Clarify web support user guide

Document change log

Rev	Revision Date	Description	Author	Document Location
01	24.01.2012	Revised for MICROS Australia standards	Mohammad Islam	MICROS Internal
02	17.02.2012	Added New Zealand web link	Mohammad Islam	MICROS Internal

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Overview

Case Management, the Internet-based interface to MICROS-Fidelio's Global Support System "Clarify", allows you to conveniently make a request for support (create a case), track the progress of an existing case and add feedback as it is being researched, and reference previous cases.

This document provides instructions on how to log in and navigate the Case Management screens. The following instructions will guide you through the process of creating a new case. MICROS Australia support staff are immediately notified of new cases.

Customer responsibilities

- Customer to advise whom will be the primary contact at the customer site for any issues / improper usage feedback.
- Customer to advise whom will be allowed to log / update case information. (discrete list)
- Customer to advise once employee leaves the company and should be removed from discrete list.

MICROS responsibilities

- Add/remove/maintain the site and contact details in Clarify as advised by the customer
- Setup the necessary login and access, and provide the customer contact with this login information.

Case Management workflow

The workflow of logging a case via case management is:

- Search for an existing case on this problem using the 'Query Cases' feature – it may be possible that someone else from your organization may have already opened a case for this issue
- Create a new case using the 'New Case' feature
- Add all necessary information on the notes section.

NOTE: Please log one case per query only – If you have multiple problems please enter them in separate cases.

Logging in to Case Management

If you already have a user ID

1. Enter the MICROS Australia support website www.micros.com.au/support or www.micros.co.nz then click the ‘Login’ button:

2. Enter your Case Management username and password. The password is case sensitive.
3. Select your time zone (if unsure check at http://www.greenwichmeantime.com)
4. Click the ‘Logon’ button to login:

5. Once successfully logged in, you will see the welcome screen, as shown below:

The navigation bar on the left contains:

Welcome: The current screen displayed above
My Open Cases: Displays all open cases linked to your contact
My Profile: To change contact, site or password details
Query Cases: To search on current or past (closed) cases
New Case: To create a new case (please search existing cases before opening a new case)
Sales Enquiry: To request sales related product information
Logout: To logout of SelfService

If you do not have a user ID

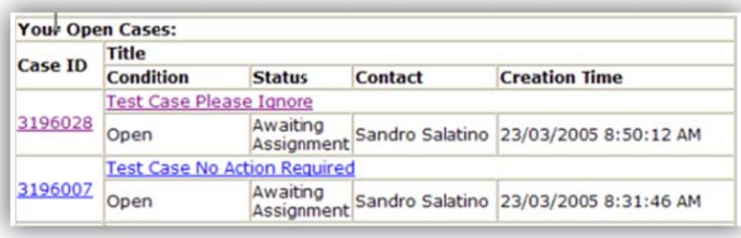
If you do have an account, please register directly via http://usc.micros.com/casemanagement/register.asp

If you forgot your password

If you have forgotten the login password, you can click the link "I forgot my password". You will be prompted to enter your User name. The password will be e-mailed to the e-mail address registered to your account.

My open cases

If you like to view all open cases, you can click ‘My Open Cases’, this will display all open cases linked to your contact that are logged into SelfService.



Your Open Cases:				
Case ID	Title			
	Condition	Status	Contact	Creation Time
3196028	Test Case Please Ignore			
	Open	Awaiting Assignment	Sandro Salatino	23/03/2005 8:50:12 AM
3196007	Test Case No Action Required			
	Open	Awaiting Assignment	Sandro Salatino	23/03/2005 8:31:46 AM

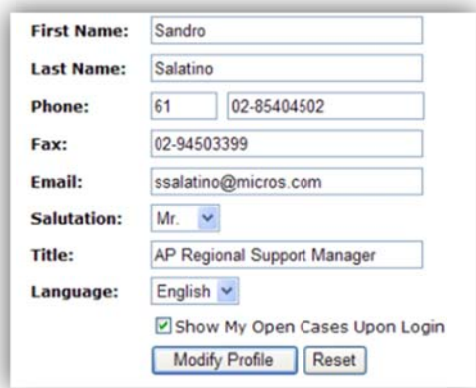
Clicking on the Case ID or the case title will open up the case detail Screen. See page 13 for more information.

