

Distributor case logging best practice guide

Selecting the right function / product combination



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1 Introduction

The purpose of this document is to provide guidance on the best practice when logging cases using the CS Portal.

The functions and products have been introduced in order to simplify the logging process, by providing more generalised and user friendly logging options. You begin by selecting a Function further logging options are then filtered appropriate to the action you are under taking. The intention is that those logging a case will be able to easily identify the function and product that their case falls within.

2 Functions and Sub Functions

Functions

The Portal Functions have been designed around the key actions in the 'user story', and provide end to end coverage for all potential case types a Distributor may wish to raise.

The current Portal Functions are as follows:

Log On	<i>"I am trying to log onto..."</i>
	<i>"I need a username and password for..."</i>
Order	<i>"I am trying to order..."</i>
	<i>"I ordered but did not receive..."</i>
Licence/Holdings Management	<i>"I would like to manage the following license..."</i>
	<i>"Why are the following not in my holdings?"</i>
Install	<i>"I am trying to install the product..."</i>
Activate	<i>"I am trying to Activate the Product..."</i>
Update	<i>"I am trying to Update the Product..."</i>
Use It	<i>"I am using the Product, how do I?"</i>
	<i>"I cannot access the following Service..."</i>

Sub Functions

Much like the Functions, Sub Functions are designed to allow users greater specificity regarding the type of case they wish to log.

The current Sub Functions are as follows:

Log On	User Admin
	Unlock Account / New Password
Order	Concessional Licence Request
	Existing Order / CSO Query
	Order / CSO Discrepancy
	Amend Existing Order / CSO
	Cancel Order / CSO
Licence/Holdings Management	Direct Order
	Amend Licence Details
	Vessel Transfer
	Create Vessel
	Create / Amend Shipping Company
	Holdings Query
Install	Installation Error
Activate	Activating
Update	Updating
Use It	Technical Fault
	Data Discrepancy
	Order System Support
	Suggestion

3 Case Logging Examples

Below are some examples case types and the function / sub functions they would be logged under:

Function	Sub Function	Example Case Type
Log On	User Admin	<ul style="list-style-type: none"> I would like to Create a new user... I would like to Edit an existing user... I would like to Delete user account...
	Unlock Account / New Password	<ul style="list-style-type: none"> I would like to Unlock an account... I would like to Request New Password...
Order	Concessional Licence Request	<ul style="list-style-type: none"> I would like to order a NEW Demo/Trial/Training Licence/R&D Licence... I would like to ADD To a Demo/Trial/Training Licence/R&D Licence... I would like to RENEW a Demo/Trial/Training Licence/R&D Licence...
	Existing Order / CSO Query	<ul style="list-style-type: none"> I would like to ask a question about / report an issue with an order I have already placed... I would like to ask a question about my existing CSO...
	Order / CSO Discrepancy	<ul style="list-style-type: none"> I would like to report a discrepancy with my order... I would like to report a discrepancy with my CSO...
	Amend Existing Order / CSO	<ul style="list-style-type: none"> I would like to amend an existing order... How do I amend my CSO? I have amended my CSO but there is an issue...
	Cancel Order / CSO	<ul style="list-style-type: none"> I would like to cancel an order... I would like to / how do I cancel my CSO...
	Direct Order	<ul style="list-style-type: none"> Order on behalf of Foreign Government... Misc account order... Internal customer order...
Licence/Holdings Management	Amend Licence Details	<ul style="list-style-type: none"> Please make an amendment to a licence which I am unable to complete (for example - enable direct ordering)...
	Vessel Transfer	<ul style="list-style-type: none"> Please transfer management of vessel/fleet...
	Create Vessel	<ul style="list-style-type: none"> Please add vessel to Fleet Manager...
	Create / Amend Shipping Company	<ul style="list-style-type: none"> Please create ShipCo within Fleet Manager... Amend Ship Co Name/Address details in Fleet Manager...
	Holdings Query	<ul style="list-style-type: none"> Report discrepancy in Licence Holdings on Fleet Manager... What does a vessel hold?
Install	Installation Error	<ul style="list-style-type: none"> I am attempting to install a product / data but am encountering an error...

Activate	Activating	<ul style="list-style-type: none"> I am attempting to activate a product but am encountering an error...
Update	Updating	<ul style="list-style-type: none"> What is the process to update? I am trying to update but am encountering an error...
Use It	Technical Fault	<ul style="list-style-type: none"> I am trying to use a product (other than Installation, Activation, Updating) but am receiving an error (For example - Printing an ADP Certificate)... I have downloaded a file from the FTP site but it is corrupt...
	Data Discrepancy	<ul style="list-style-type: none"> There appears to be data missing from a product (chart, ENC, Publication etc)...
	Order System Support	<ul style="list-style-type: none"> I am experiencing an unexpected issue/error within an order system (Fleet Manager, APOS, POD)...
	Suggestion	<ul style="list-style-type: none"> I would like to suggest an improvement to an ADMIRALTY Product or Service...

4 Possible Function / Product Combinations

The table below provides a visual overview of the possible Function/Product combinations when logging a new case via the CS Customer Portal.

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United Kingdom Hydrographic Office

Admiralty Way, Taunton, Somerset
TA1 2DN, United Kingdom
Telephone +44 (0)1823 484444
customerservices@ukho.gov.uk
gov.uk/ukho

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