

User Guide

Customer Service Portal-
Case creation & management

V4.0

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Logging a case

The Knowledge Base contains a lot of useful information on commonly reported or already answered queries, so please ensure this is checked as it might reduce the need to contact Customer Services.

Create a new case

Click “My Support” from the navigation bar.

Click the “Create a new case” button (to the right of the search box) to enter the new case screen.



Please note that this is only available for logged in users.

Enter information

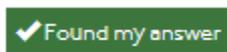
From the new case screen, please enter the following information:

Subject

The Subject field should be used to briefly summarise the issue or enquiry. Please note this field is limited to 180 characters.

When typing in the Subject field, Knowledge Base Articles (KBAs) will be displayed based on what you have typed. Please take time to look at these as it may give you the answer without having to create a case.

If a KBA gives you the answer, please click the “Found my answer” button to advise us it was useful.

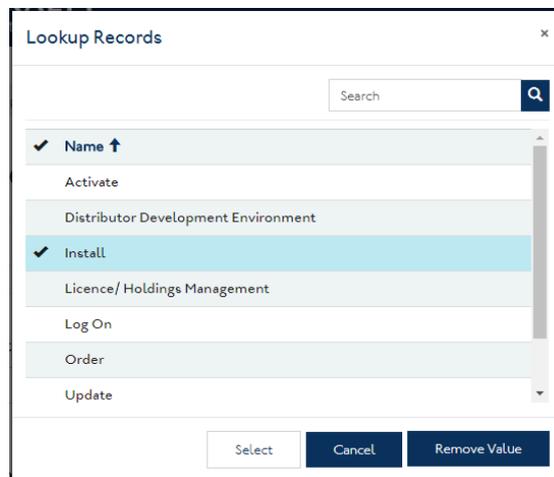


If the KBA is not relevant, or you wish to view other suggestions, click your browsers “back” button to return to the new case screen.

Function

The Function is what you, or the user, are trying to do. Click the magnifying glass

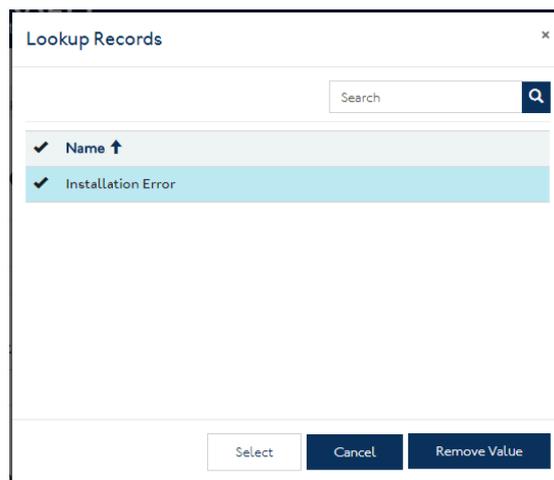
button to show the Function list in a new window. Click the relevant Function and then click select. This will close the window and add the selected Function to the field.



The Function selected at this point will filter what options are available in the Sub Function list.

Sub Function

The Sub Function gives extra detail about the task you, or the user, are trying to do. Click the magnifying glass button to show the Sub Function list in a new window. Click the relevant Sub Function and then click select. This will close the window and add the selected Sub Function to the field.



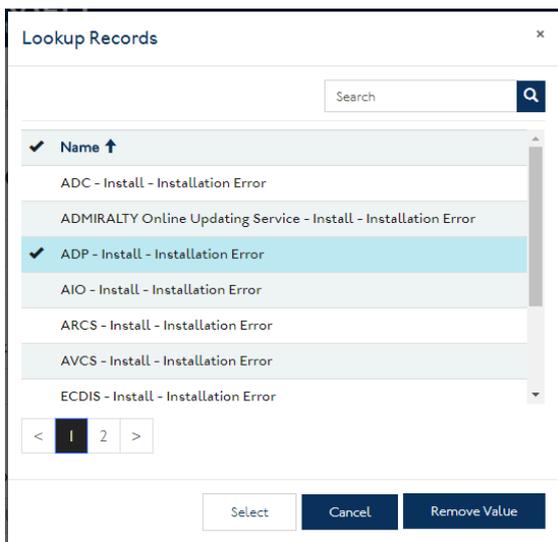
The Sub Function selected at this point will filter what options are available in the Product Function list.

Product Function

The Product Function combines the

Function and Sub Function with a Product to enable categorisation of the enquiry.