My profile

From the profile link, you can update your name, telephone, fax, email, and set a preference to automatically display all open cases upon each login.

Modify your profile

If you like to change the profile details, please update your details and click “Modify Profile”



Modify your site

If the primary site has changed or more sites need to be added, or the site information is incorrect and needs updating. Please submit a new case, identify the incorrect data, and include the new or updated information in the case note. We will contact you shortly to verify and update the information.

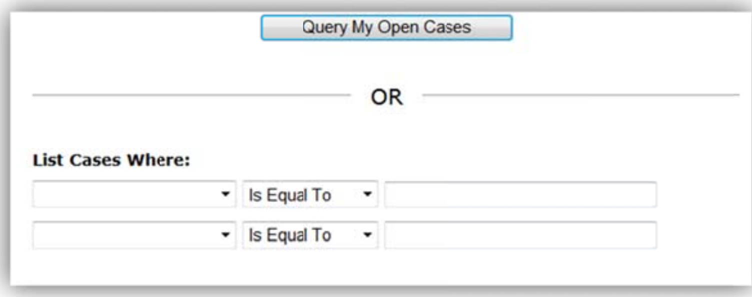
Change your password

You can also change the login password of your account using the ‘Change Password’ option.

How to query cases

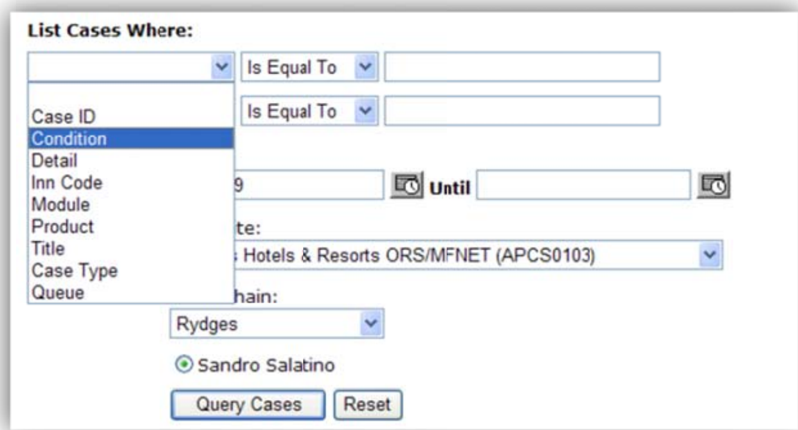
The Query Cases screen is accessible from the ‘Query Cases’ link in the left menu. The ‘Query Cases’ screen allows you to either do a quick query for your open cases, or do a narrower search for cases that meet some specific criteria or are at a particular site or chain.

A quick query for your open cases may be performed by pressing the ‘Query My Open Cases’ button in the upper portion of the screen.

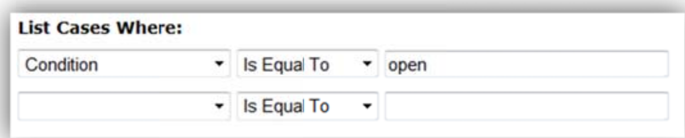


The lower portion of the screen allows you to choose filter fields to perform a more specific query for your cases or cases at one of your sites.

You can narrow down you search by adding a filter on a specific field by choosing the field from the leftmost dropdown list in one of the first two rows of the query section. The available fields to filter against are ‘Case ID’, ‘Condition’, ‘Detail’, ‘House Code’, ‘Module’, ‘Product’ and ‘Title’.



