Europe, Africa and the Middle East

MICROS FIDELIO EUROPE, AFRICA AND THE MIDDLE EAST

# Case Management / fcSelf Service Customer User Guide

micros FIDELIO
Europe, Africa and the Middle East

# FCSELFSERVICE/CASE MANAGEMENT CUSTOMER USER GUIDE

Version 2.0.

This replaces and supersedes all previous versions of this document. Please ensure that you always refer to the most recent version of this manual. This may be downloaded at www.micros.fidelio.net -> download center.

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For queries regarding Case Management / fcSelfService, please contact eame-clarify@micros.com .

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Europe, Africa and the Middle East

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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. Your local Micros-Fidelio Support staffs are immediately notified of new cases; triage based on priority and researches them accordingly.

## 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**
- **Customer to advise once employee leaves the company**

Any communication in with regard to the above (with reference to sites within the EAME region only) should be sent to eame-clarify@micros.com .

## MICROS-FIDELIO 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 notes

**IMPORTANT**

**One Problem per Case**
**If you have multiple problems please enter them in separate cases.**

## WHICH LANGUAGE TO USE

Generally, you are free to use the local language of the area where the hotel is located for communication via Case Management. Should your organisation belong to an international hotel chain, please verify this with your own corporate head office.

**IMPORTANT**

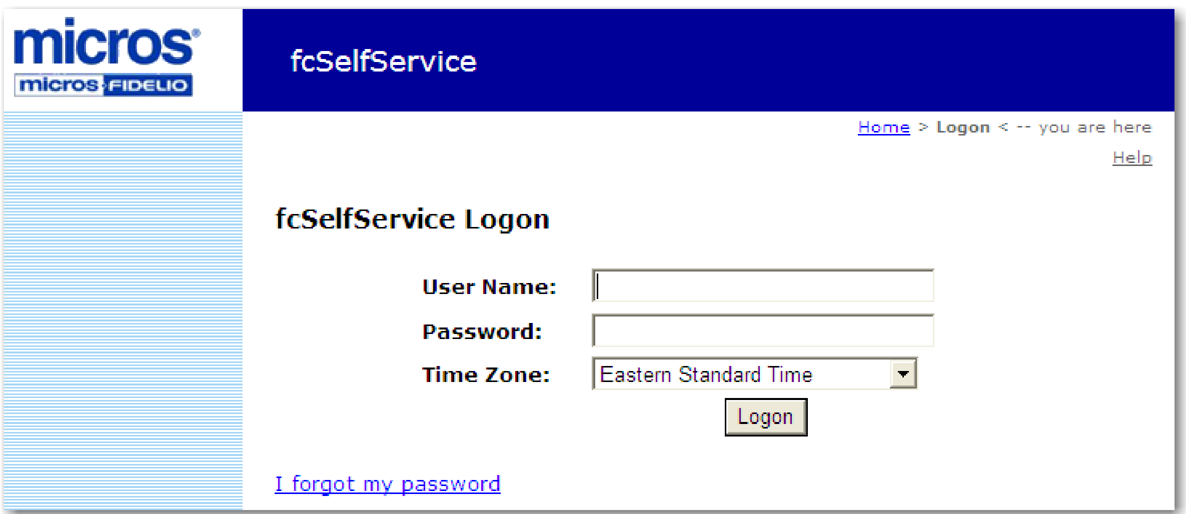
**Do not use any (non English) “Special characters”**
**for example “ä, ö, ß” etc. when logging via Clarify.**

# LOGGING INTO CASE MANAGEMENT

To log in to Case Management, do the following:

1. Connect to the Internet through your Internet Service Provider.
2. Enter the MICROS-Fidelio Website
   www.micros-fidelio.net -> Customer Service -> Case Management
3. or go direct to fcSelfService via https://usc.micros.com/casemanagement
4. Enter your Case Management username and password. The password is case sensitive.
5. Select your Time Zone (If not sure check at http://wwp.greenwichmeantime.com )

Click the Logon button to log in.




## IF YOU DO NOT HAVE A USER ID

If the user does not have an account, please contact your local support or account manager.

## IF YOU FORGOT YOUR PASSWORD

If the user has forgotten the login password, he or she can click the link "I forgot my password"
The user will be prompted to enter the account User name. The password will be e-mailed to the e-mail address registered to that user name.

# THE WELCOME SCREEN


## THE NAVIGATION BAR

| | |
|---|---|
| **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 – someone else may have entered this case) |
| **Sales Query:** | To request sales related product information |
| **Logout:** | To logout of fcSelfService |

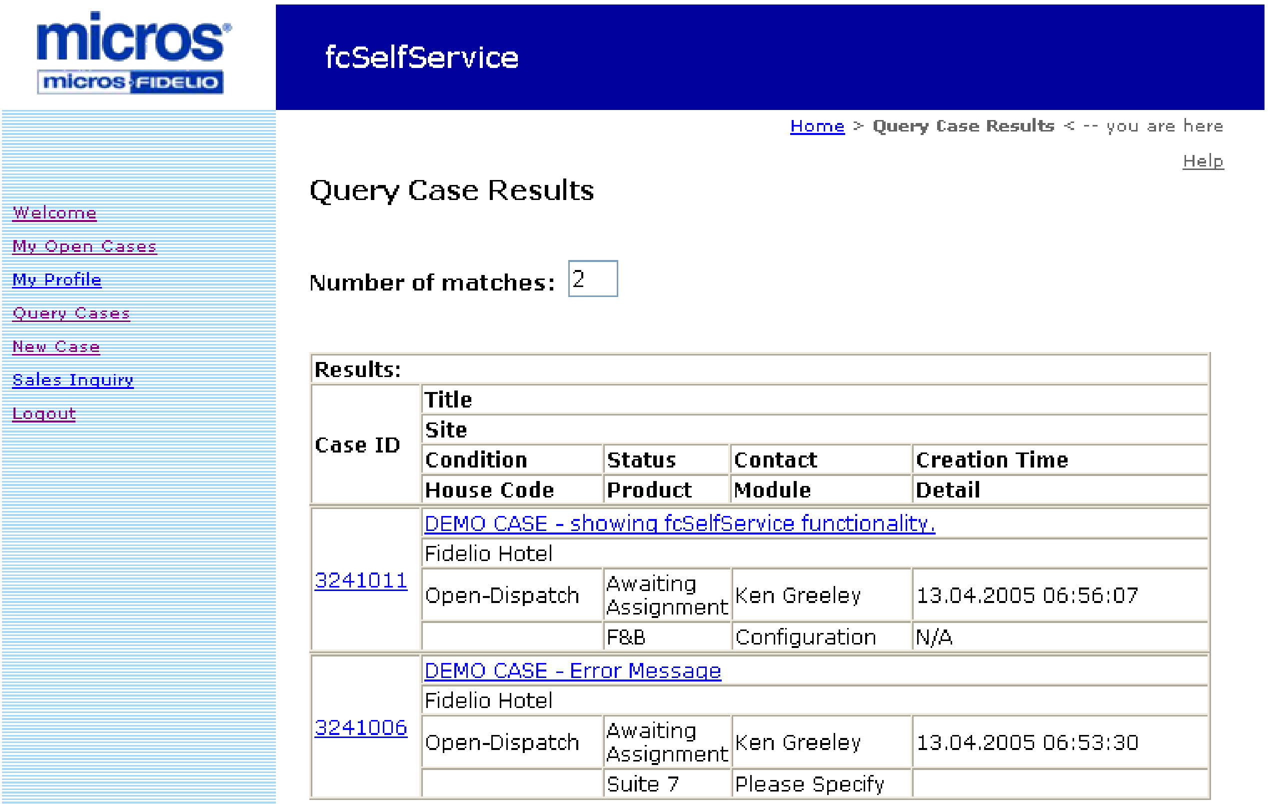
Each of these options are explained in detail on the following pages

