



CR Portal Customer Support Guide

Version 1.2, August 2019



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CR Portal Support

CR Portal support is managed by logging a ticket via our JIRA Service Desk. This enables users to log a service request or submit a question directly with the CR Portal support team.

To set up JIRA Logins for your new CR Portal Implementation

Please fill out the form in Appendix A to nominate the users who require access to our JIRA Service Desk. The form then needs to be provided to your illion CR Portal Project Manager.

Once a JIRA login is created for those users - they will receive an email with their JIRA login credentials together with the URL to access the JIRA Service Desk.

What if I didn't receive a JIRA login when CR Portal was implemented?

If you would like to receive access to our JIRA Service Desk, please ask a staff member who has a JIRA login to create a ticket requesting access for you (instructions provided on page 8 of this document).

If your Company has not been provided with any login details for our JIRA Service Desk, please contact the CR Portal support team on the number provided below.

How do I log a support ticket?

Refer to the instructions on page **Error! Bookmark not defined.** (next page).

CR Portal Support contact details:

JIRA Service Desk: <https://servicedesk.illion.com.au>

Phone: +61 3 9840 6631



JIRA Service Desk Instructions

How to log a Support Ticket

To report a CR Portal issue, log a service request via our JIRA Service Desk:

1. Login to the illion JIRA Service Desk at <https://servicedesk.illion.com.au> using the login credentials provided by illion.

Login

Username
xxxxxxx

Password
.....

Log in

Keep me logged in

2. Click on the 'I have a problem' link:

Illion Decisioning Customer Support

Welcome! You can raise a Illion Decisioning Customer Support request from the options provided.

What do you need help with?

General

Login and Accounts

Data Extract

I have a problem
Report an error or a bug

I have a question
Get assistance for general Illion Decisioning questions

A form will display. All fields are mandatory with the exception of fields marked with *(optional)*.

3. Enter a summary of the issue into the 'Summary field'. The text entered into this field will become the 'heading' of the ticket. For example; 'Cannot manually submit a batch'.



Summary The text entered here will become the 'heading' of the ticket

Customer Reference Number (optional)

Phone Number

Environment Click in the 'Environment' field and select CR Portal.

Impact

4. Enter your direct contact number into the 'Phone Number' field. This assists the support team to contact you directly if required.
5. **IMPORTANT:** click on the Environment field and select 'CR Portal':

Phone Number

Environment

- Production
- Client Test
- Reporting
- CR Portal**
- JIRA Service Desk
- System Test
- SIT

6. Select or provide appropriate information from the following mandatory fields:
 - Impact
 - Description and Additional Information
 - Steps to Reproduce
7. If applicable, you can also provide information in the remaining optional fields.
8. Click on the 'Create' button located at the bottom of the form:

Create Cancel

Your ticket will submit, and a summary of the information you provided will be displayed on the screen.

9. You will receive a confirmation email from the Support team advising they have received your service request, quoting a reference number. The Support team will be in contact either by updating the ticket (you will receive an email displaying any information added to the ticket), or by calling you directly.

