for customers and us – regardless of the channel used to raise the issue / question / request
- Clear view of status & progress of individual issues
- Integrated Knowledge Base to provide answers to the most common issues / questions

Terminology

The helpdesk and this document uses the following terms.

Term	Description
Portal	The portal provides online access to the SAL Support Helpdesk. It enables new tickets to be raised and the history / progress of existing

Term	Description
	tickets to be viewed. It also provides access to the online Knowledge Base.
Ticket	<p>A ticket is the correspondence between you and the Helpdesk. It can be thought of as a record that contains the entire history of a problem / request / question from the minute it was reported by a user, to the time it gets closed. Every ticket carries a unique reference number that differentiates it from the rest.</p> <p>Once submitted, a ticket will be passed to the appropriate team for review / resolution. Tickets can be raised via the Portal, e-mail or telephone.</p>

Support Channels

While our preferred channel for all future support communication is the online Helpdesk Portal, you can also raise tickets via e-mail and telephone. Regardless of the channel used, all issues / questions / requests will be logged in the same Helpdesk system.

We recommend using the online Helpdesk Portal if possible since it offers a variety of additional features, such as listing all issues with their respective status, history & resolution priority, visibility of issues raised by colleagues, and access to the Knowledge Base of known issues / workarounds / solutions.

Support Process Overview

The flowchart below illustrates the overall support process, regardless of the channel in which an issue, question or request was originally raised.