**IMPORTANT**

**If the application is idle for more then 20 Minutes, you will be logged out.**
**Selecting any option will bring up the login screen and you must login again.**

# MY OPEN CASES

Displays all open cases linked to the contact that is logged into fcSelfService.



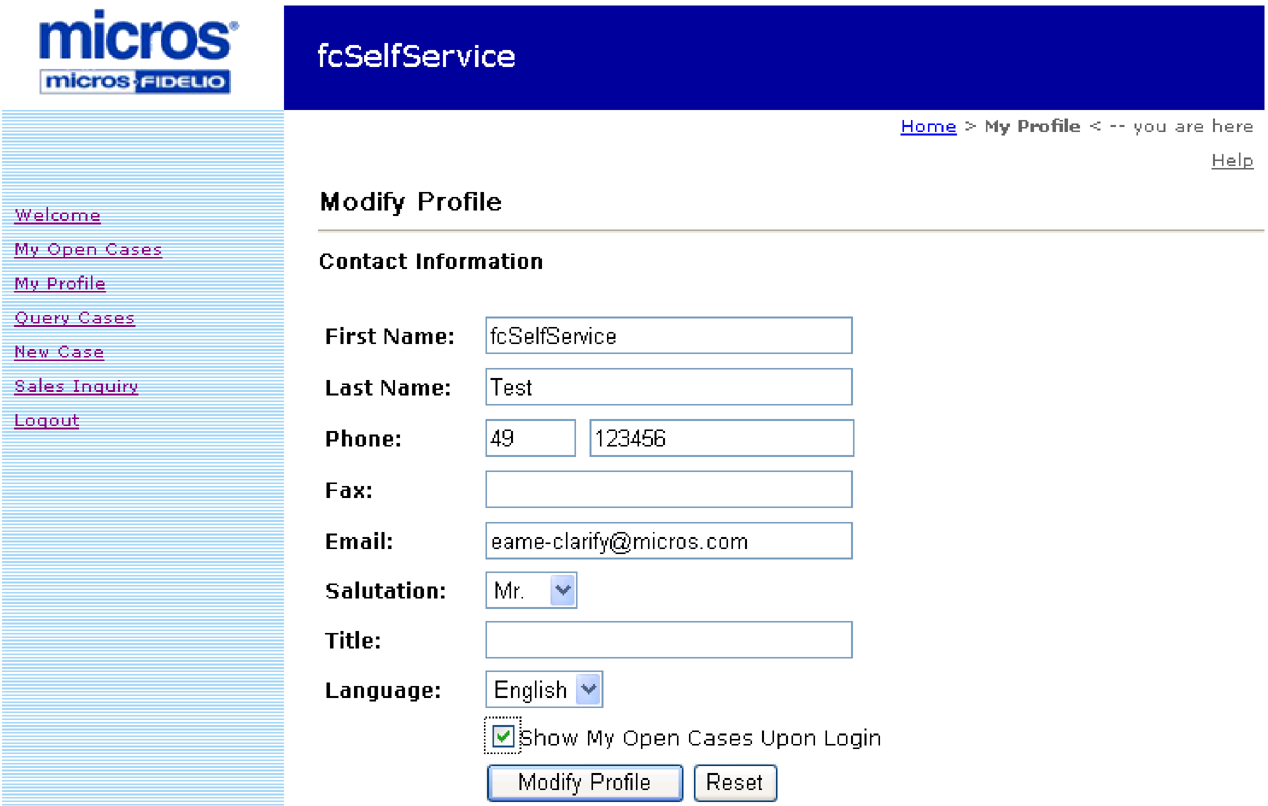

Clicking on the Case ID or the Case Title will open up the Case Detail Screen. See the chapter about the Case Detail screen for more information.

**NOTE: Using the "My Open Cases" function only shows cases where you yourself are the actual contact. This is not necessarily the situation for all cases open for your property/properties.**

**Therefore, if you wish to see all (open) cases for the site in which you work, please use the "Query Cases" function. See page 14 for further details.**

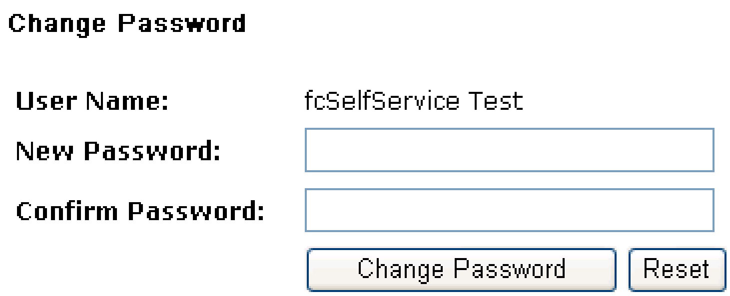
# MY PROFILE

From the Profile link, a user can update their Name, Telephone, Fax, E-mail, and set a preference to automatically display their Open cases upon each login:




## CHANGE PASSWORD

The user can also change the login password to the account



**Change Password**

| | |
|---|---|
| **User Name:** | fcSelfService Test |
| **New Password:** | |
| **Confirm Password:** | |

Change Password | Reset

## PRIMARY SITE INFORMATION

If your primary site has changed or more sites need to be added, you can click the Modify Site button. This will create a new case and your local MF Support Office will be notified of the change request.