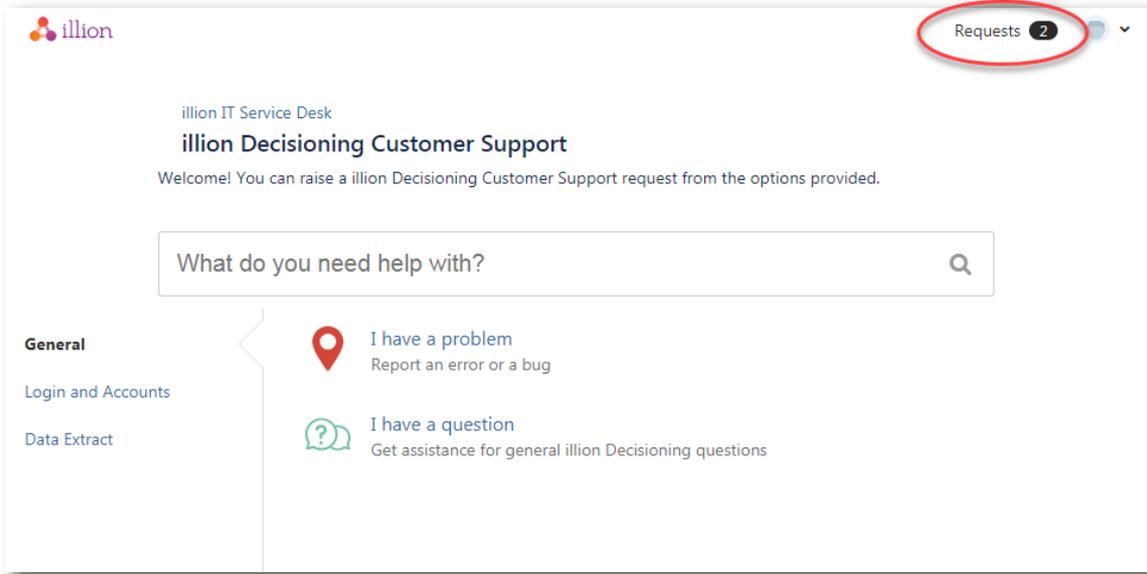


If the issue becomes urgent:

Please log into JIRA and update the ticket (instructions following), then follow-up with a phone call to the CR Portal Support team on +61 3 9840 6631.

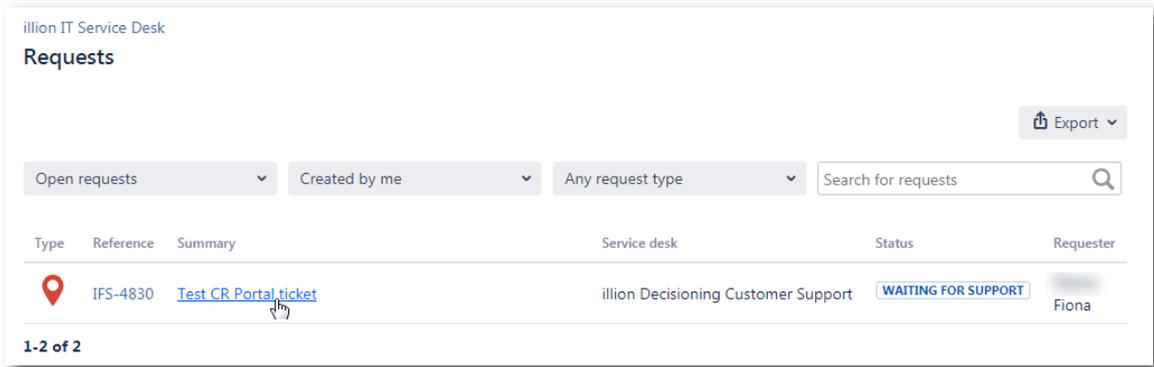
How to add Information to a Support Ticket

Any outstanding / currently open service requests can be accessed via the 'Requests' link on the Support Desk page:



To add information to a support ticket:

1. Log into the illion JIRA Service Desk. The Service Desk page will display.
2. Click on the 'Requests' link located top right of the page (as displayed above). All currently open requests will be listed:



3. Click on the service request you would like to add information to, by clicking on the request summary (as displayed above) or the request reference number. The details of the request ticket will display:



illion IT Service Desk / illion Decisioning Customer... / IFS-4830
Test CR Portal ticket WAITING FOR SUPPORT

Comment on this request...

Don't notify me

Shared with
Fiona
Creator

Details 13/May/19 11:05 AM

Phone Number
[Redacted]

Environment
CR Portal

Impact
Very low or no impact to normal operation

Incident Date and Time
13/May/19 11:49 AM

Description and Additional Information

4. Click on the comment field. The field will expand and display additional options:

Comment on this request...

Add Cancel

Drag and drop files, paste screenshots, or browse

5. Enter the additional information into the comment field and click on the 'Add' button. The CR Portal support team will be notified of an update to the ticket.

If the issue becomes urgent or urgent: please update the service request and follow-up with a phone call to the CR Portal Support team on +61 3 9840 6631.

How to Submit a General Question

To ask us a general query or to find out the process for anything related to the CR Portal, use the 'I have a question' link provided on the Service Desk page. The 'query' form is much smaller allowing questions to be submitted quickly and easily.