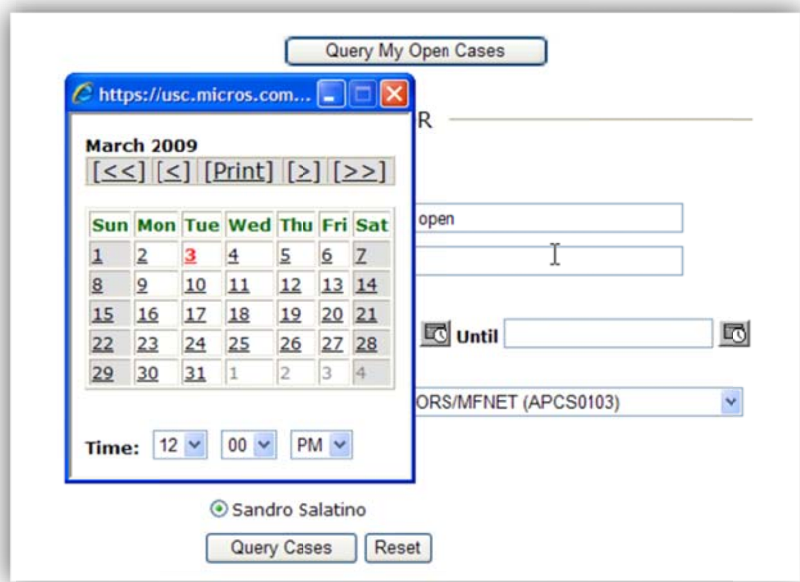
Once you selected the filter type you can choose a filter type from the middle drop down list. The available filter types are ‘Starts With’, ‘Ends With’, ‘Contains’, and ‘Is Equal To’.



In the third box, please enter the criteria to filter against. The value entered in this box is not case sensitive.

To further narrow the search, you may repeat the process for the second row of filter fields. The criteria entered in the two rows of boxes will be joined with and in the query.

The query can be narrowed down to cases created in a specific date range by specifying a date value in the *From* and/or *Until* fields. By default, the 'From' field will be populated with the date 2 days prior to the current date.

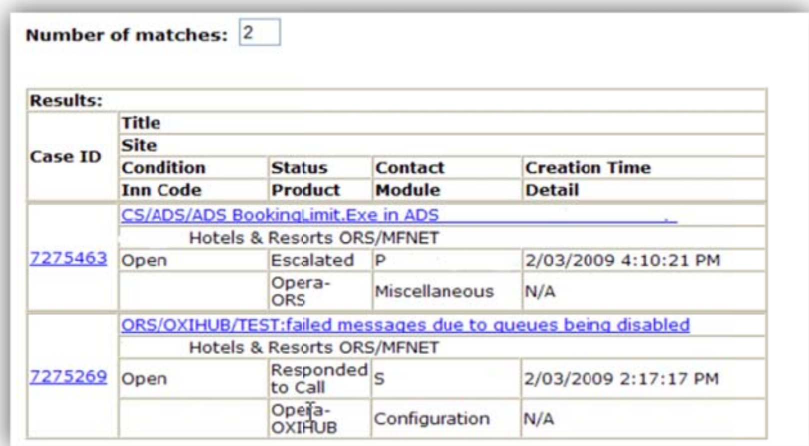


To enter or modify a date value in one of these fields, you may either manually enter the date value in the correct 'M/D/YYYY' format, or they may click the calendar graphic to the right of the text box. Doing so will post a Calendar page from which will allow you to select a date.

The last part of the query indicates whether cases should be displayed for a particular site, a particular chain, or all cases assigned to that contact.

- To limit results to a particular site, you need to click the 'At Site' radio button and choose the appropriate site from the list.
- To limit results to a particular chain, you will click the 'In Chain' radio button and choose the appropriate chain from the list. If a chain query is performed, only cases that are at one of your sites will be displayed.

Once all filter criteria have been entered, you will need to press the 'Query Cases' button to display the results. The total number of cases found is displayed in a text box at the top of the screen.



Number of matches: 2

Results:

Case ID	Title / Site / Condition / Inn Code	Status / Product	Contact / Module	Creation Time / Detail
7275463	CS/ADS/ADS BookingLimit.Exe in ADS			
	Hotels & Resorts ORS/MFNET			
	Open	Escalated	P	2/03/2009 4:10:21 PM
		Opera-ORS	Miscellaneous	N/A
7275269	ORS/OXIHUB/TEST:failed messages due to queues being disabled			
	Hotels & Resorts ORS/MFNET			
	Open	Responded to Call	S	2/03/2009 2:17:17 PM
		Opera-OXIHUB	Configuration	N/A

A subset of the case information is displayed for each case found. The information displayed is:

Information Title	Description
Case ID	The unique ID number for each case
Title	Title provides a brief description of the case. This must follow the "Case Title Standards" as detailed in section "New Case".
Site	Name of Site that logged the call
Condition	The Current Condition of the case Open: Case is open Open-Dispatch: Case is open and dispatched to a queue Open-Returned: Case is open and returned to a queue Open-Temporary: Case is open and temporarily taken out of a queue Closed: Case is Close
Status	Current status of the case
Contact	Site Contact who logged the call
Creation time	Date and time case was created
House code	Not used at this stage
Product	Name of the Product the case is logged for
Module	Name of the Module the case is logged for
Detail	Detail of Module case was logged for (Option field)

The *Case ID* and *Title* fields are hyperlinked to the Case Detail page; this means you can click either of these to view case details.

