Rational Software

Getting Started with Rational Customer Service Online Case Management

Release 1.0

Table of Contents

1. Introduction

Rational Software's Online Case Management tool provides complete service request management by allowing customers to submit new Technical Support or Licensing service requests, track and update existing service requests and view Customer Service solutions regardless of the business hours of our Support Centers. Customer users may attach files of any format to a service request, enhancing communication between the user requesting service and Rational's Customer Service Representatives.

This document provides instructions for using the most common capabilities on the Web Site.

2. Site Capabilities

Presented below is an overview of the capabilities available on the Rational Customer Service Online Case Management Web Site.

2.1 Service Requests

Users may submit new Technical Support or Licensing service requests, track and update existing service requests and attach images, log files and other documents related to resolving the service request issue.

2.2 Solutions Knowledge Base

The Solutions Knowledge Base is directly integrated into the Case Management Web Site. Solutions associated with resolving a Service Request may be accessed directly from a service request's detailed view.

2.3 User Profile

Users may update their own profile, including name, telephone number, email address and support language to be used when interacting with Rational Software.

2.4 User Administration

Authorized users may update the profiles of other users in the same account, as well as add additional users to their Account and enable them to enter the Case Management Web Site. One of three levels of user authorization may be selected for each user:

- Individual Registered User - A person with this authorization level may submit requests for service, review and update Service Requests for which they are the contact of record.

- Account Registered User - A person with this authorization has all the privileges of the Individual Registered User, plus they may review and update any Service Request associated to other users within their same Account Site.

- Delegated Customer Administrator - A person with this authorization level has all the privileges of the Account Registered User, plus they may enable additional users to access the Case Management Web Site.

3. User Instructions

3.1 Logging In

The following steps describe how to find and enter Rational Customer Service's Case Management Web Site:

1. Open your Web browser and enter the address http://eservice.rational.com to reach the entry page shown in Figure 1.

2. Enter your user login name and password.

   - The user login name is not case sensitive

   - The password is case sensitive

3. Choose "Log in" to enter the site.

Figure 1 - Rational Customer Service's Case Management Entry Page
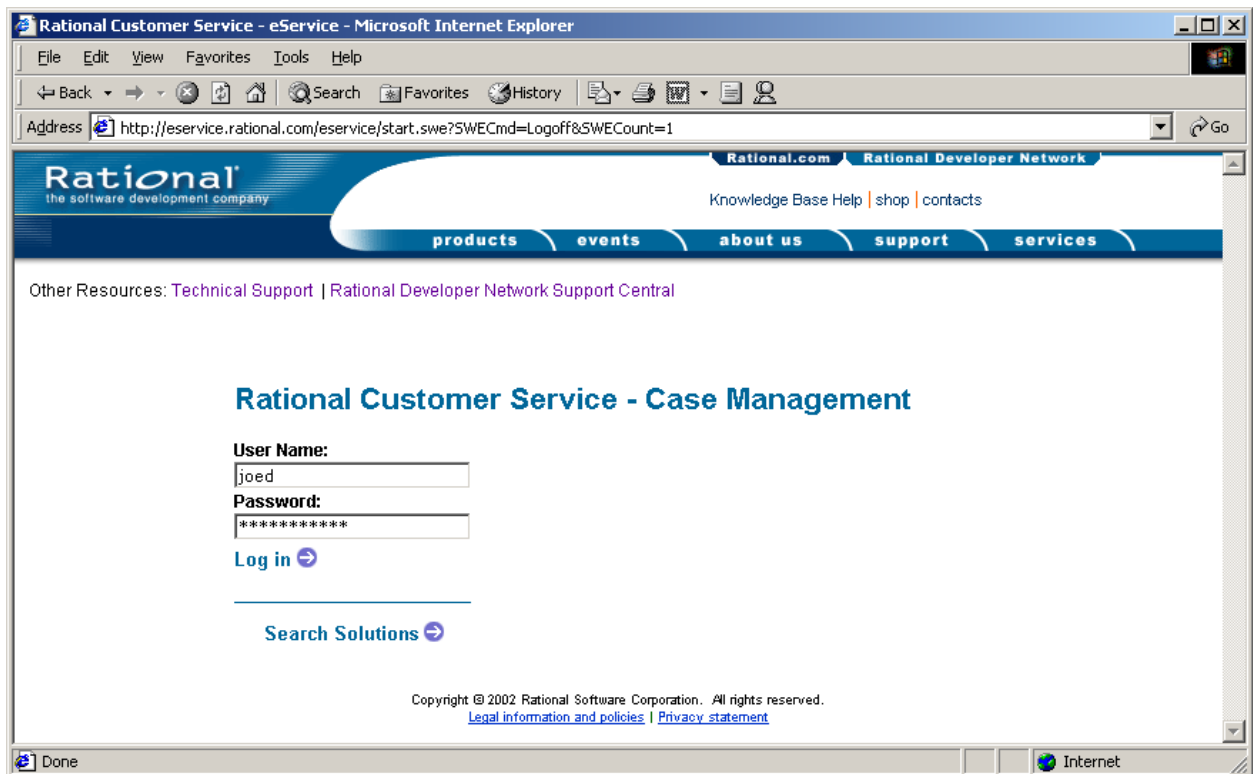
Users may also proceed directly to the Solutions Knowledge Base by choosing "Search Solutions". No user login name or password is required to enter the Solutions Knowledge Base.

3.2 Updating Your User Profile

The following steps describe how to view and update your own user profile.

1. From any screen, choose the "Profile" button located in the upper right hand corner to reach the User Profile View shown in Figure 2.

2. To make changes to your profile, choose "Edit". You will be presented with the Edit User

Profile View shown in Figure 3.

3. Modify any of the information presented. You may not modify

- User Login Name

- Account Name (not shown in the Edit User Profile View)

- Account Site (not shown in the Edit User Profile View)

4. Use the "Select" button to choose the language you wish to use when communicating with Rational Customer Service. Rational uses this setting to assign your service requests to an appropriately skilled Licensing or Technical Support Representative.

5. Choose "Save" when done, or choose "Cancel" if you do not wish to make any changes at this time.

Figure 2 - User Profile View
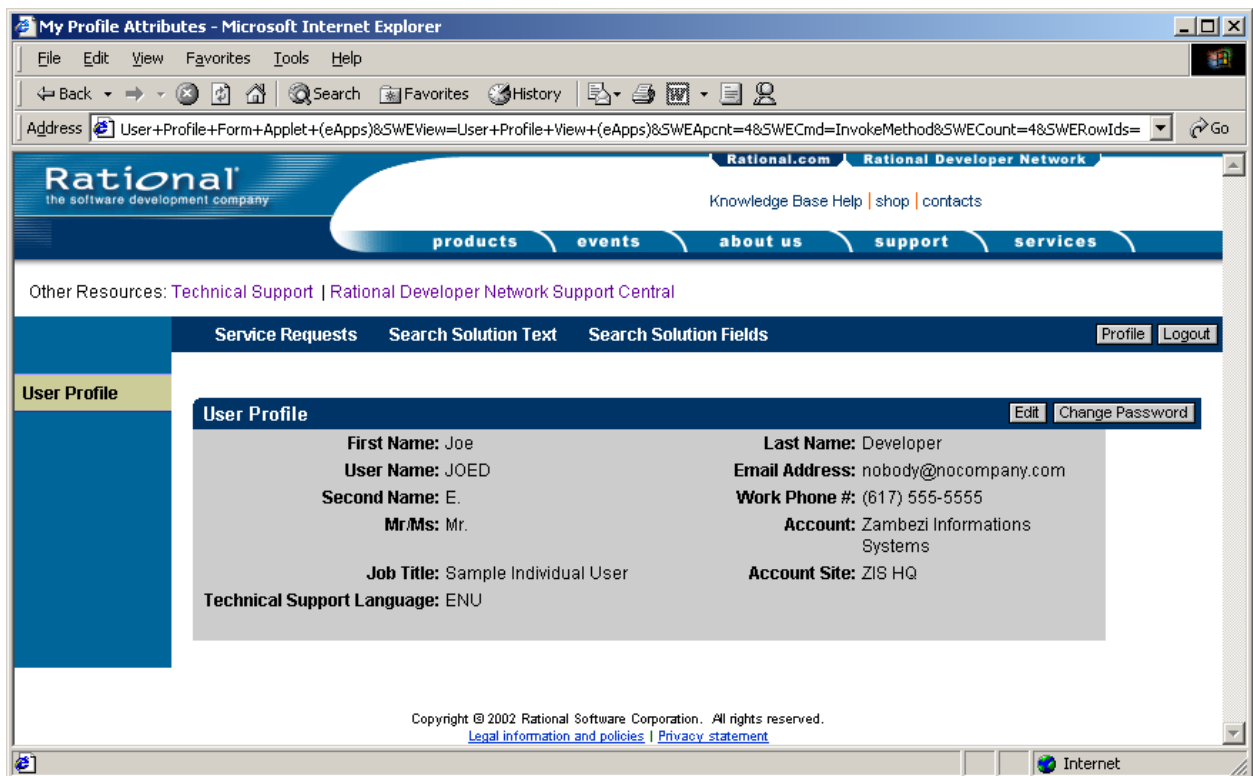
Figure 3 - Edit User Profile View
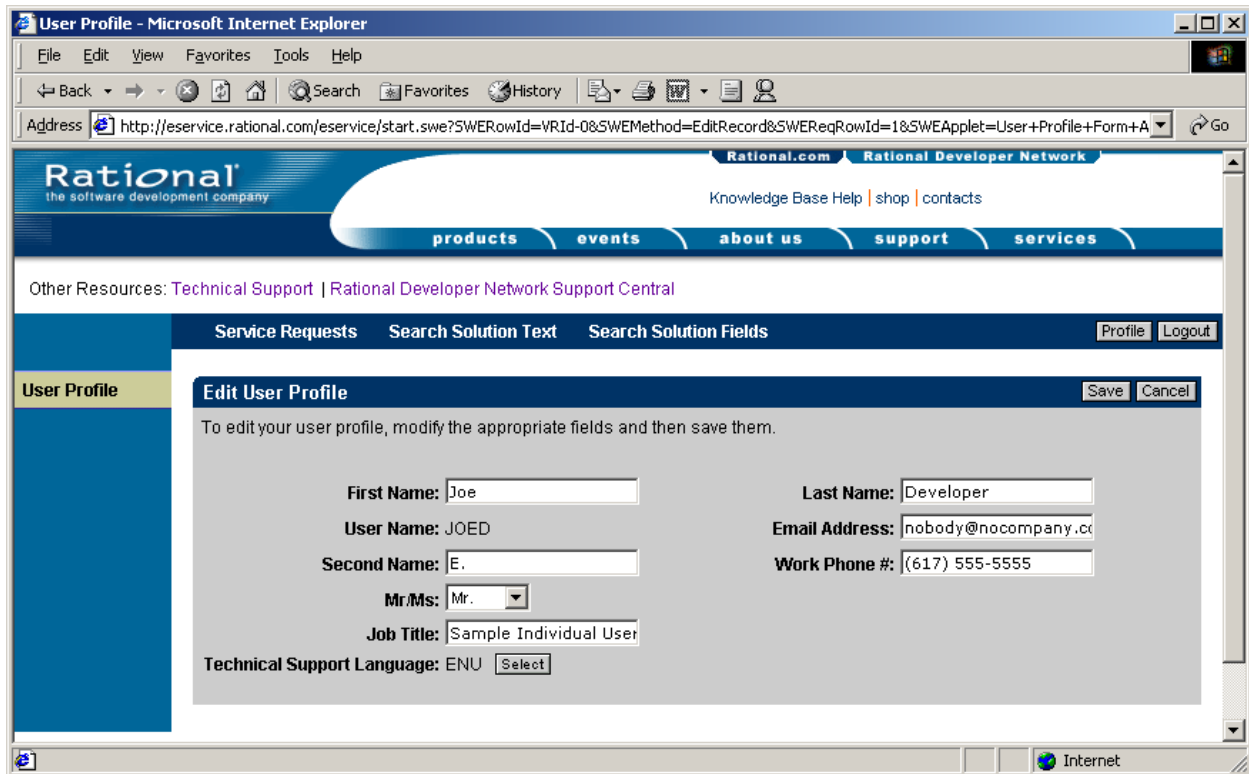
3.3 Finding a Service Request

The following steps describe how to locate an existing Service Request from either the My Service Requests View or the My Company's Service Requests View.

For instructions on how to submit a new Service Request, see Section 3.4.

1. Choose "Service Requests" and then choose either "My Service Requests" or "My Company's Service Requests".

   The "My Company's Service Requests" View is only displayed for users with the Account Registered User or the Delegated Customer Administrator authorization levels.

2. Up to ten Service Requests are displayed in the list at one time. If there are more than ten Service Requests, use the "Next" and "Previous" button to navigate through the list ten records at a time.

3. Alternatively, choose "Find" to be presented with the Find Service Requests View as shown in Figure 5.

   Find allows you to query the specific fields shown in the view you selected. You may use operators such as < (less than), > (greater than), and = (equals) to build a query. It is recommended you surround your keyword(s) in the Subject field with asterisks (*).

   To select a Product from a list of values, choose "Select" to be presented with the Pick Product View. To find a product of interest, you may navigate the list of products by choosing "Next" and "Previous". Alternatively, you may choose "Find" to perform another query within the Pick Product View. Select a blue arrow to choose the product of interest.

4. Choose "Submit" to execute your query.

5. The results of the query are displayed in the view from which you initiated the query.

Figure 5 – Find Service Requests View
This figure depicts the My Service Requests View
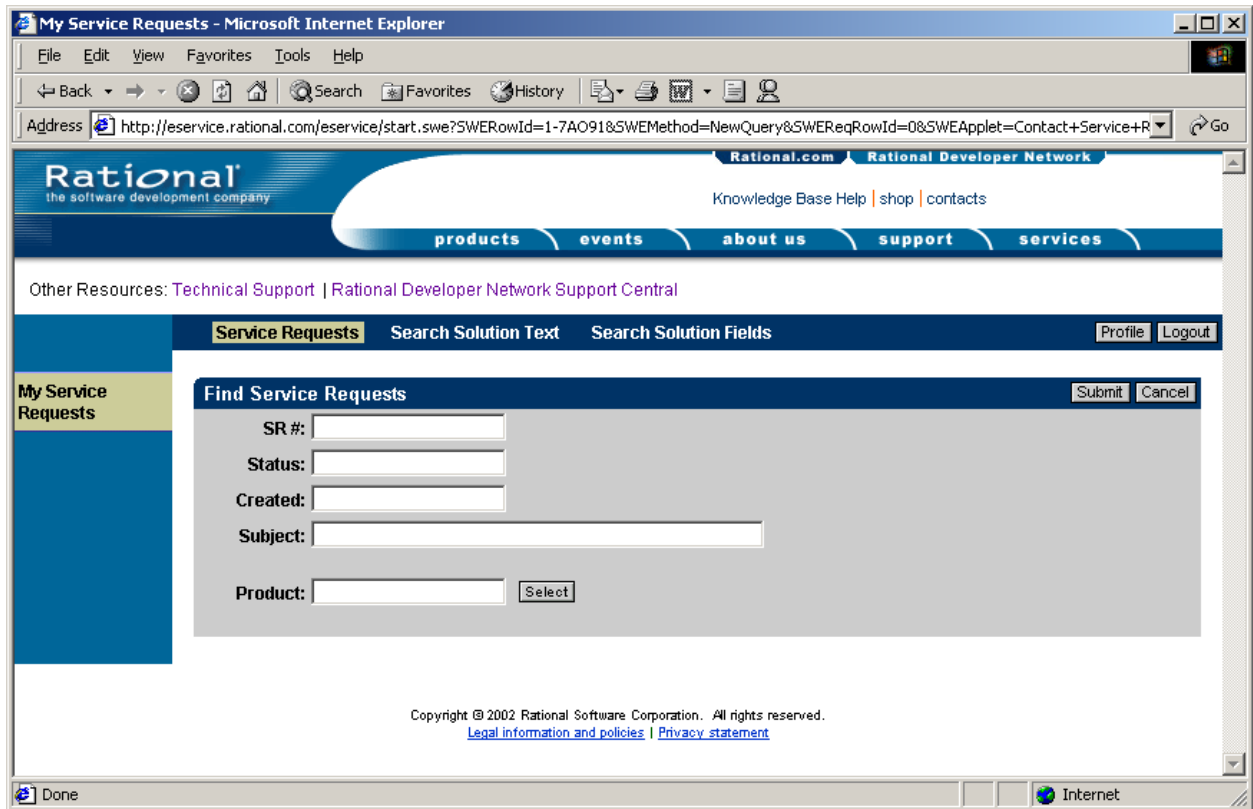
3.4 Submitting a New Service Request

The following steps describe how to submit a new request for service.

1. Choose "Service Requests" and then choose either "My Service Requests" or "My Company's Service Requests". The "My Company's Service Requests" View is only displayed for users with the Account Registered User or the Delegated Customer Administrator authorization level.

2. Up to ten Service Requests are displayed in the list at one time.

3. Choose the "New" button to be presented with the New Service Request View as shown in Figure 6.

4. Complete the form. All fields marked with an asterisk (*) are required.

To select a Product from a list of values, choose "Select" to be presented with the Pick Product View. To find a product of interest, you may navigate the list of products by choosing "Next" and "Previous". Alternatively, you may choose "Find" to perform another query within the Pick Product View. Select a blue arrow to choose the product of interest.

To select a Platform from a list of values, choose "Select" to be presented with the Pick Platform View. To find a platform of interest, you may navigate the list of platforms by

choosing "Next" and "Previous". Alternatively, you may choose "Find" to perform another query within the Pick Platform View. Select a blue arrow to choose the platform of interest.

5. Select "Save" to submit your request. The system returns you to either the "My Service Requests" view or the "My Company's Service Requests" view, as appropriate. The Service Request you just submitted will be the first item on the list.

6. If you wish to add additional details to your request, or add supporting files, select the hyperlink in the SR# column to be taken to the Service Request Details View. Instructions on how to update a Service Request, or add attachments, are provided in Section 3.5.

Figure 6 – New Service Request View
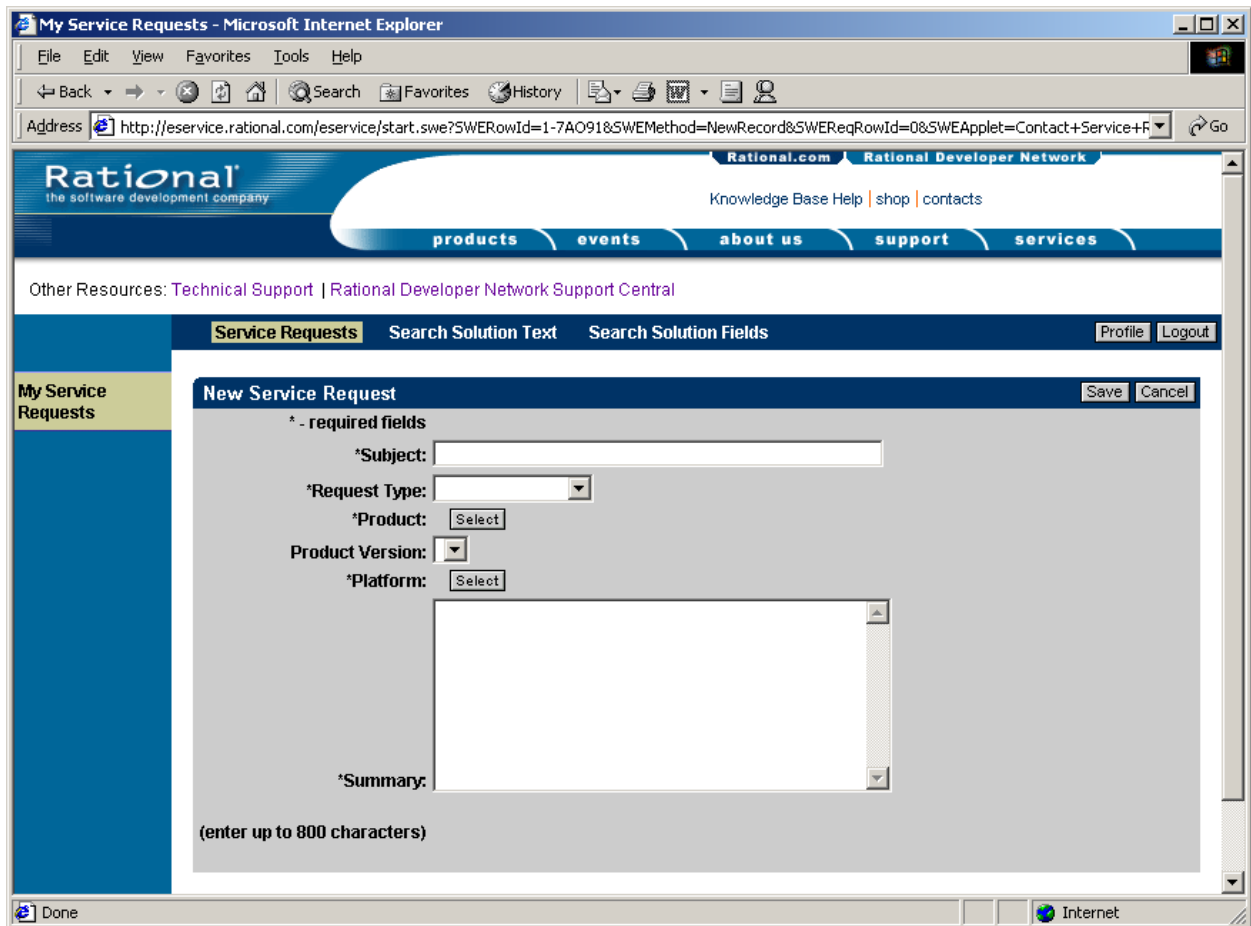
3.5 Service Request Details

The steps below describe how to review the details of a Service Request, how to view related Solutions, and how to add updates and attachments to the Service Request.

The Service Request Detail View contains four sections

- Service Request Details – this section displays the core attributes of the Service Request

- Updates – this section displays the communication exchange between you and Rational Customer Service. Up to ten items may be displayed at once. Use the

"Next" and "Previous" buttons to move through the list by ten items at a time.

- Attachments – this section displays files related to the Service Request. You or Rational Customer Service may add files. Up to ten items may be displayed at once. Use the "Next" and "Previous" buttons to move through the list by ten items at a time. You may view or download a file by selecting on the File Name hyperlink for the item of interest.

- Associated Solutions – this section displays Solutions Knowledge Base documents that Rational Customer Service has associated to this Service Request. Up to ten items may be displayed at once. Use the "Next" and "Previous" buttons to move through the list by ten items at a time. You may view a Solution by selecting the Subject hyperlink for the item of interest.

Viewing Service Request Details

1. Choose "Service Requests" and then choose either "My Service Requests" or "My Company's Service Requests". The "My Company's Service Requests" View is only displayed for users with the Account Registered User or the Delegated Customer Administrator authorization level.

2. Up to ten Service Requests are displayed in the list at one time. The My Service Request View is shown in Figure 7.

3. Use the Up and Down arrows in any column heading to sort the records in ascending or descending order, respectively.

4. Select the hyperlink in the SR# column to be presented with the Service Request Details view for a particular record. The Service Request Details View is shown in Figure 8.
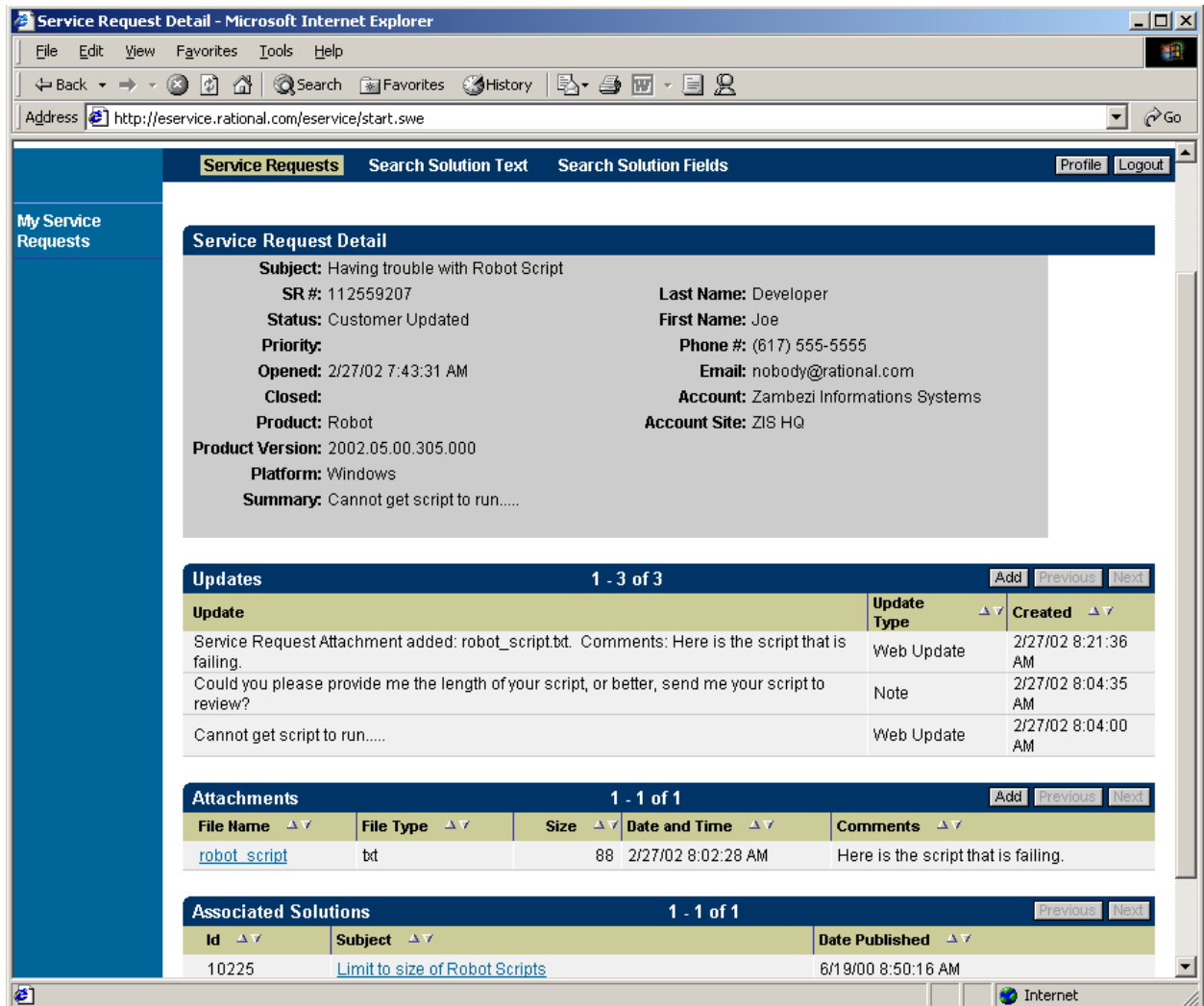
Figure 7 – My Service Requests View

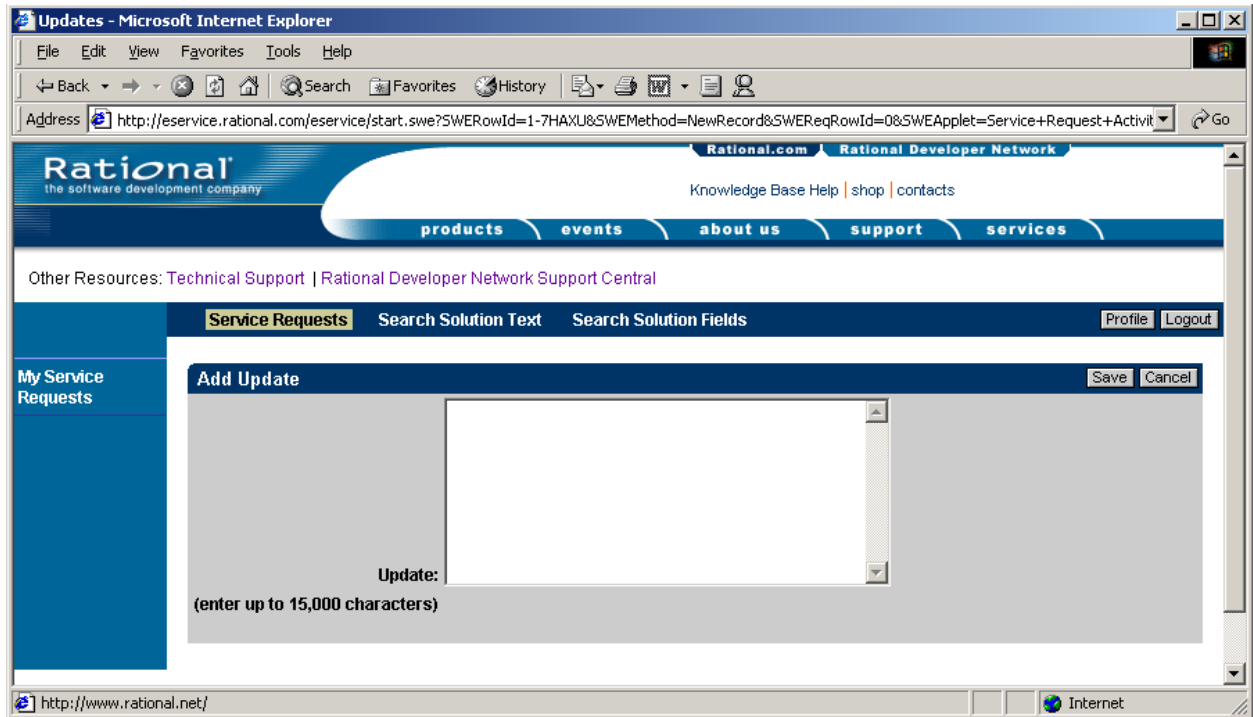**Figure 8 – Service Requests Details View**

Adding an Update to a Service Request

The steps below explain how to communicate new information to Rational regarding a Service Request.

1. In the Service Request Detail View (shown in Figure 8), choose the "Add" button on the Updates title bar to be presented with the Add Update View shown in Figure 9.

2. Enter information into the Updates field.

3. Choose "Save" to submit and save this update to the Service Request record. Otherwise, choose "Cancel".
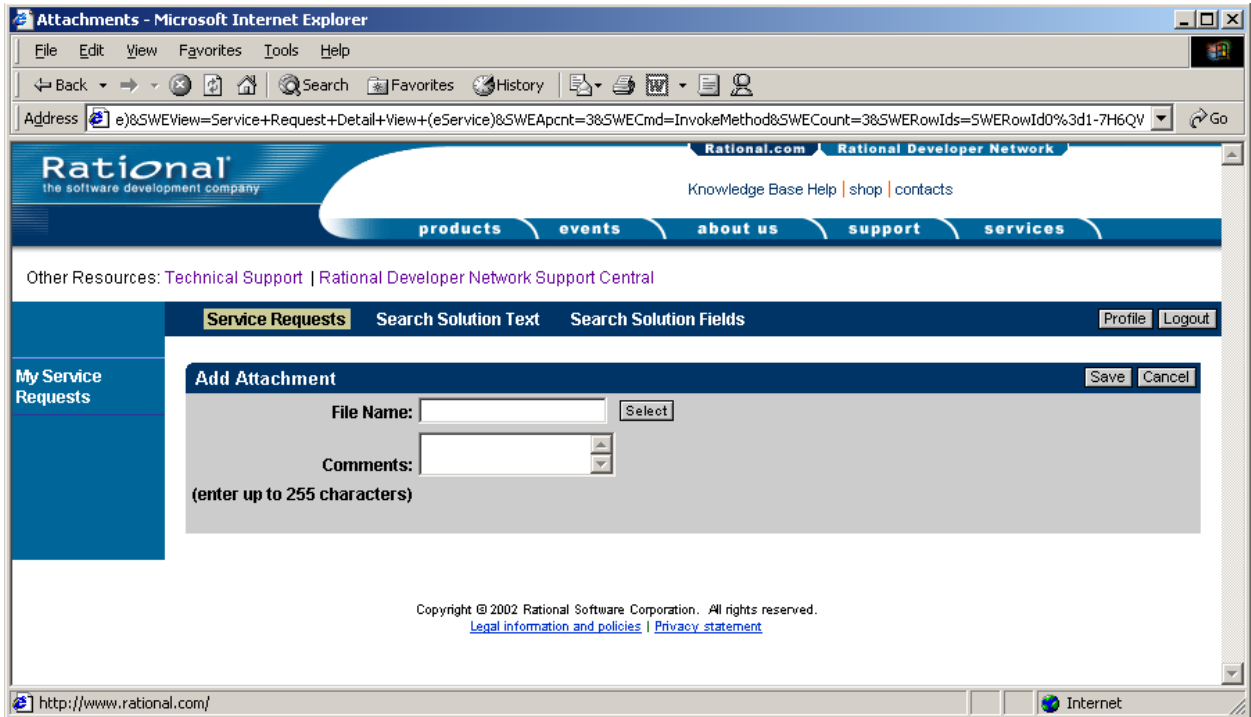
Figure 9 – Add Update View

Adding an Attachment to a Service Request

The steps below explain how to add files to support your Service Request.

1. In the Service Request Detail View (shown in Figure 8), choose the "Add" button on the Attachments title bar to be presented with the Add Attachment View shown in Figure 10.

2. To select a file, choose the "Select" button and then on the next screen, choose the "Browse" button". The Choose File window will be displayed.

3. Within the Choose File window, select the file you wish to add and select "Open".

4. Select the "Add" button.

5. In the Comments field, enter any information you wish to communicate about this file, up to a maximum of 255 characters.

6. Select the "Save" button to upload the file to Rational.

7. Choose "Save" to submit and save this update to the Service Request record. Otherwise, choose "Cancel".

Figure 10 – Add Attachment View

Viewing an Associated Solution

The steps below explain how to view a Solutions Knowledge Base document related to the Service Request.

1. In the Service Request Detail View (shown in Figure 8), scroll down to the Associated Solutions section at the bottom of the view.

2. Select the Subject hyperlink of the item of interest to be presented with the Solution Detail View as shown in Figure 11.

Figure 11 – Solution Detail View
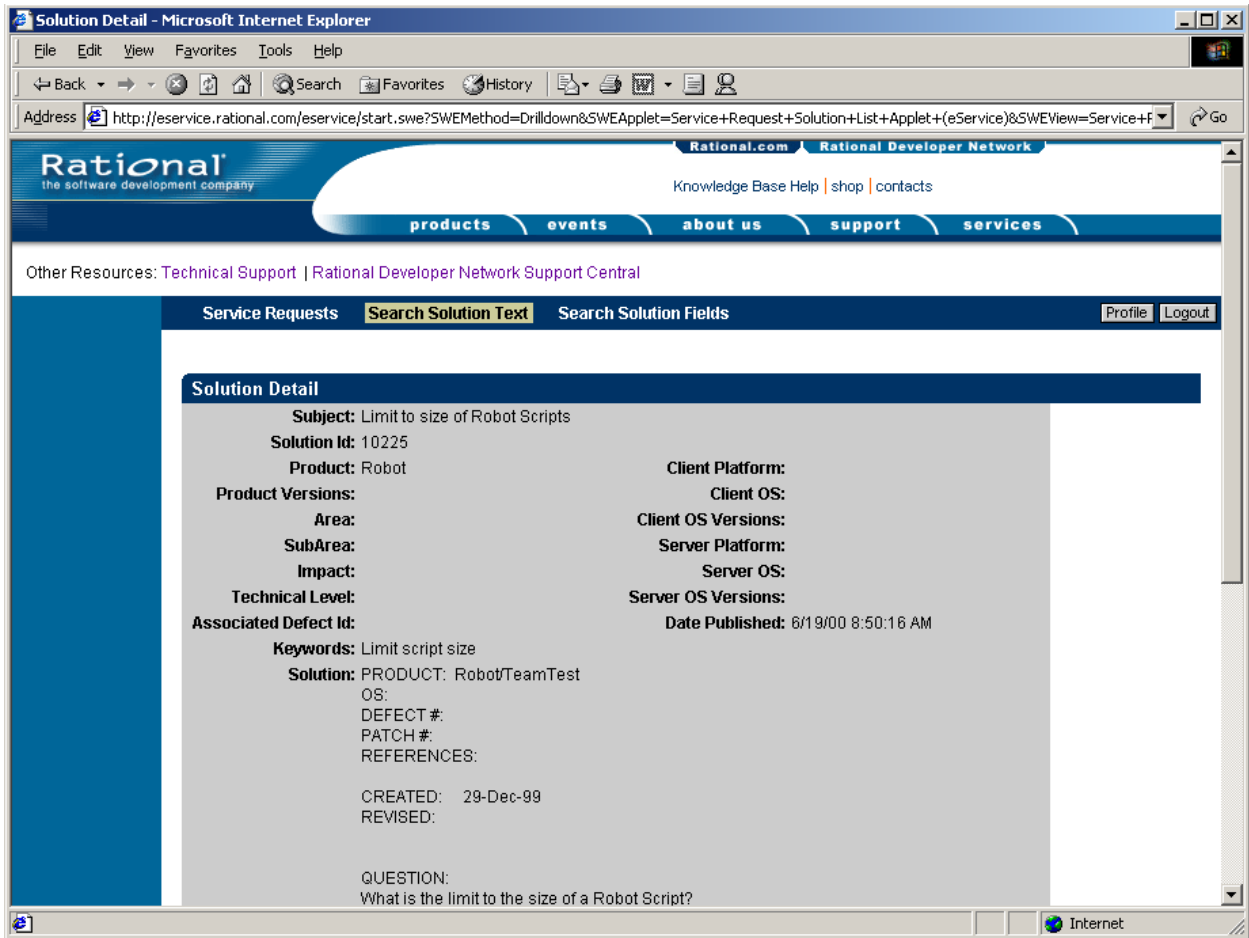
4. Known Issues

Presented below are the functional issues known at the time this document was published:

1. Updates may be displayed out of time sequence.

   The order of the updates displayed may be out of time stamp sequence if several updates occur within the same business day. Rational is attempting to resolve this issue as quickly as possible.

2. The first error received for an incomplete Service Request submission is cryptic.

   If you review the error message carefully, the actual issue that resulted in the error is included within the text displayed. Choose the "Back" button within the error message to return to the New Service Request Submission Form. Correct the issue and resubmit.

   Note - all fields on the New Service Request Submission Form are required, except for Product Version. You will continue to receive error messages until all the required fields are completed.

3. Error Message: "Command InvokeMethod requires a value for argument SWEMethod."

   This error message occurs when using the "Enter" key on your keyboard to submit a query in the Find Product View. To correct this issue, choose the "Search" button on that view.