To submit a general question:

1. Login to the illion JIRA Service Desk at <https://servicedesk.illion.com.au> using the login credentials provided by illion.



2. Click on the 'I have a question' link:

illion Decisioning Customer Support
Welcome! You can raise a illion Decisioning Customer Support request from the options provided.

What do you need help with?

General

Login and Accounts

Data Extract

I have a problem
Report an error or a bug

I have a question
Get assistance for general illion Decisioning questions

The 'query' form will display:

Summary

Customer Reference Number *(optional)*

Phone Number

Additional details *(optional)*

Attachment *(optional)*

Drag and drop files, paste screenshots, or
[browse](#)

3. Enter question subject into the Summary field. If the question is short, type the question into the Summary field.
4. Enter your direct contact number into the 'Phone number' field.
5. If your question is too long to fit into the 'Summary' field, enter your question into the 'Additional details' field. Or, if you wish to provide further information about your question, this can be provided in the 'Additional details' field.



The 'Additional details' field is not mandatory, so if your question has been entered into the 'Summary' field, you can leave the 'Additional details' field blank.

6. Click on the 'Create' button located at the bottom of the form
7. Your ticket will submit, and a summary of the information you provided will be displayed on the screen.

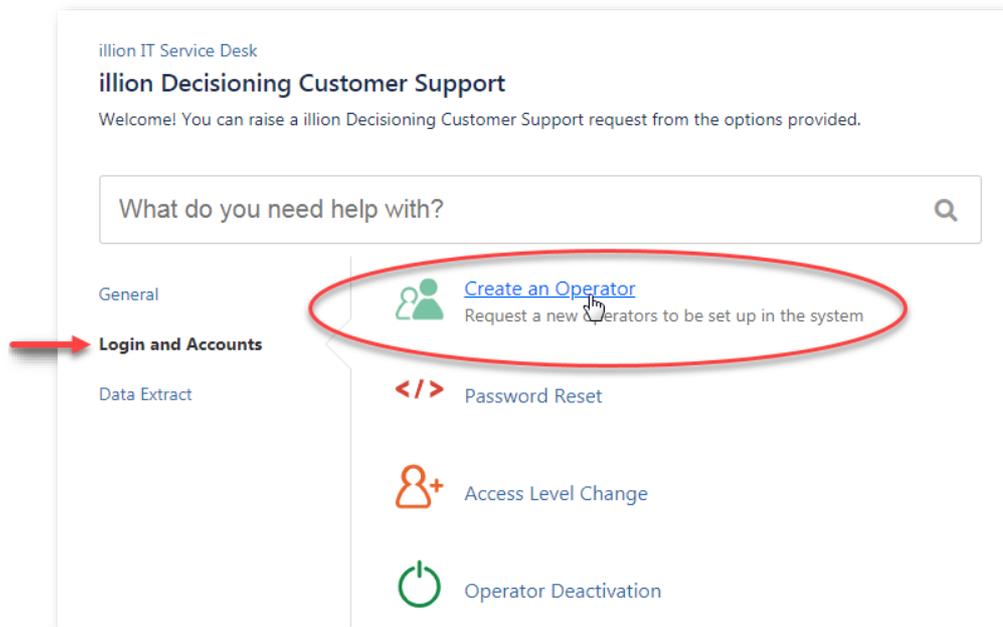
You will receive a confirmation email from the Support team advising they have received your query, quoting a reference number. The Support team will be in contact either by updating the ticket (you will receive an email displaying any information added to the ticket), or by calling you directly.

How to Request an additional login to the JIRA Service Desk

If there are staff at your company that require access to the JIRA Service Desk, ask someone who already has a JIRA Service Desk login to request an additional login (steps provided below).

To request additional logins to the illion JIRA Service Desk:

1. Ask a staff member who has an existing login to the JIRA Service Desk to login to the Service Desk (<https://servicedesk.illion.com.au>). The Service Desk page will display:



2. Click on the 'Login and Accounts' option located on the left side of the screen. New options will display on the right side of the screen as displayed above.
3. Click on the 'Create an Operator' link.