NOTE: The fcSelfService application is not designed to be used as a reporting tool or to display Mass Case Data on the screen. Should your query time out, try to narrow down the selected search criteria. MICROS Support Services offers automatic electronic distribution of case activity reporting to its customer. If you require specific reports, please contact our support team for more information.

How to create a new case

To create a new case, you need to take the following steps:

1. Open the new case window
2. Select the site for which you want to enter the case
3. Add description of case into title field
4. Define case type from drop down list of values
5. Select case priority from drop down list of values
6. Select business group, product line, module and detai
7. Enter all information related the problem in the notes field and click create case

Each of these steps are explained below:

1. Open new case window

Select *'New Case'* from the left menu.

2. Select a site

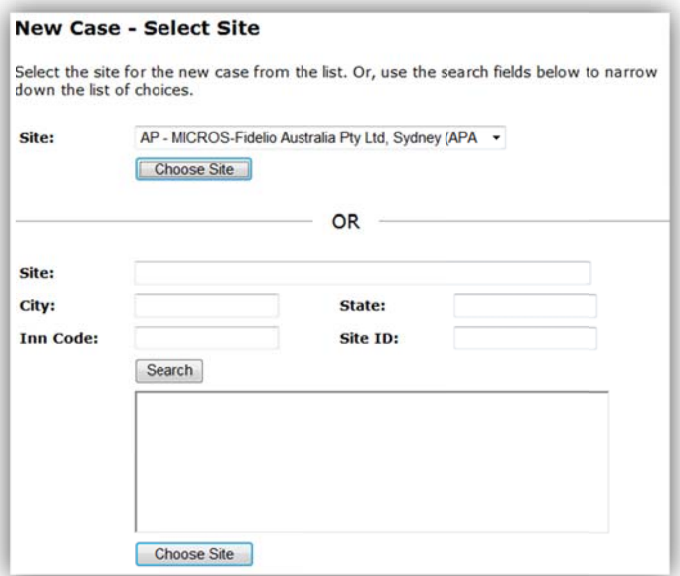
The first step in the process is to choose a site for the case from the 'New Case - Select Site' window

The top portion of this screen features a list of all of the contact's related sites. The contact's primary site is listed first, with the remaining sites listed in alphabetical order by Site Name.

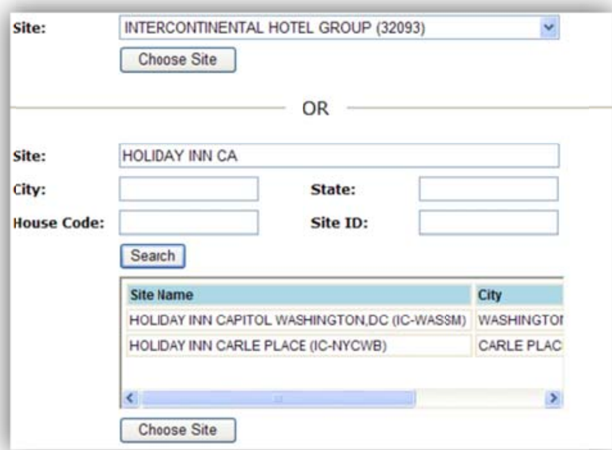
You can proceed by selecting the desired site from the list and pressing the 'Choose Site' button located directly beneath the drop down box.

If you are linked to a large number of sites, you may search for a specific site by using the search filter boxes in the lower portion of the screen.

All searches are pre-filtered to exclude sites that you are not associated with. To search for a site, you will need to enter the search criteria in one or more of the boxes and press the Search button.



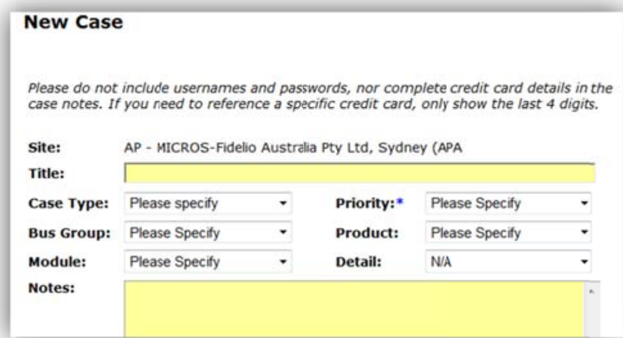
The search criteria are treated as 'starts with filters'. For example, if you entered "HOLIDAY INN CA" in the 'Site' field, they would see a listing of all of their sites with a site name that starts with that phrase.



To locate a single site, enter a complete value in a unique field such as 'Site ID'. To choose a site from the grid, you will click the appropriate row once to highlight it and then press the 'Choose Site' button.

3. Add case title

The chosen site for the case is displayed at the top of the screen.



Type in the title for your case using the format below. You can enter up to 70 characters in this field. The title should be brief but meaningful.

Product	**Title Format – Examples; All case Titles have to start with one of the bold abbreviation below**
OPERA PMS	**OPERA/PMS**/Night audit reports will not reprint after audit completes
OPERA S&C	**OPERA/SC**/Merging does not merge bookings in another property
OPERA ORS	**OPERA/ORS**/Reservation does not get send to PMS
Opera OCIS	**OPERA/OCIS**/Membership points get not calculated correctly
Opera OWS	**OPERA/OWS**/Profile does not get updated with modified details
Opera QMS	**OPERA/QMS**/workorder.fmx time allows the user to enter before creation
Opera OXI	OPERA/OXI/Giving Error Ora 04020 when logging in to the OXI Application
Opera IFC	**OPERA/IFC**/Voice Messages get send to the wrong room
Fidelio FO V6	**FO6/**Credit Card Check Code YY does not consider approved amount upon check out
Fidelio FO V7	**FO7/**Discrepancy for Arrivals between Procedure Company and Profile History Tab
Fidelio S&C V6	**SC**/How do I update rate codes from S&C into FO once a new profile has been created?
Fidelio Back Office	**BO**/Bank Transfers (EFT) Unable to approve Bank Transfer
Fidelio F&B	**FB/**DB/Error msg "Out of env space" when trying to get into fb_mnt to do a batch reorganization
Interfaces	**IFC7**/Phones are not turning on and off, unable to delete records from ifc_act_table. **IFC6**/Keys are not working after the first night
MICROS POS	**RES3000**/Cash Management does not split checks correctly **Simphony**/ Workstation freezing **9700**/RMC freezes when running EOD **8700**/Kitchen chits not printing **3700**/No Reset on End of Month
Central Systems CRS, CIS, WBE	**CS/FTCRS**/Data Format on the CIS screen is incorrect **CS/IFC**/Profiles entitlement do not upload to CIS
Revenue Management System - TLP	**TLP**/Availability in TLP is out of synch.
Materials Control	**MC**/8.68/STORE/INVENTORY/Metaframe option does not create all requested Inventories
Vision Lasata	**Vision**/XL/Request Frequent Flyer Export fields to be added to opera serduct
MyFidelio.net	**MFNET**/Reservations not downloading
MICROS Payment Gateway	**MPG**/Credit card batch is not settling

4. Define case type

Please select a case type to reflect the nature of reported issue. For example, to log a software error, select ‘SW:Problem/Error’

5. Select case priority

Enter the priority code for the issue; please use the following guidelines to assign a priority.

Priority	Description	Example
1	Major System Disruption. (Contact Support Centre by telephone.)	A major disruption in business-critical system operability or functionality, server crash or total system failure
2	Severe System Disruption (Contact Support Centre by telephone).	A severe disruption in business-critical functionality that does not impact the entire system such as: • Significant number of terminals unable to perform or post transactions • Loss of ability to perform payment functions. • Total Loss of reporting (local or centralized) • Loss of all re mote printing • Failure to reset totals or complete EOD/SOD
3	Single Function Failure	A minor disruption in operability or functionality that does not impact the entire system such as: • Timekeeping issue • Isolated remote printing failure • Isolated workstation/terminal failure
4	Minor / Procedural Issue or Question	Procedural or non-critical issues such as: • Programming or configuration related questions • Questions relating to functionality or operations • Formatting or cosmetic problems
5	Customization / Programming	• Billable remote support or significant programming or configuration assistance requiring scheduling of dedicated support resources • Any non-covered or out-of-scope issue

6. Select business group, product, module and detail field

Please select the appropriate value for each field below.
Bus Group: Business Group issue occurred in. For example; Point of Sale select POS, Property Management System, select PMS
Product: Product Line issue occurred in.
Module: Module within Product issue occurred in.
Detail: Area of Module issue occurred in.

NOTE: Please enter descriptive notes on the note field. The more detail provided, the faster and more efficiently we will be able to resolve your problem. The minimum information required to log a case is listed on Appendix I of this document.

When finished, press the Create Case button. After the case has been created, the Case Detail screen displays all of details about the newly created case. Press the Reset button at any time to clear the Notes and Title fields and reset all of the dropdown lists to *'Please Specify’*.

Case detail screen

The case detail screen displays all information available for a case. You can view or add notes, change the severity, add attachments or even close the case. The case history section lists all communication that has been logged against this case.

Activity: Type of activity
Date: Time Stamp of activity
Who: Site Contact or MF employee who performed the activity
Description: Summary of activity

The entire activity notes can be displayed by clicking on the **+** to the left of the activity type.

Additional options will be displayed in the menu bar once you are in the case detail Screen

Log Notes: To add additional information related to the case
Change Severity: To change the severity you give this case
Add Attachment: To add attachments related to this case
Close Case: To close the case

How to log notes or change severity

You can use the Log Notes option to provide supplemental information or to give us feedback about the action you took and the results. Here you can enter any additional information related to this case into the “Notes” field and/or change the severity that you give this issue and click submit. The owner of the case in the MICROS office will be automatically notified about changes.

Steps to add notes or change severity of a case

1. Open case via my open cases, query cases or new case
2. Click on log notes in menu bar
3. Enter text into notes field
4. Click on arrow to the right of new severity
5. Select severity form the drop down list of values
6. Click submit

NOTE: You cannot add notes to a case that is closed. If you need a case reopened, you must contact the MICROS Australia office.

How to add an attachment

You can attach accompanying documentation and files (i.e. screen shots, log files, and report output) to the case.

Steps to attach a file to a case

1. Open case via my open cases, query cases or new case
2. Click on add attachment in menu bar
3. Enter description of file into title field
4. Click on browse… and locate the file you want to attach on your PC or network
5. Click attach to case

Case ID: The unique ID number for each case
Title: Brief description of the file
Attachment: Path where the file is located on your PC or network

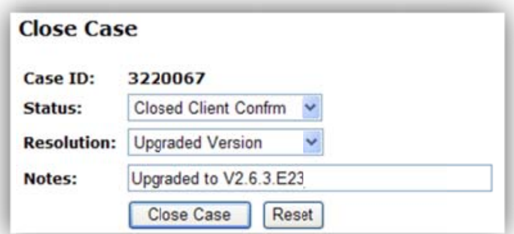
NOTE: There is a limit of 2 MB per file and files must be compressed (zipped). It is not possible to attach .EXE, .COM, .BAD, ASP.

How to close a case

Once a case has been resolved you can close it by yourself.

Steps to close a case

1. Open case via my open cases or query cases
2. Click on close case in menu bar
3. Select closing status from the drop down list of values
4. Select resolution type from the drop down list of values
5. Add closing notes
6. Click close case



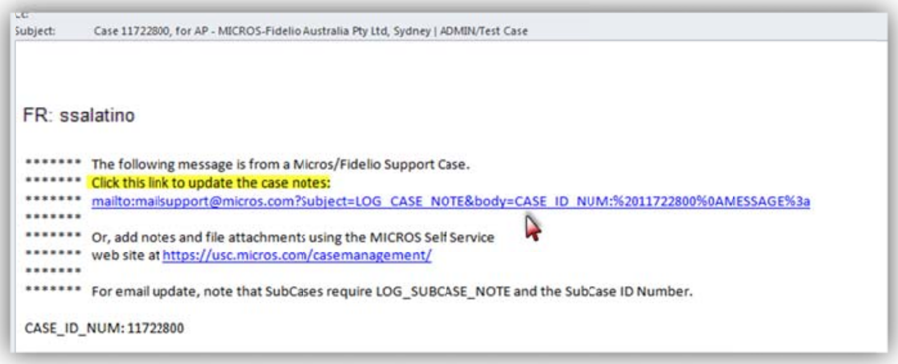
Case ID: The unique ID number for each case
Status: Closing Status
Resolution: Resolution Type
Notes: Summary of what resolved the issue