Click the magnifying glass button to show the Product Function list in a new window. Click the relevant Product Function and then click select. This will close the window and add the selected Product Function to the field.

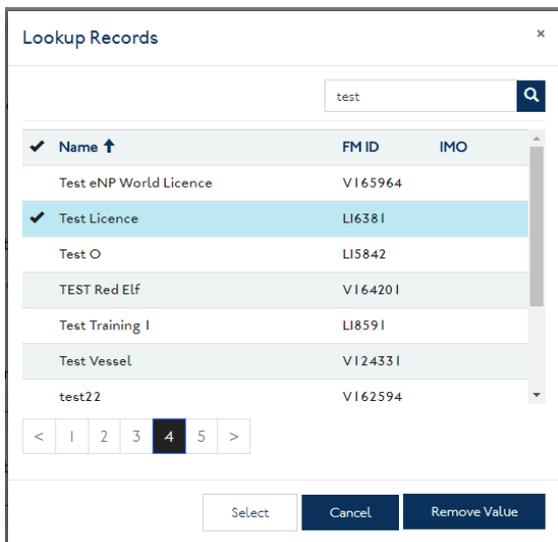


The list is alphabetical, so you might need to view the second page to find the required Product. Alternatively, you can use the search bar.

Vessel

This field should be used to associate the case with the affected Vessel.

Click the magnifying glass button to show the Vessel list in a new window.



Vessels can be searched for by name, Fleet Manager (FM) ID or IMO number. Please ensure you add an asterisk (*) in front when searching by FM ID or IMO.

Click the relevant Vessel and then click select. This will close the window and add the selected Vessel to the field.

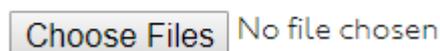
Description

The Description field should be used to tell Customer Services of any other relevant information that may assist them in investigating your case. Please include details such as steps already taken; any error messages; order/invoice numbers or anything else that you think would be useful. Please do not just copy and paste an email conversation; please provide a summary as this will enable Customer Services to get straight into their investigation.

Attach a File

Attachments can be added to the case to provide screen shots or files that may help Customer Services investigate. Click the Choose Files button under the Description field.

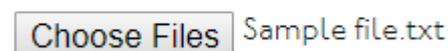
Attach a File



This will open up a new window where you can select the file to attach. If more than one file is required, hold down Ctrl on your keyboard and click each file you want to attach. Once the file(s) have been selected, click the Open button to add to the case.

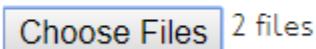
If one file is attached, the name of this file will be displayed.

Attach a File



If multiple files are attached, the number will show.

Attach a File



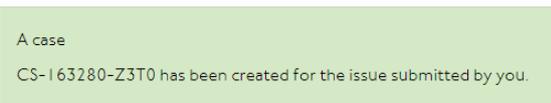
If you want to remove the attached file(s), click Choose Files and then click the Cancel button.

Submit the case

When you have finished entering all of the information and have added any attachments, click the Submit button at the bottom of the page.



This will take you back to the “My Support” page and briefly show a confirmation with the case number at the top of the screen.



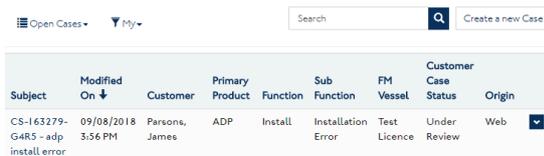
Your case will now be visible within the Open Cases table. If it does not show, please allow a few minutes and refresh your browser (Ctrl+F5).

Views and searching

As well as creating cases, other functionality is available from the My Support page.

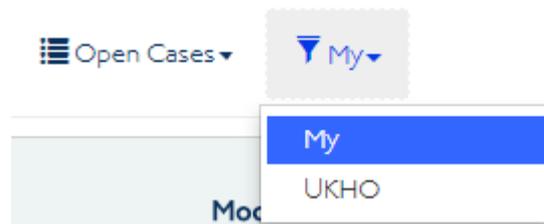
Case Views

Cases are displayed in the table based on the view and/or filter selected.



When a view is selected (Open, Closed or All Cases), filters can be applied. By default, the “My” filter will be selected. This

will show cases created by the user that is currently logged in. Your company name will also be available as a filter. This will show all cases created by any user within your company.



The filter will only apply to the selected view. If this changes, the filter will revert to the default (My).

Click the case Subject to open it.

Basic searching

The case search box will allow you to search against any of the columns in the view. Results will be returned where the search term is at the beginning of a field.



Please be aware that the search will only apply to the view and filter you have selected. For example, if you search for a case that is closed, but you have the Open Cases view selected, no results will be returned. If you change the view to Closed or All Cases, you will return the correct result.

Advanced searching

An asterisk (*) can be used to extend searches. Adding a * to the beginning of a search term will return results where that term is anywhere within the field.

For example, searching “ADP updating issue” will probably not return any results because it is unlikely any field will start with that exact phrase.

However, searching “*ADP updating issue” will probably return some results as it is more likely that phrase would be

present somewhere within the Subject or Description.

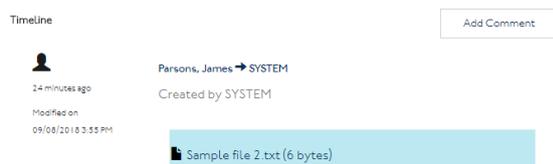
Advanced searching is still limited to the view and filter that is selected (for example, a closed case would not be returned if the Open Cases view is selected).

Managing a case

Further functionality is available when viewing a case.

Adding a comment to a case

When you view an individual case, all of the details captured at creation are visible. Interactions with Customer Services are shown on the Timeline.

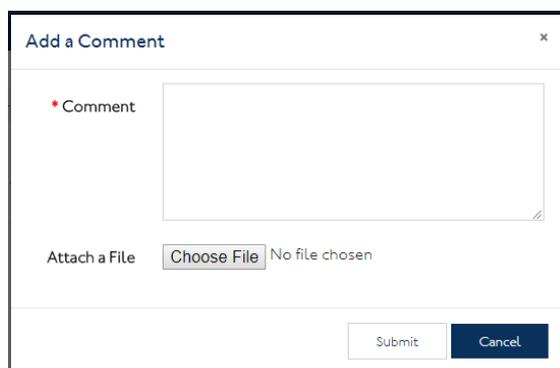


These interactions are recorded in Portal Comments. They can be created by a Customer Service or Portal user, so might be used when Customer Services need further information or you need to add extra information to the case.



To add a Portal Comment, click the Add Comment button.

This will open a new window where text can be entered and files attached.

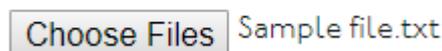


To add an attachment, click the Choose Files button under the Description field.

This will open up a new window where you can select the file to attach. If more than one file is required, hold down Ctrl on your keyboard and click each file you want to attach. Once the file(s) have been selected, click the Open button to add to the Portal Comment.

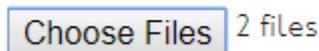
If one file is attached, the name of this file will be displayed.

Attach a File



If multiple files are attached, the number will show.

Attach a File



If you want to remove the attached file(s), click Choose Files and then click the Cancel button.

Once you have added the text and any attachments, click the Submit button.



Close a case

If you discover that the information you requested or the issue you reported is no longer required, you can advise Customer Services. Please create a Portal Comment to explain and then you can close the case by clicking the Close Case button at the bottom of the screen.



Once you have clicked this button the message “The workflow has been initiated” will be shown. This indicates the closing process has been started. The case will now be visible in the Closed Cases table (you may need to refresh).

Reopen a case

A closed case can be reopened if the enquiry or issue was not resolved. This can only be done 7 days after the case was closed.

You can reopen a case by clicking the Reopen Case button at the bottom of the screen when viewing an individual (closed) case.



You will be asked to confirm if you want to reopen the case. Click Yes to proceed or No to cancel and leave the case closed.



It may take a few moments, but when successful, you will see the message “The case has been reopened”. You will then be able to add new comments to this case. Cases reopened without explanation will be closed by Customer Services.

Cases should only be reopened if the resolution provided did not solve the issue or enquiry. If you receive an enquiry from a different vessel that is experiencing the same issue please be sure to log a different case and make note of the previous case number. This also applies to multiple different issues being reported by a single vessel.

About us

The United Kingdom Hydrographic Office is a leading provider of global marine geospatial data.

We help to inform maritime decision-making for navigation, infrastructure development and the management of marine resources.

Serving users worldwide

Our world-leading location based information is available through ADMIRALTY Maritime Data Solutions to users worldwide.

For more information, contact our global network of ADMIRALTY Chart Agents. Alternatively, contact our customer service team.



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