The 'Create Operator' form will display:

illion IT Service Desk / illion Decisioning Customer...

Create an Operator

First Name

Last Name

Email Address

Environment

Access Level

Phone Number

Provide the access level you need. If you have the name of a user who you require the same level of access - please note the username/Operator ID here.

4. Enter details of the person who requires access to the JIRA Service Desk into the following mandatory fields:
 - First Name
 - Last Name
 - Email Address
5. Click on the 'Environment' field and select JIRA Service Desk
6. Type 'standard access' into the 'Access Level' field.
7. Enter a direct contact number for the person who requires the Service Desk login.
8. If required, add information to the optional fields.
9. Click on the 'Create' button to submit the login request to the Support Team.



User Documentation

Software Solutions Customer Support Portal

CR Portal user documentation can be found on our Customer Support Portal. The Customer Support Portal is a secured website that provides 24/7 access to key product information such as user guides, latest news and planned outages. Access to the Customer Support Portal is via account login.

Customer Support Portal URL: <https://softwaresolutionsportal.illion.com.au/>

The image shows two screenshots of the illion Software Solutions Customer Support Portal. The top screenshot shows the main portal page with a navigation menu. The 'Documentation & User Guides' link is circled in red, and a callout box points to it with the text: 'CR Portal User Guides can be found on the Documentation page'. A large red arrow points from this callout to the bottom screenshot. The bottom screenshot shows the 'Documentation & User Guides' page. The 'CR Portal User Guides' link is circled in red. Below this link is a table with two columns: 'Document Name' and 'Description'.

Document Name	Description
CR Portal Upgrade - Quick Reference Guide	Provides an overview of the functions in the upgraded CR Portal version and the same functions in the previous version of CR Portal (v5.0.1).

How do I organise a login to the Customer Support Portal?

New CR Portal Implementations

Please fill out the form in Appendix B to nominate the users who require access to our Customer Support Portal. The form then needs to be provided to your illion CR Portal Project Manager.



Existing Customers

Please log a JIRA ticket requesting access to the Software Solutions Customer Support Portal, providing the name and email address of those who require access. Once access has been organised, users will receive an email inviting them to create their Support Portal login credentials.

Refer to Appendix C - 'Support Portal Sign up Instructions' for detailed instructions about the Support Portal sign up process.

Refer to page x for instructions on how to log a JIRA ticket.



Appendix A - JIRA Service Desk Setup Form

CR Portal support is provided by logging a ticket on our JIRA Service Desk. This ensures issues or questions are submitted directly to the CR Portal support team, and a support history is maintained.

Existing CR Portal Users

If you would like to receive access to our JIRA Service Desk, please ask a staff member who has a JIRA login to create a ticket requesting access for you (instructions provided on page 8 of this document).

New CR Portal Implementations

Please fill out the form below with the details of users within your business who require access to our JIRA Service Desk to log support tickets. Once completed, please email the form to your illion CR Portal Project Manager (feel free to copy and paste the form directly into an email).

Please provide details of all CR Portal users who will require access to the JIRA Service Desk to log issues or submit questions:

JIRA Service Desk Users		
Name	Email Address	User Name
E.g. Bridget Dixon	Bridget.dixon@illion.com.au	bdixon

All users listed in the above table will receive an email directly to the email address provided, advising of their login credentials and the URL to use to access the JIRA Service Desk (<https://servicedesk.illion.com.au>).

Detailed instructions on how to use the JIRA Service Desk are provided in the JIRA Service Desk Instructions section.



Appendix B - Customer Support Portal Setup Form

CR Portal user documentation can be found on our Customer Support Portal. The Customer Support Portal is a secured website that provides 24/7 access to key product information such as user guides, latest news and planned outages. Access to the Customer Support Portal is via account login.

Existing CR Portal Users

If you would like to receive access to our Customer Support Portal, please log a request via our JIRA Service Desk at <https://servicedesk.illion.com.au>. Please provide the name and email address of the person who requires access.

New CR Portal Implementations

1. Please fill out the form below with the details of users within your business who require access to our the Customer Support Portal to view and download CR Portal documentation.
2. Once completed, please email the form to your illion CR Portal Project Manager (feel free to copy and paste the form directly into an email).