**Primary Site Information**

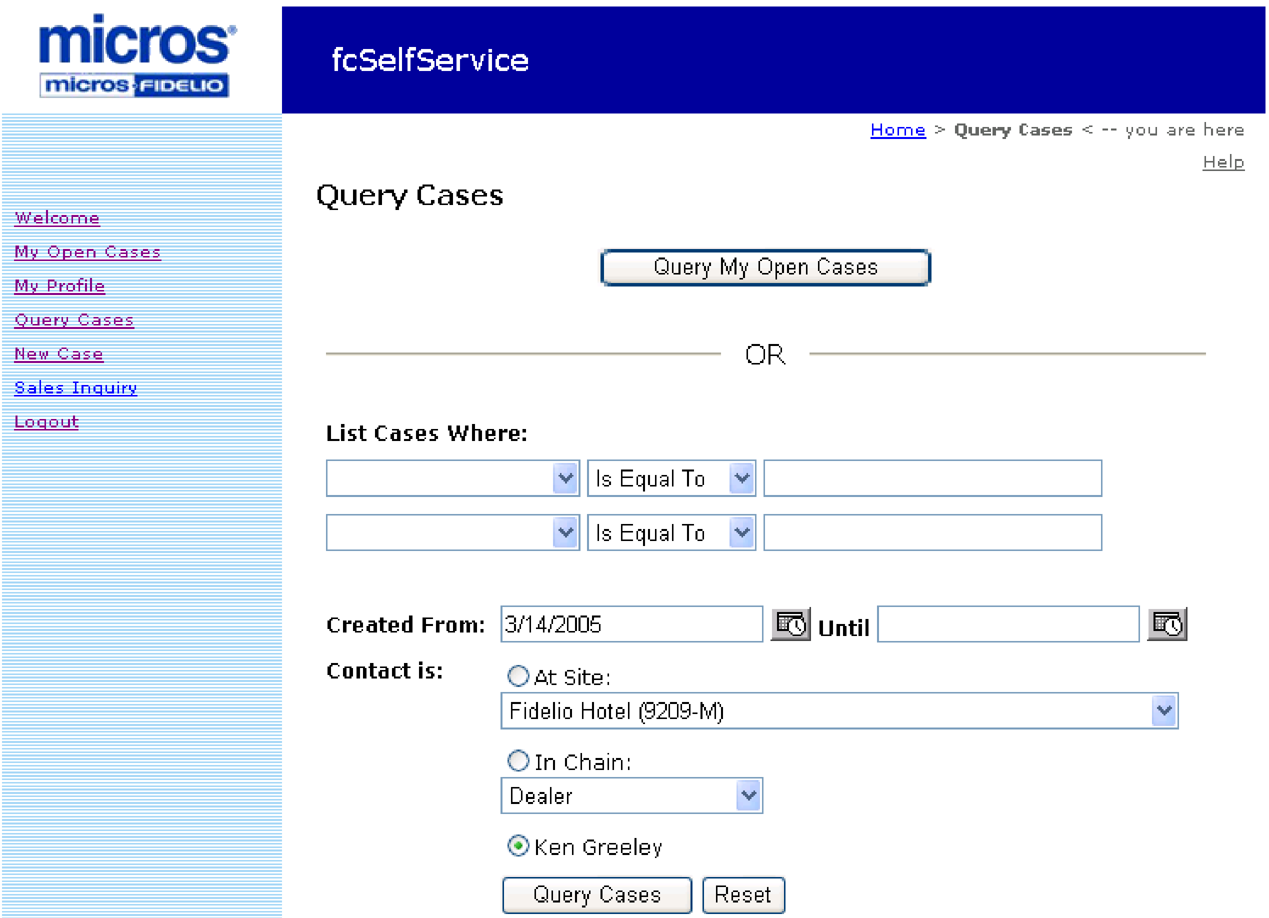
| | |
|---|---|
| **Site Name:** | Micros-Fidelio Software Deutschland GmbH |
| **Address:** | Europadamm 4-6 |
| **Address 2:** | |
| **City:** | NEUSS |
| **State:** | GERMANY |
| **Zipcode:** | 41460 |
| **Country:** | Germany |

If any of this Site information is incorrect or needs updating, please click the **Modify Site** button, and we will contact you shortly to verify and update the information.

Modify Site

# HOW TO QUERY CASES

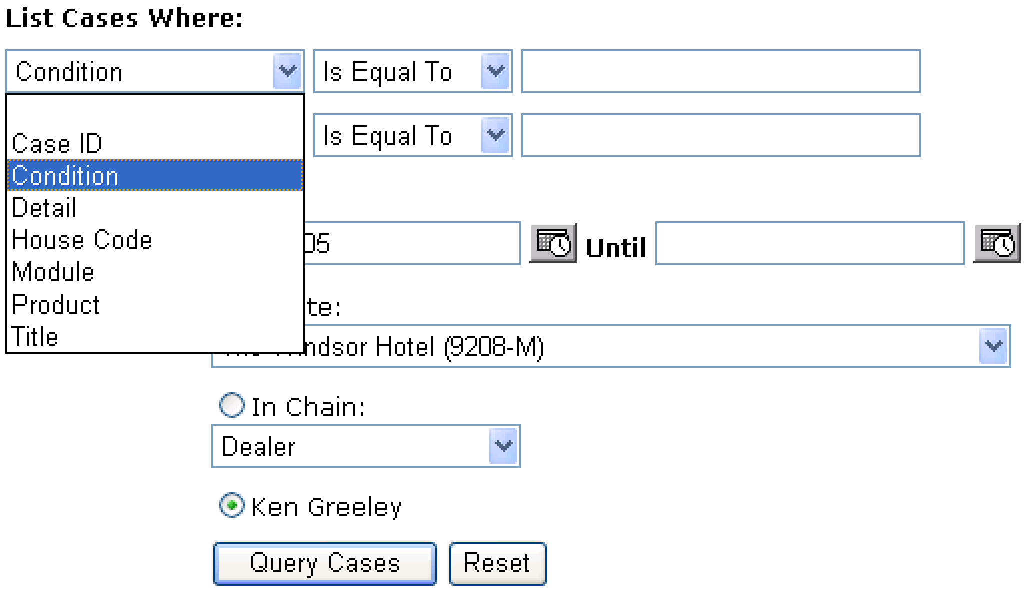
The **Query Cases** screen is accessible from the *Query Cases* link in the left menu.  The Query Cases screen allows you to either do a quick query for your open cases, or do a narrower search for cases that meet some specific criteria or are at a particular site or chain.




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 their cases or cases at one of their sites.

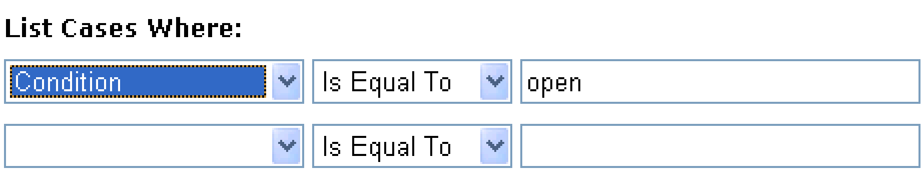
A filter on a specific field may be performed by choosing the field from the leftmost dropdown list in one of the first two rows of the query section.




The available fields to filter against are “Case ID”, “Condition”, “Detail”, “House Code”, “Module”, “Product” and “Title”.

Once the filter field is selected, a filter type may be chosen from the middle drop down list. The available filter types are “Starts With”, “Ends With”, “Contains”, and “Is Equal To”.

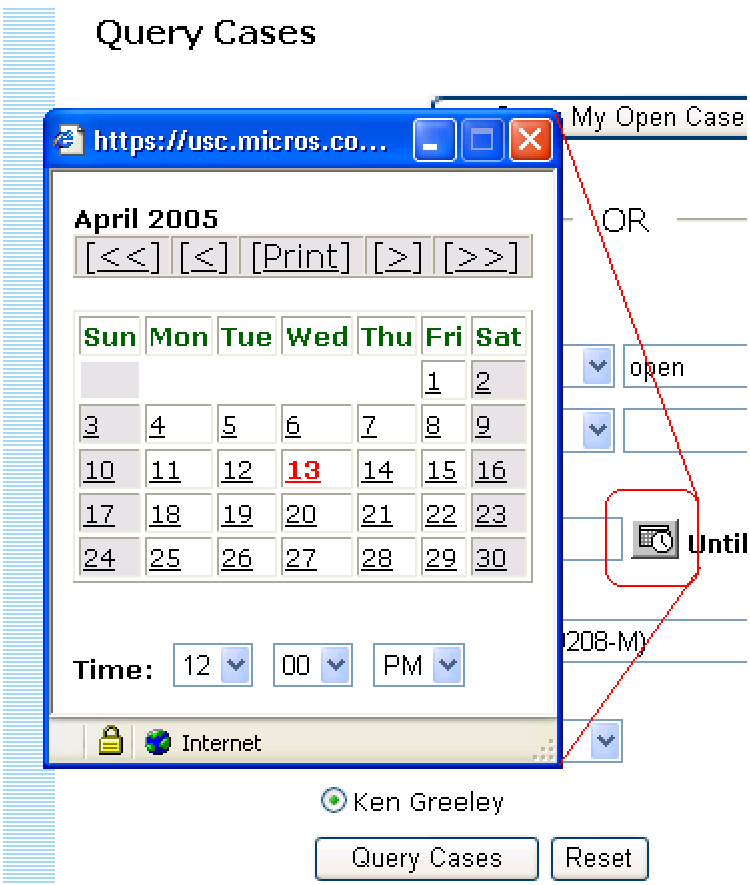
In the third box, the criteria to filter against are entered.  The value entered in this box is not case sensitive.




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 30 days prior to the current date.

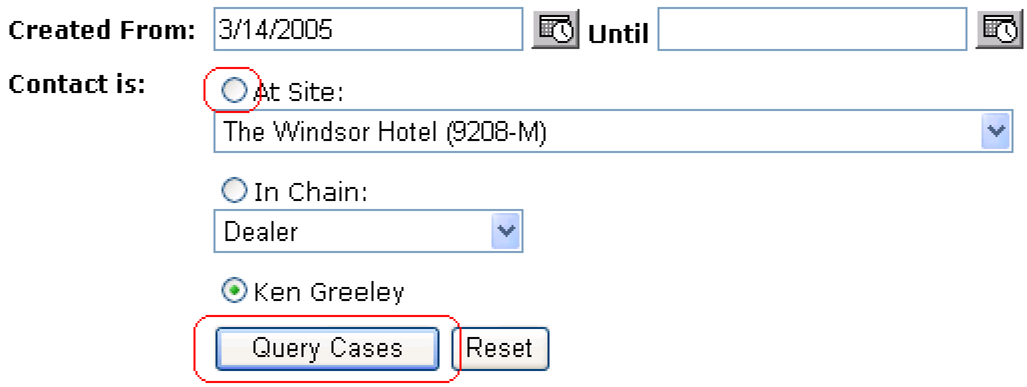
To enter or modify a date value in one of these fields, you may either manually enter the date value in the correct "M/D/YYYY" format, or they may click the calendar graphic to the right of the text box. Doing so will post a Calendar page from which a date may be selected.




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.

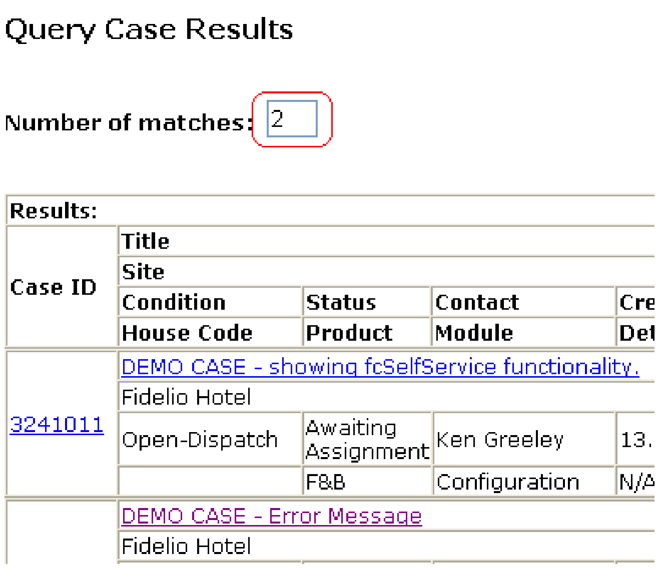
To limit results to a particular site, you will click the At Site radio button and choose the appropriate site from the list.

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 press the Query Cases button to display the results.

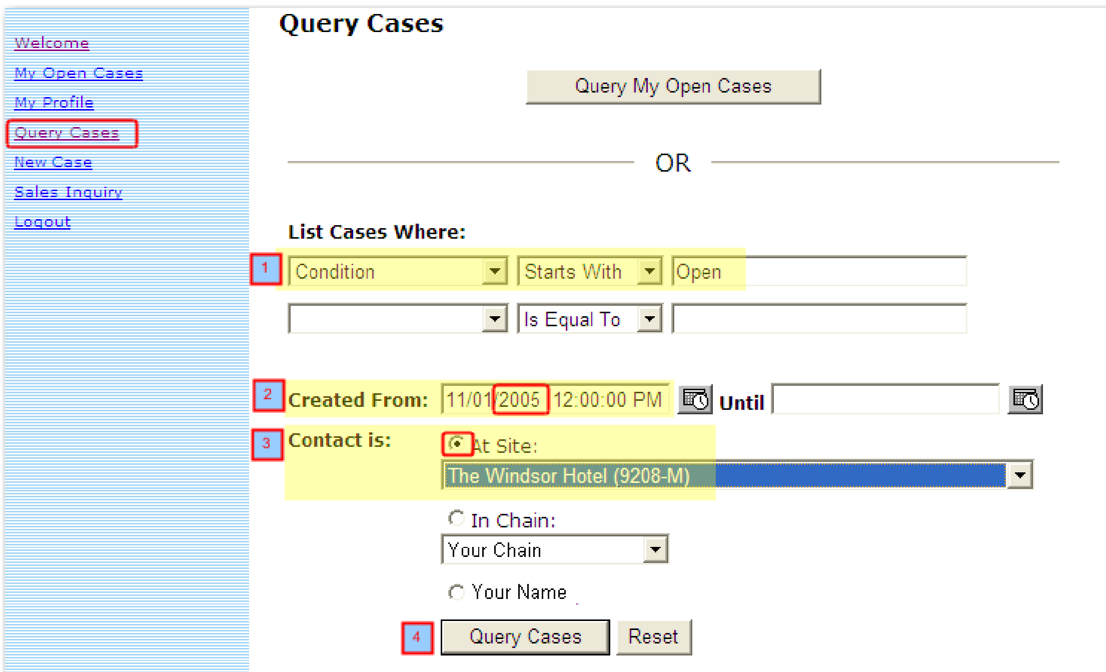
The Query Case Results page lists the cases that met the search criteria specified in the Query Cases screen.




The total number of cases found is displayed in a text box at the top of the screen.

# SAMPLE CASE QUERY FOR ONE OR MULTIPLE SITES

The easiest way to view all (Open) Cases for your site is by using the “Query Cases” function, and setting up your query as follows:




[1] To view open cases only, set the **Condition** to “Starts With” “Open” (do not use “Is Equal to”). To view all cases (open and closed), leave this field blank. Querying all cases may take quite some time to return a list of cases, depending on the dates selected.

[2] Change the “**Created From**” date to a date far enough back in the past that would include the specific cases you are looking for. One year back from today’s date is generally a good starting point. You may leave the “Until” field blank.

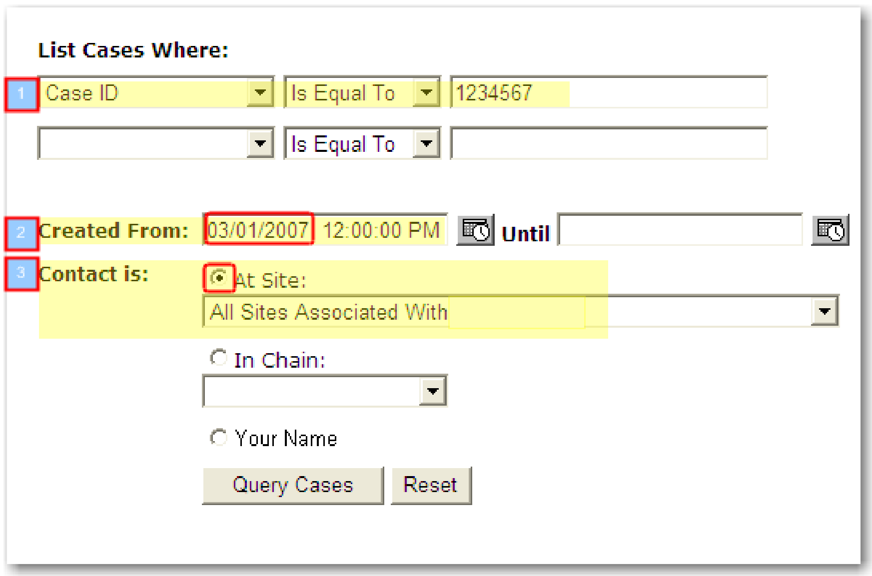
[3] Select the particular site you wish to query. Make sure the radio-button “At Site” is active.

If you wish to query all sites with which you have been linked, set the “**At Site**” value to “*All Sites Associated with ‘Your User’*”.


[4] When all values have been set, click on “**Query Cases**”

## SEARCHING FOR A SPECIFIC CASE ID

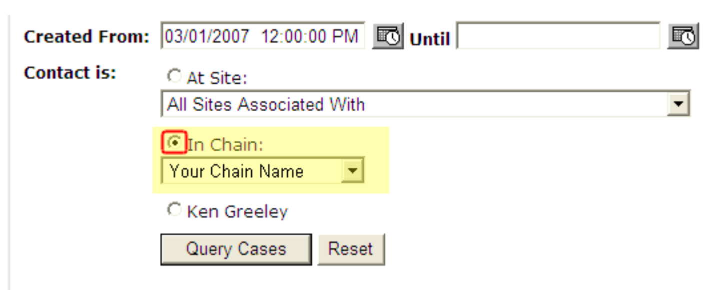
To search for a specific case ID, please remember that you must also complete the query in the same manner as described above (i.e. you must specify the case ID, the date range must include the date where the case was created, and you must also select the correct site)




## SEARCHING FOR ALL CASES FROM A CHAIN

If you use the option to select (open) cases from a particular chain, please note that this will only list cases for sites to which you are linked (i.e. which appear in the site list of values directly above).

This search field is only necessary if you are a contact for multiple chains. Otherwise, please use the “At Site” function as described above (for all sites).



## CASE STATUS INFORMATION

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

**Case ID:** The unique ID number for each case

**Title:** Title provides a brief description of the case. This must follow the CaseTitle standards as detailed in section "New Case"

**Site:** Name of Site who has 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:** Product case was logged for

**Module:** Module case was logged for

**Detail:** Detail of Module case was logged for (Optional)

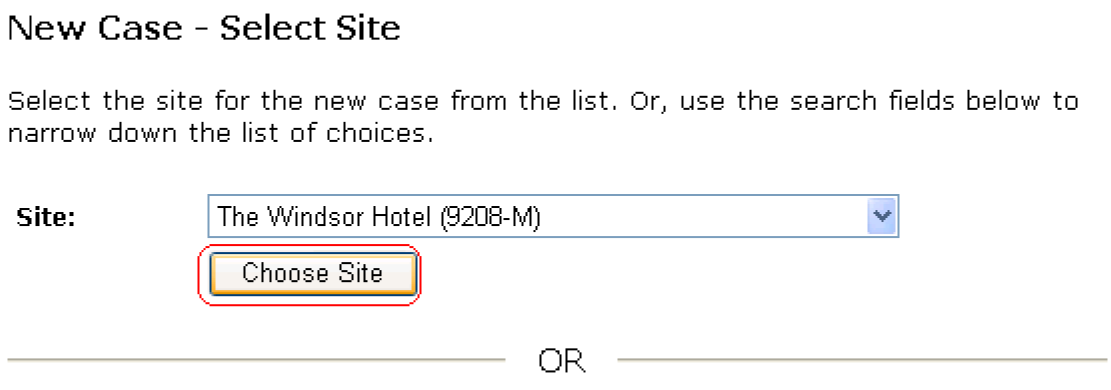
# HOW TO ENTER A NEW CASE

To create a new case, you select *New Case* from the left menu. 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.

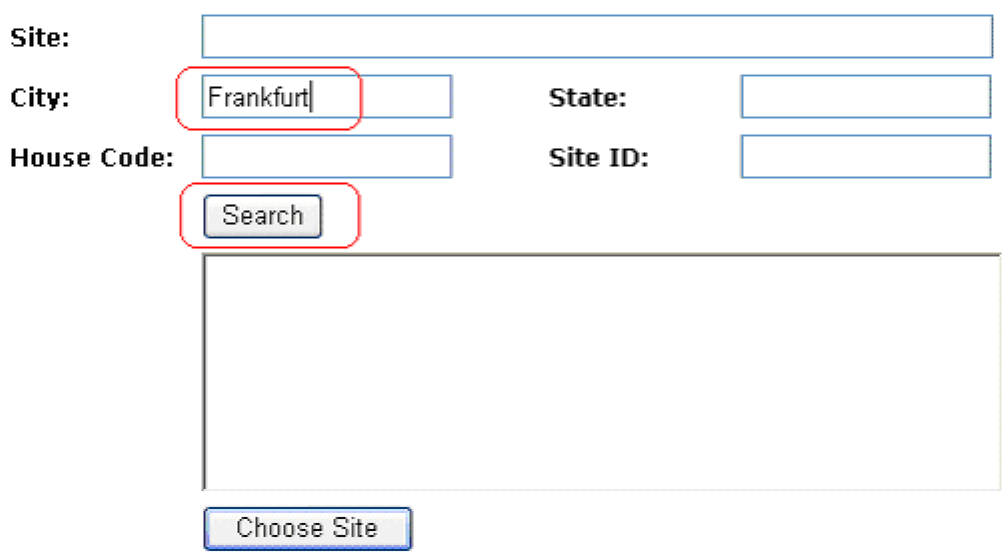
Proceed by selecting the desired site from the list and pressing the *Choose Site* button located directly beneath the drop down box.

## SELECTING THE CORRECT SITE




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.

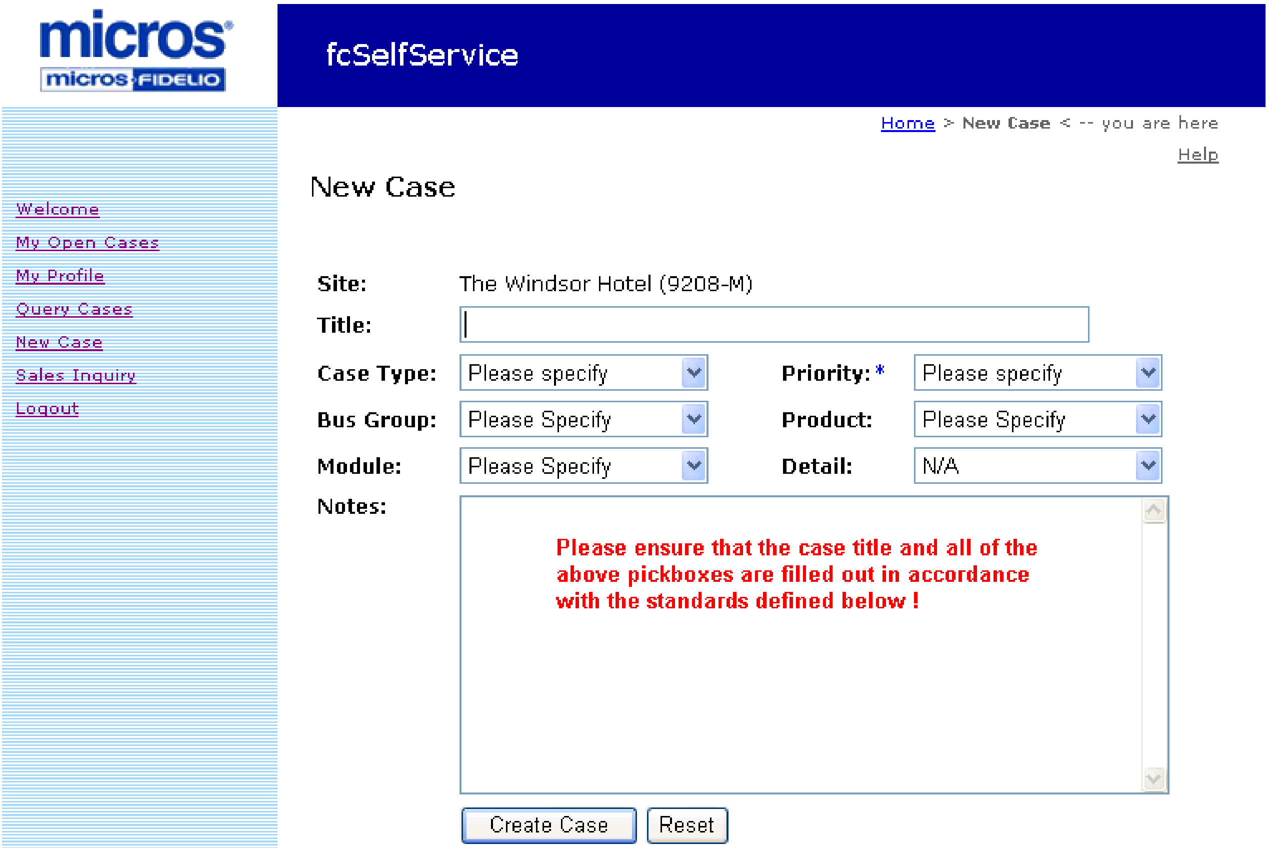
All searches are pre-filtered to exclude sites that you are not associated with. To search for a site, you will enter the search criteria in one or more of the boxes and press the ***Search*** button.




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 choose a site from the grid, you will click the appropriate row once to highlight it and then press the *Choose Site* button. After a Site has been chosen, the New Case page will be presented.

## CASE LOGGING STANDARDS




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

**Identifying the Problem**

**Title:** 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

The table on the following page will give you a basic example of how the title should look. Each Micros-Fidelio product has a specific case title standard which is specific to the needs of the relevant support group. Non adherence to this title convention may result in a delay in responding to or handling your case.

| ***Product*** | **Title Format – Examples** |
|---|---|
| | **All Case Titles have to start with one of the bold abbreviations below, followed by a brief summary of the problem. Please use as much detail as possible in this description.** |
| *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 |
| *Fidelio EMS* | **EMS/** |
| *Interfaces* | **IFC7/**Phones are not turning on and off, unable to delete records from ifc_act_table.<br>**IFC6/**Keys are not working after the first night |
| *Micros POS* | **RES3000/**Cash Management does not split checks correctly<br>**9700/**RMC freezes when running EOD<br>**8700/**Kitchen chits not printing<br>**3700/**No Reset on End of Month<br>**2700/**Kitchen chits not printing |
| *Central Systems CRS, CIS, WBE* | **CS/FTCRS/**Data Format on the CIS screen is incorrect<br>**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 |

For any product not mentioned above, please start the case title with an abbreviation of the product name followed by the version number and build/patch/release number if available. This should be followed by a brief but detailed description of the problem, as shown above.

### PICK BOXES

**Case Type:** Nature of reported issue

**Priority:** Priority Codes are specified at the bottom of the New Case Screen.

Priority 1 should only be chosen for cases where there is a complete system down. If you are experiencing a Priority 1 issue, you **must** also report this case by telephone to your local support office to ensure that no valuable time is lost in returning your site to service.

**Bus Group:** Business Group issue occurred in:

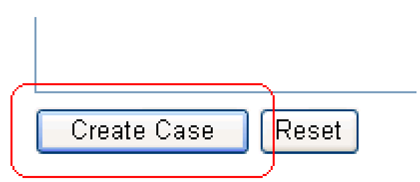
| | |
|---|---|
| CS | Central Systems |
| PMS | Property Management Systems (usually front office products) |
| POS | Point of Sale (usually restaurant products) |
| Healthcare | Not used in this region. |

**Product:** Product Line issue occurred in
**Module:** Module within Product issue occurred in
**Detail:** Area of Module issue occurred in (only necessary for some products)

**Notes:** Enter descriptive notes. The more detail provided, the faster and more efficiently we will be able to resolve your problem. The minimum information required is listed below:

1. Callers Name
2. Direct Telephone
3. Version
4. Problem Description
5. How to recreate - Step by Step
   Please provide details how the issue can be recreated or describe the steps the user performed, just before the problem appeared.
   Please use navigational steps. Cashiering->Cashier Functions->Currency Exchange->Enter Password->Select Profile.
6. When was this problem first noticed. Were there any events around that time which could be linked to the problem? Examples: Upgrade; New Hardware; Additional Software

When finished, press the *Create Case* button. Press the *Reset* button at any time to clear the *Notes* and *Title* fields and reset all of the dropdown lists to “Please Specify”.




After the case has been created, the **Case Detail** screen displays all of details about the newly created case

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## THE CASE DETAIL SCREEN

The Case Detail screen displays all information available for a case. This is where you can view or add notes, change the severity, add attachments or even close the case

Click on “My Open Cases” (see above) and select the case which you wish to work on.


| | | | |
|---|---|---|---|
| Title: | DEMO CASE - showing fcSelfService functionality. | | |
| Case Type: | HW: Server | Condition: | Open-Dispatch |
| Severity: | Please specify | Status: | Awaiting Assignment |
| Priority: | 3 | Owner: | WebSupport Daemon |
| Product: | F&B | Module: | Configuration |
| Detail: | N/A | House Code: | |
| Contact: | Ken Greeley | | |
| Phone: | 02131137522 | | |
| Site: | Fidelio Hotel | | |
| Address: | test | | |
| City,State,Zip: | test, CA | | |

**Case History:**

| | Activity: | Date: | Who: | Description: |
|---|---|---|---|---|
| + | Notes | 4/13/2005 6:56:07 am | websupport | *** Performed by contact: Ken Greeley, 02131137522 A further example of case notes. |
| + | Notes | 4/13/2005 10:28:17 am | tmueller | Please send us more information. |

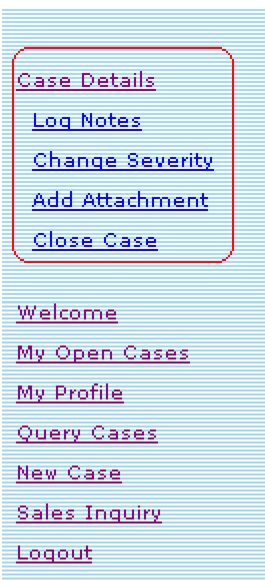
The Case History section lists all communication that has been logged against this case.