How to logout

The logout option in the menu bar will bring you back to the login screen:

How to respond to a Clarify email

Once you have submitted a case, you might receive progress update emails that are sent directly out of Clarify. A sample email is shown below:


Subject: Case 11722800, for AP - MICROS-Fidelio Australia Pty Ltd, Sydney | ADMIN/Test Case

FR: ssalatino

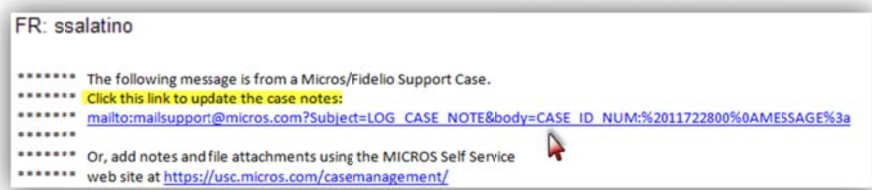
******* The following message is from a Micros/Fidelio Support Case.
******* Click this link to update the case notes:
******* mailto:mailsupport@micros.com?Subject=LOG_CASE_NOTE&body=CASE_ID_NUM:%2011722800%0AMESSAGE%3a
****
******* Or, add notes and file attachments using the MICROS Self Service
******* web site at https://usc.micros.com/casemanagement/
****
******* For email update, note that SubCases require LOG_SUBCASE_NOTE and the SubCase ID Number.

CASE_ID_NUM: 11722800

You can reply to this email in a way that the case will be updated automatically with your new notes.

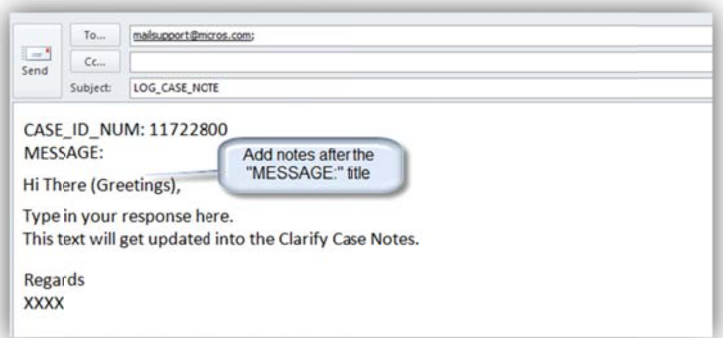
Steps on how to respond to Clarify emails:

1. Click the link provided on the email


FR: ssalatino

******* The following message is from a Micros/Fidelio Support Case.
******* Click this link to update the case notes:
******* mailto:mailsupport@micros.com?Subject=LOG_CASE_NOTE&body=CASE_ID_NUM:%2011722800%0AMESSAGE%3a
****
******* Or, add notes and file attachments using the MICROS Self Service
******* web site at https://usc.micros.com/casemanagement/

2. This will open up a new email window on your default email application. See below:


Send
To... mailsupport@micros.com;
Cc...
Subject: LOG_CASE_NOTE

CASE_ID_NUM: 11722800
MESSAGE:
Hi There (Greetings),
Type in your response here.
This text will get updated into the Clarify Case Notes.

Regards
XXXX

3. Ensure the format is ‘plain text’ (not ‘rich text’ or HTML)
4. Add your notes as a new line after the ‘MESSAGE:’ title
5. Then click send

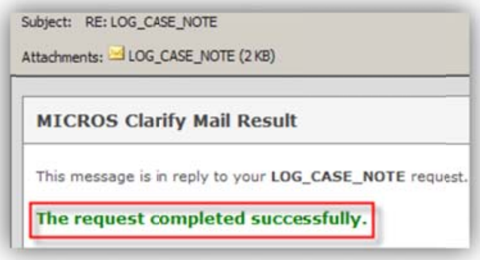
NOTE:

- Reply email needs to be addressed to mailsupport@micros.com,
- Subject line must only contain: LOG_CASE_NOTE
- In the mail body, remove all except the two lines below. Add any notes after the ‘MESSAGE:’ tag:
  CASE_ID_NUM: 4241888 (or the case id)
  MESSAGE:
- There should also be no attachment or mail footer (containing your contact details) at the bottom of the email.

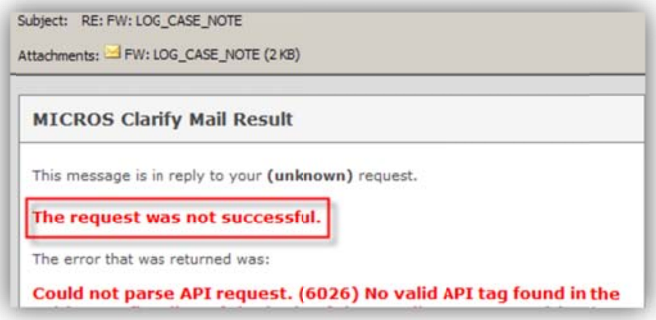
Email update confirmation

Every time you send or reply to an email in Clarify, you will receive an automated confirmation as to whether your notes were added to the case or not.

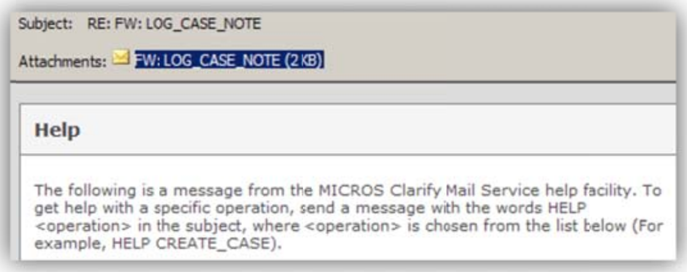
If successful, you will receive the following:



If unsuccessful, you will receive an email with error notes:

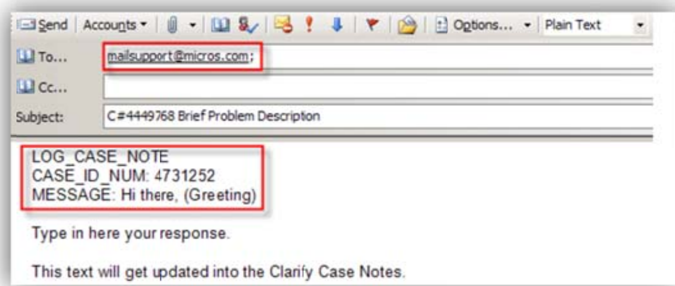


For unsuccessful messages, you will also receive an additional email with "help" options:



Should you get the log error, please review the mail format as per above and try again. If problems persist, please forward us (APREGCLARIFYPM@micros.com) the email reply from clarify and we will review.

NOTE: The subject does not require the LOG_CASE_NOTE if this is added in the email body. First line of the Body must be LOG_CASE_NOTE. The other tags CASE_ID_NUM: and MESSAGE: are still required, as previously. Example:



Appendix 1 - Case escalation template

Minimum information required to log a case to MICROS Support

Reported by:

Direct contact:

Email contact:

Application version:

Environment:

Supporting attachments:

Questions

1. **Is the issue happening in single/multiple or all chain property?** ***[compulsory]***
   NB. If this is affecting single property, incident must be logged under the property; not under head office.

2. **Is this happening after a recent upgrade/installation?** ***[compulsory]***
   a. *If so, when did the upgrade/installation take place [if applicable]*
   b. *Who performed the upgrade/install [if applicable]*

3. **Is the issue reproducible in a test environment** ***[compulsory]***
   a. *If so can this be accessed by support and how [if applicable]*

4. **Has the issue occurred once only, inconsistently or consistently?** ***[compulsory]***
   a. *If consistently, how often/when [if applicable]*

5. **If this is a reporting problem, please provide the following** ***[compulsory]***
   a. *Report Name*
   b. *An example of the anomaly*
   c. *If the reports are not showing any data, please attach the RTA log*

6. **Detailed Problem Description, with specific examples** ***[compulsory]***

7. **Steps to Reproduce** ***[compulsory]***

8. **Details of the research/troubleshooting done so far to resolve the problem** ***[compulsory]***

9. **Attachment Details** ***[if applicable]***

10. **Workaround available (yes/no)** ***[compulsory]***
    a. *If yes, please provide details.*

11. **2nd Point of Contact (name, phone / email)** ***[compulsory]***