Please provide details of all CR Portal users who would like to access to up-to-date CR Portal documentation and information:

Access to Customer Support Portal for User Documentation	
Name	Email Address
E.g. Bridget Dixon	Bridget.dixon@illion.com.au

All users listed in the above table will receive an email directly to the email address provided, inviting them to create the Customer Support Portal login credentials.

Refer to Appendix C - 'Support Portal Sign up Instructions' for detailed instructions about the Support Portal sign up process.

If any issues are experienced around the Support Portal sign up process, please email marketing@illion.com.au for assistance.



Appendix C - Support Portal Sign up Instructions

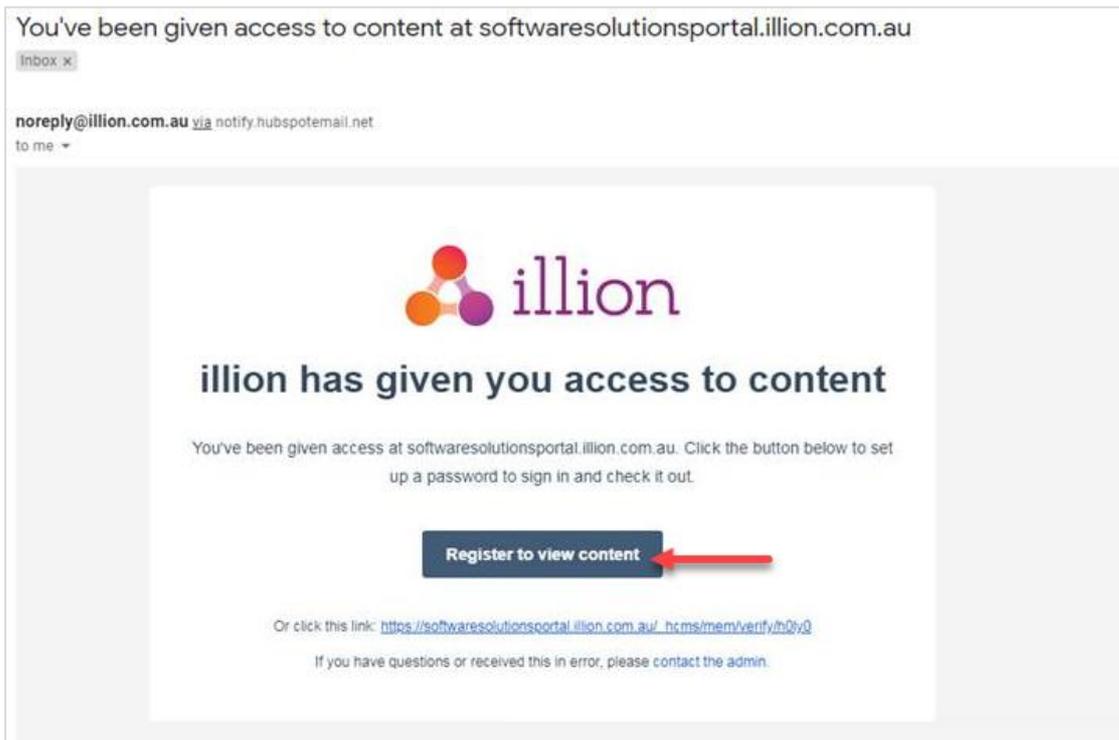
Instructions to create a new User Account

The following information provides step by step instructions on how to sign up for a new user account on the Software Solutions Customer Support Portal. The emails below will be sent to your email address once you are registered to receive access to the Support Portal.

Please note: existing customers who would like to access the Support Portal need to submit a request for access via our JIRA Service Desk: <https://servicedesk.illion.com.au>

Email 1: Invitation to access the Customer Support Portal

Once your email has been registered on the Customer Support Portal, you will receive an email inviting you to register an account, similar to the example below:



1. Click on the 'Register to view content' button displayed in the invitation email. A welcome screen will display:



Welcome!

Set up your password to sign in and see the content you now have access to.