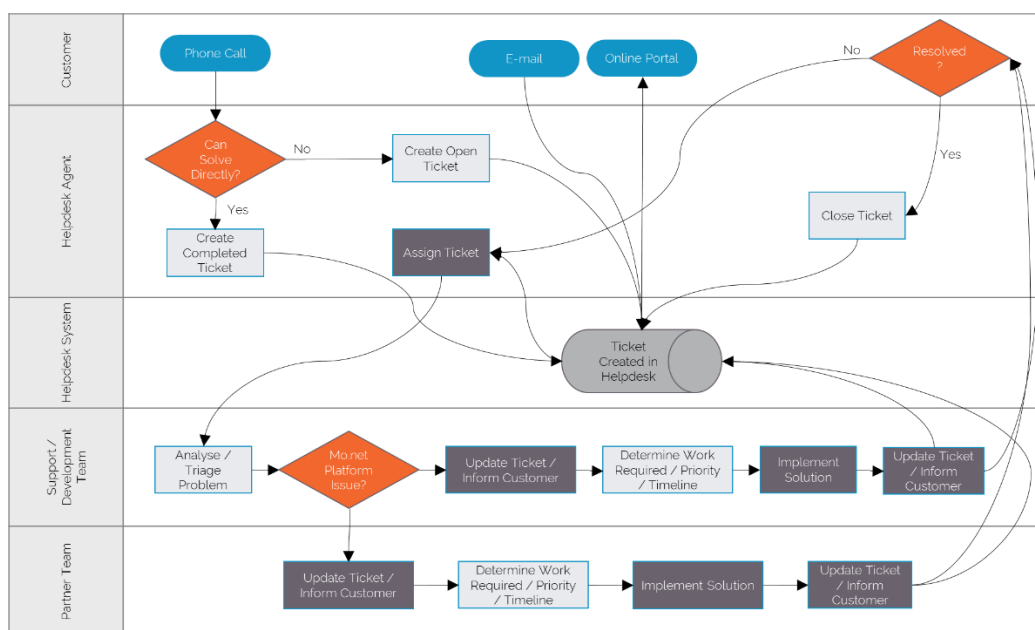


Figure 1 - Support Process Flowchart

Using the Helpdesk Portal

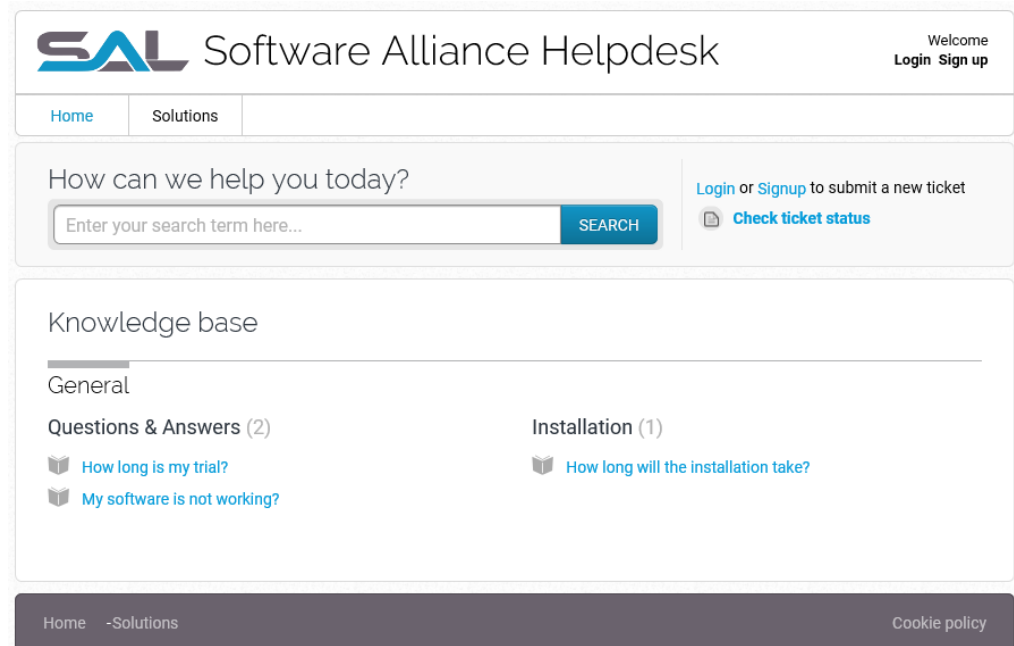
Accessing the Portal

To access the Helpdesk Portal, navigate to the following address:

<https://softwarealliance.freshdesk.com/support/home>

Alternatively, navigate to the Support area of the Software Alliance website:

<http://www.softwarealliance.net/support>



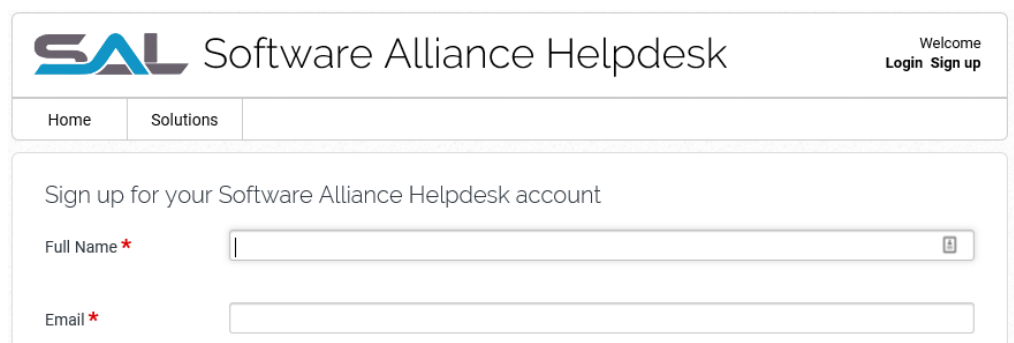
The screenshot shows the Software Alliance Helpdesk Home Page. At the top, there is a navigation bar with the SAL logo, the text "Software Alliance Helpdesk", and a "Welcome" message with "Login" and "Sign up" links. Below the navigation bar, there is a search bar with the placeholder text "How can we help you today?" and a "SEARCH" button. To the right of the search bar, there is a link to "Login or Signup to submit a new ticket" and a "Check ticket status" button. Below the search bar, there is a "Knowledge base" section with a "General" tab. Under the "General" tab, there are two categories: "Questions & Answers (2)" and "Installation (1)". Under "Questions & Answers (2)", there are two links: "How long is my trial?" and "My software is not working?". Under "Installation (1)", there is one link: "How long will the installation take?". At the bottom of the page, there is a footer with "Home", "Solutions", and "Cookie policy" links.

Figure 2 - Helpdesk Portal Home Page

Signing-Up

Before you can log in and use the Helpdesk Portal, your company must be registered as a customer of Software Alliance. If you're already a SAL customer, you can sign-up at or click Sign Up on the Home page of the Helpdesk Portal:

<https://softwarealliance.freshdesk.com/support/signup>



The screenshot shows the Software Alliance Helpdesk Sign-Up page. At the top, there is a navigation bar with the SAL logo, the text "Software Alliance Helpdesk", and a "Welcome" message with "Login" and "Sign up" links. Below the navigation bar, there is a sign-up form with the heading "Sign up for your Software Alliance Helpdesk account". The form has two fields: "Full Name" and "Email", both marked with a red asterisk. The "Full Name" field has a password strength indicator on the right. The "Email" field has a password strength indicator on the right.

Figure 3 - Signing-Up for Helpdesk Portal Access

Once you have signed-up you will receive an activation email and a link to set your password.

Logging In

Having signed-up for access to the Helpdesk Portal you will now be able to login. You can login either by navigating to the following address or by clicking Login from the Home Page of the Helpdesk Portal.

<https://softwarealliance.freshdesk.com/support/login>

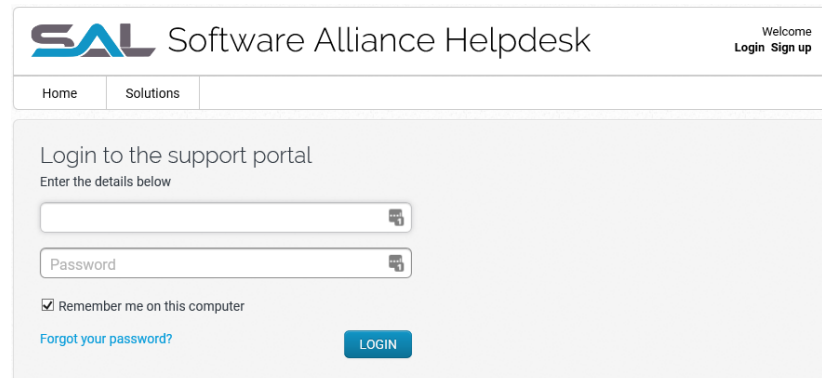


Figure 4 - Logging-in to the Helpdesk Portal

Once logged-in you will be presented with the following page, now with access to existing Tickets.

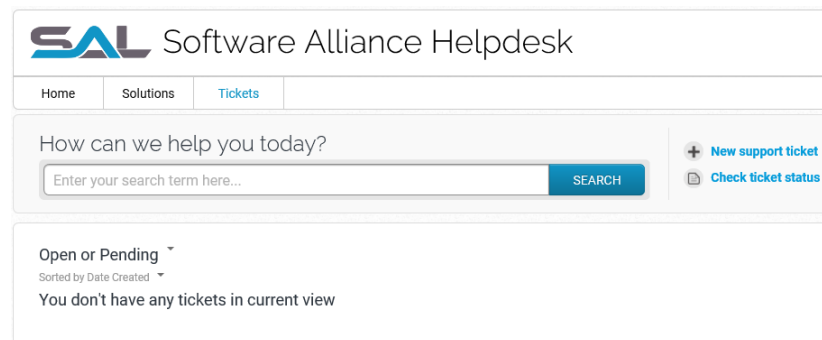


Figure 5 - Logged-in View of Tickets

Managing Your Profile

Having logged-in users can manage their own profile and reset their password by clicking Edit Profile from within the Helpdesk Portal.

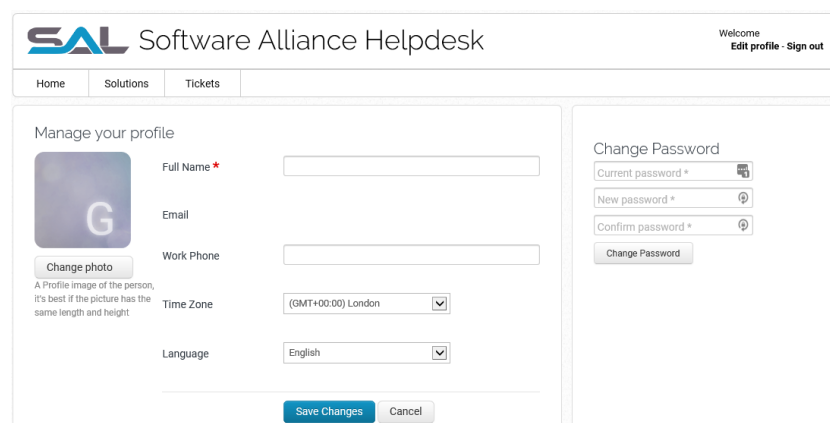


Figure 6 - Editing User Profile

Submitting a Ticket

Customers are encouraged to search the Knowledge Base to check whether the issue, question or request has already been raised before submitting a new ticket. See the Accessing the Knowledge Base section of this document.

To raise a new Ticket simply click on the New Support Ticket link from either the Home, Solutions or Tickets page. This will open the Submit a Ticket page and prompt the user to enter information relating to the issue, question or request.

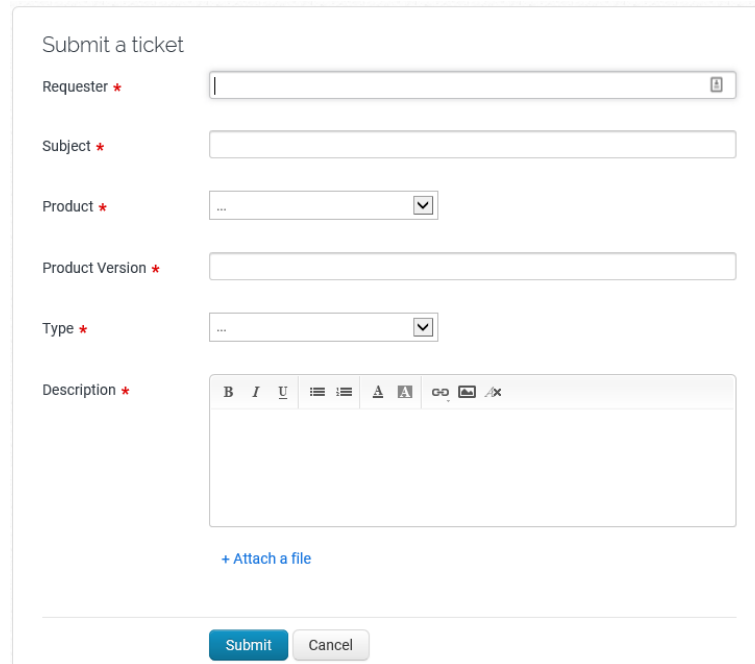


Figure 7 - Raising a New Ticket

The following information must be entered in order to submit a new ticket:

Field	Description
Requestor	The email of the person raising the ticket; this will usually be the logged-in user and will default to that email address, however it is possible to submit issues on behalf of colleagues
Subject	A short title for the ticket
Product	The specific Software Alliance product to which the ticket relate: <ul style="list-style-type: none"> Model Development Studio Quotations Service Execution Service Mobile Modeller Master Worker Tools
Product Version	The version of the software product in use
Type	See below for a description of the possible ticket types
Description	A detailed description of the issue, question or request. Please explain issues, problems or errors as accurately & clearly as possible, and attach screenshots / other supporting evidence, if applicable. This makes it easier to find an answer or a solution to your problem or query.
Attachment	If appropriate, any supporting files / screenshots can be attached to the ticket.

Ticket Types

Type	Description
Issue	New problems are usually created with this type until it's determined whether it is a bug in the program, or simply a misunderstanding that can be resolved with a little explanation.
Inconvenience	Can be used for reporting a minor disadvantage / shortcoming / cosmetic issue of the product, but cannot be considered a genuine bug
Defect / Bug (Error)	Error in the product / service
Question (Query)	Query for the support / development team regarding the operation of the product / service
Suggestion	Product / service enhancement or change request
Licensing Query	For any issue / query relating to your Mo.net product license
Other	Any other issue, question or request that doesn't fit into any of the categories above

Once all fields have been populated, click on the Submit button to raise the ticket.

Ticket Confirmation / Initial Response

You will receive immediate e-mail confirmation on the receipt of the new ticket. The time taken to receive an initial response to your issue, question or request will depend on the nature of the ticket and the level of support provided to your organisation. However, we aim to provide an initial response to most new tickets on the same business day.

Monitoring Ticket Status & Progress

As the ticket is reviewed / actioned by the Software Alliance support and / or development teams, the ticket will be updated accordingly. You will be kept informed via email of any progress or if additional information is required to help resolve any issue.

To check the status of an existing support ticket, simply navigate to the Tickets page within the Helpdesk Portal. This will list all open (or past) tickets and their current status.

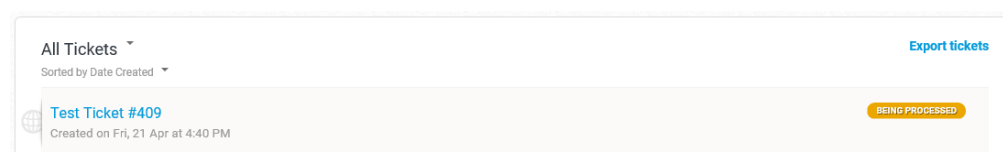


Figure 8 - List of Open Tickets

Editing a Ticket

Once the ticket has been submitted, further information can be added simply by clicking on the ticket itself. This will show the Edit Ticket page allowing further details to be added.

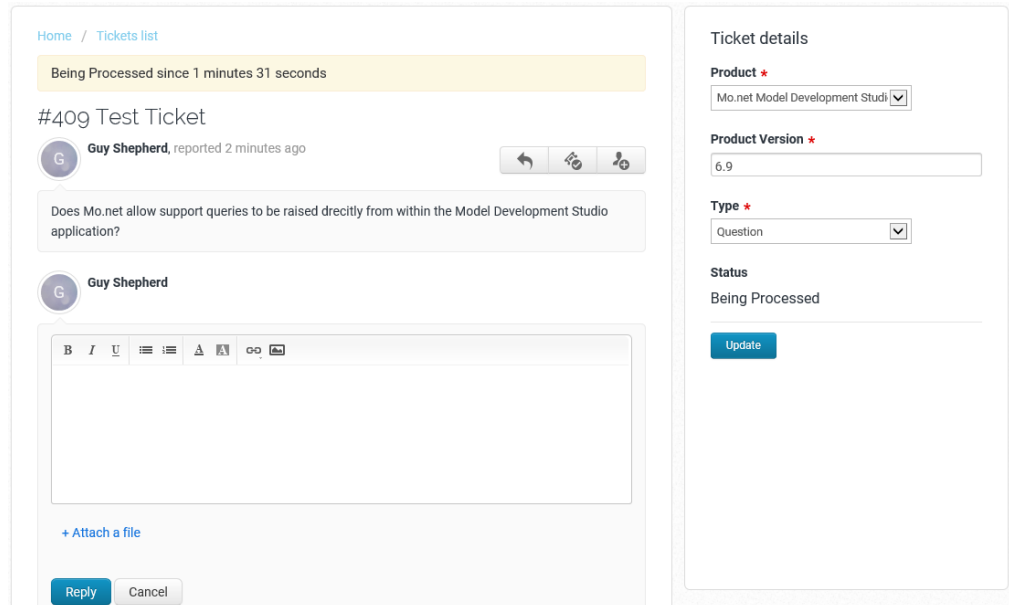


Figure 9 – Editing an Existing Ticket

Closing a Ticket

After the issue, question or request associated with the ticket has been resolved to your satisfaction, the ticket will be closed. You will receive an email confirming this. Should the ticket need to be reopened for any reason this can be done by editing the ticket in the Helpdesk Portal, or simply replying to the Ticket Closure email, and stating the reason for reopening.

Submitting a Ticket via e-mail

While our recommended approach is to submit tickets using the Helpdesk Portal, it is also possible to raise tickets directly via email. Sending an email to the address below will create a new ticket using the information in the subject / body of the email as the ticket description.

 support@softwarealliance.net

For any tickets raised via email it's important that the following information is included in the body of the email.

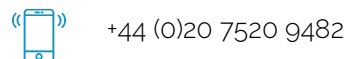
- Product
- Product Version
- Type of Ticket
 - Issue
 - Inconvenience
 - Defect / Bug (Error)
 - Question (Query)
 - Suggestion
 - Licensing Query
 - Other
- Description

- Plus any screenshots / file attachments

This information will be added to the appropriate ticket fields by a member of the SAL Support team.

Submitting a Ticket via Telephone

While our recommended approach is to submit tickets using the Helpdesk Portal, it is also possible to raise tickets directly with the Software Alliance Support Helpdesk via telephone. To raise a new ticket via telephone please call the number below during normal business hours (9am-5pm Monday to Friday, excluding Bank & Public Holidays).



The helpdesk agent will prompt you to provide the same information required when raising a ticket via email, so please ensure you have this to hand.

Accessing the Knowledge Base

The Helpdesk Portal also provides a Knowledge Base containing commonly raised issues and questions. Customers are encouraged to search the Knowledge Base to check whether the issue, question or request has already been raised before submitting a new ticket. To access the Knowledge Base please navigate:

<https://softwarealliance.freshdesk.com/support/solutions>

The knowledge base will be updated periodically to reflect the most commonly raised issues and frequently asked questions.

Searching the Knowledge Base

To search the Knowledge Base, simply start typing appropriate keywords / search terms into the "How can we help you today?" search box at the top of the Home, Solutions or Tickets pages. This will display a list of possible Knowledge Base articles that match your search criteria.

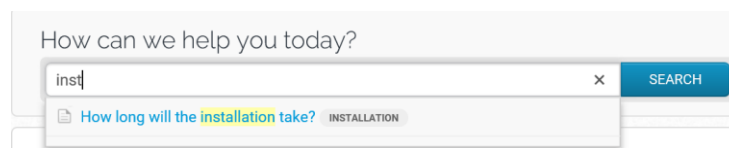


Figure 10 - Searching the Knowledge Base

Resources

Please refer to www.softwarealliance.net for the following additional resources:

- White Papers
- Use Cases
- Datasheets
- Documentation
- Product / Trial Downloads

Contact Us

For more information regarding the Software Alliance Support Helpdesk or any component of the Mo.net Financial Modelling Platform, please contact us:



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