| | |
|---|---|
| **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.

| **Case History:** | | | | |
|---|---|---|---|---|
| | Activity: | Date: | Who: | Description: |
| − | Notes | 4/13/2005 6:56:07 am | websupport | *** Performed by contact: Ken Greeley, 02131137522<br>A further example of case notes. |
| *** 4/13/2005 6:56:07 am websupport : Notes<br>*** Performed by contact: Ken Greeley, 02131137522<br>A further example of case notes. | | | | |
| + | Notes | 4/13/2005 10:28:17 am | tmueller | Please send us more information. |

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

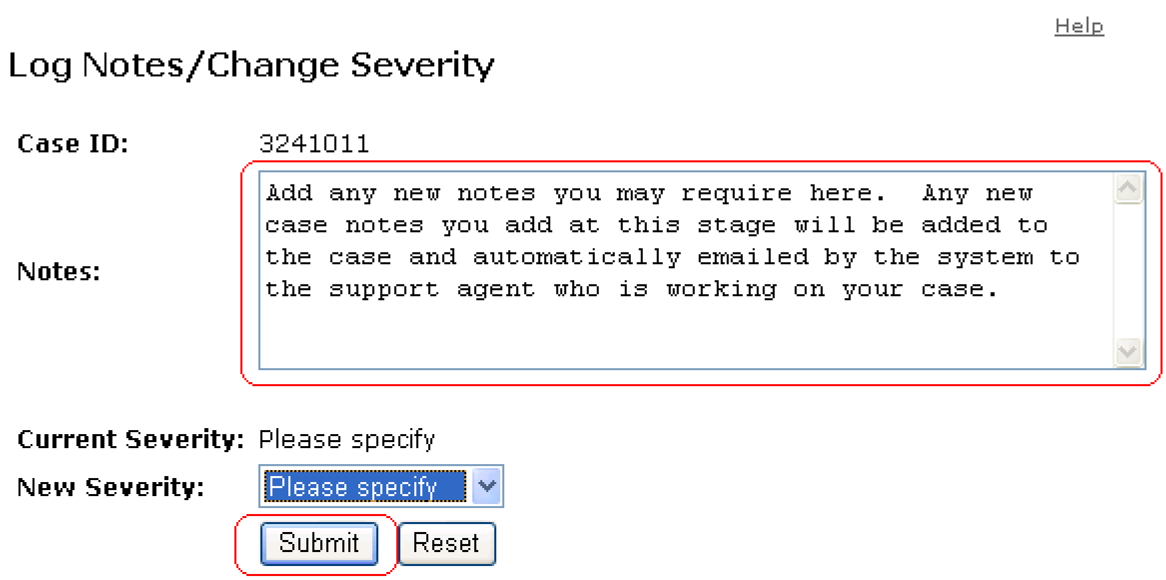
You can use the Log Notes option to provide supplemental information or to give us feedback about the action you took and the results.

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-Fidelio Supporting Office will be automatically notified about any changes.

**Note: You cannot add notes to a case that is closed. If you need a case reopened, you must contact your supporting MICROS-Fidelio office or open a new case for this issue and make reference to the original case ID.**

Steps to add notes or change severity of a case

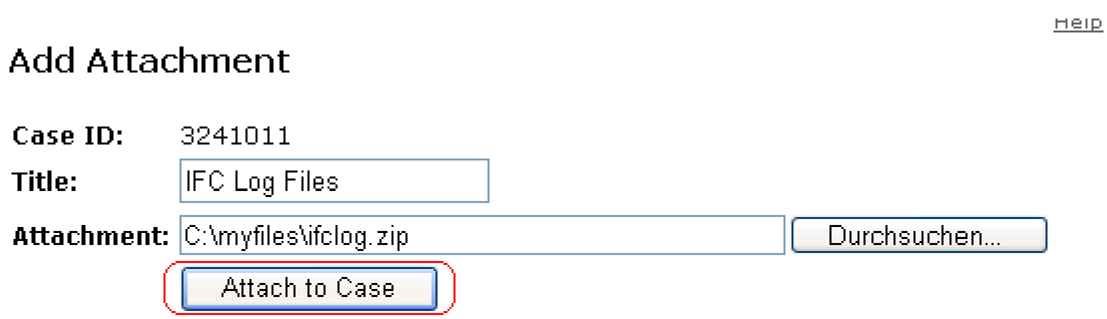
1. Open case via My Open Cases, Query Cases or New Case
2. Click on Log Notes in Menu Bar
3. Enter text into Notes field
4. Click on arrow to the right of New Severity
5. Select Severity form the drop down list of values
6. Click Submit



## CASE ATTACHMENTS

Accompanying documentation and files (i.e. Screen Shots, Log Files, and Report Output) can be linked to the case.

**Notes: There is a limitation of 1 MB per file. We recommend to compress (zip) all files.**



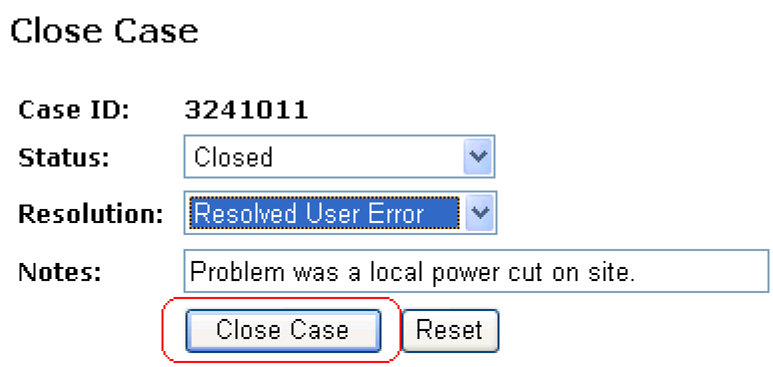

**Case ID:** The unique ID number for each case
**Title:** Brief description of the case
**Attachment:** Path where the file is located on your PC or network

### 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 CLOSURE

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




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

### 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

## SALES INQUIRY

This function is still under development and will be activated at a later stage.

Eventually, this link will post a request form, pre-formatted with the user's data.
The purpose will be to request new product information. When the Submit button
is pressed, a new case will be created and auto dispatched to the Sales Representatives
of your Supporting MF office.

## HOW TO LOG OUT

The Logout option in the Menu Bar will bring you back to the Login screen.