Email*

katrina.mccomb@gmail.com

Password*

Show password

Password

Password must be at least 8 characters long and include lower and uppercase letters, a number, and a symbol

Confirm Password*

Show password

Confirm Password

Save password

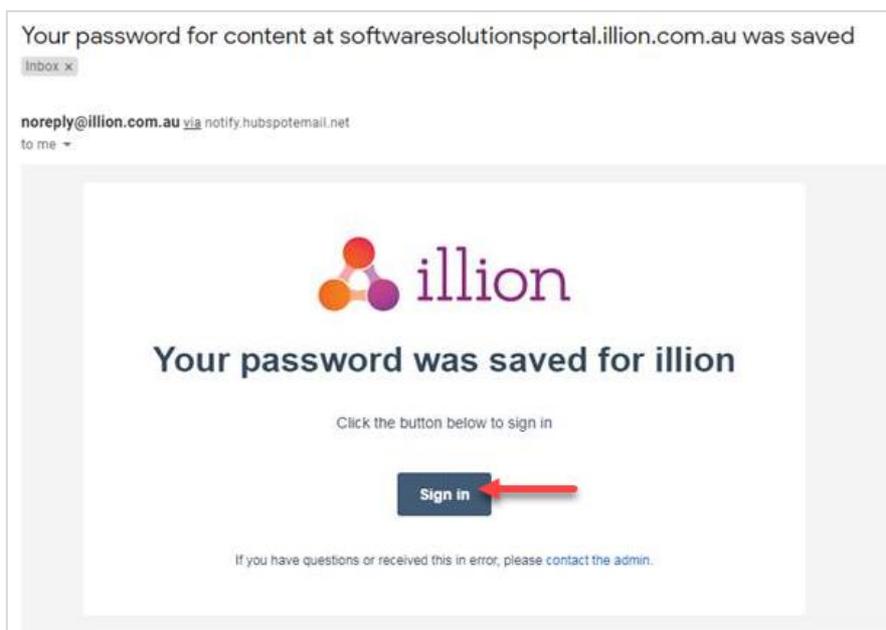
Having trouble? [Contact the admin](#)

The 'Email' field will be populated with your registered email address, and the field will be locked.

2. Enter a new password into the 'Password' field.
3. Enter the same password into the 'Confirm Password' field
4. Click on the 'Save password' button.

Email 2: Confirmation email and sign in

A confirmation email will be sent to the email address that was displayed in the welcome screen:





1. Click on the 'Sign in' button displayed within the confirmation email. The sign in page will display:

illion

Sign in to view this page

This page is only available to people who have been given access.

Email*
marketing@illion.com.au

Password* [Show password](#)
.....

Remember Me
[Forgot your password?](#)

Login

[Having trouble? Contact the admin](#)

2. On the sign in page, enter your email address and newly created password.
3. Click on the 'Login' button.

A successful login will take you to the Software Solutions Customer Support Portal Home Page:

+61 3 9840 6631 [Visit illion we](#)

Home Product Updates + Release Notes Documentation & User Guides Frequently Asked Questions Contact Us

illion Software Solutions Customer Support Portal

Welcome to the illion Software Solutions Customer Support Portal

This site provides you, our valuable customers, with access to key information, user guides and updates that will enable you to get the maximum value out of your organisations investment in our products. Information can be found by navigating through the menus displayed at the top of the page.

Feel free to utilise the information within this site to assist you.

This is a live site and we will continue to build it out with new information. If there is additional information you would like to have available then please [contact us](#) and we will look to get this added as a priority.

Latest News

- [illion CR Portal update to v5.2.0 improvements](#)

As part of delivering continual investment in the products and services you use, we updated our illion CR Portal product for all customers on our managed platform on June 10. This release brings an updated user experience, together with more robust technology and security... [Learn More >>](#)



Who do I contact if I am having trouble accessing the portal?

Please send an email to marketing@illion.com.au with your contact details, and a description of the problem you are experiencing, and someone will be able to assist you directly.

To access the Software Solutions Customer Support Portal:

- Login URL: <https://softwaresolutionsportal.illion.com.au>
- Or - go to the illion Home Page: www.illion.com.au. Navigate to the 'Client Logins' menu and click on 'Software Solutions Customer Support Portal' as displayed below:

