Planview Customer Community Guide
Service Cloud Community Overview

The Customer Care Portal URL is:  https://support.planview.com/

1. **Home** - Click on the graphs and tables displayed in the Home dashboard to see cases specific to your account. You can see all your company’s cases in one location.
2. **Submit Case** - Click Submit Case to create a new case. A wizard-like process will be used to determine where your case should be routed.
3. **Success Center** - Click Success Center for easy access to the Customer Success Center -  https://success.planview.com
4. **Service Release – Enterprise One** - Click this option to see current service releases for the E1 product line.
5. **US/EU FTP** - The US FTP or EU FTP options are available under More and provide access to the FTP sites if your company has any.
Add Contacts

Community gives our customers the ability to maintain their own contacts. Your default profile in Community is that of an administrator, allowing you to add contacts and enable existing contacts.

1. Click on your **username** at the top right to open the option list.

2. Click on **My Account** to open your account page.

3. The account layout page allows you to see contacts under Related and information about your account under Details. Click **New** on the Contacts section to add a new contact.
4. Populate the required fields Last Name and Email on the New Contact page. It’s also helpful for us to have your first name and phone number if you’d like us to be able to call you about cases.

5. Click Save.

6. Open the Contact recently created by selecting the Contact Name

7. Click on Enable Customer User

8.

Submit Cases

Cases for all Planview products may be submitted and managed via the Planview Customer Community.

The Product Line values available for selection will depend on the active contracts and products your Organization has purchased. Please note that you will see one product line per instance owned. This means you might see duplicate values when selecting
Product Line. To assist in identifying which instance the issue is related to, we’ve appended to the Product Line name your instance sub-domain name. For example, if your Organization owns 2 LeanKit instances, you will see the following as options on the Product Line drop-down:

- LeanKit (instance name A)
- LeanKit (instance name B)

### Case Submission Process

<table>
<thead>
<tr>
<th>Description</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the Type of Request you will be submitting.</td>
<td></td>
</tr>
<tr>
<td>- <strong>Customer Support</strong> - issues with tool, report a bug, functionality questions, etc.</td>
<td></td>
</tr>
<tr>
<td>- <strong>Global Services</strong> – billable engagements for Reporting or Integrations.</td>
<td></td>
</tr>
<tr>
<td>- <strong>Managed Services</strong> – for use only if your organization has purchased managed services for administration.</td>
<td></td>
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</tbody>
</table>

Product Lines owned by your Organization will display in the drop-down appended by the name of the instance in parenthesis if its available.
Please populate the required fields and provide as much information as possible.

The Type of issue and Product Line selected drive the fields that will appear for input, including the product capability options.

Select Next to upload attachments.

If there are any files or screenshots that should be attached to the case, you can upload them or drag and drop the files during this step.

Providing full page screenshots will help our consultants more quickly resolve your issues.
<table>
<thead>
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<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once the file upload is complete the Done button will become active.</td>
<td><img src="image1.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>Click Done and then Next</td>
<td><img src="image2.png" alt="Screenshot" /></td>
</tr>
<tr>
<td>Note: you will not see file names in the screen for confirmation of upload.</td>
<td></td>
</tr>
<tr>
<td>Select NEXT and the created case with attachments will be viewable.</td>
<td></td>
</tr>
</tbody>
</table>
Case Collaborators | Additional Contacts

Once a case has been created using the Submit Case process, case collaborators can be added to each case. At the bottom left of the Case Layout you’ll see the Case Collaborators section. You can add contacts already associated with your account or you can add the email addresses of individuals you’d like copied on the account but who are not contacts.
Case Dashboards and Reports

Dashboards

There are several ways to access your cases from Community. On the Home tab, you can click on the Expand icon from any section of the dashboard to see a larger image of the different sections.

Clicking on **Open Cases by Status** results in an enlarged image of that section. Each of the bars in the chart can also be clicked to limit the list of related cases to the selected status. Clicking again takes you back to the original report.

Clicking on the case number or subject in the case list allows you to open a specific case. Once you are viewing the Case Layout you can perform various actions on the case.
Case reports have several configuration options available as shown in the screenshot above and listed below:

1. You can **Toggle** the display of the chart, **Filter** by various fields like record type and status, **Refresh** the data in the report, **Show** the different report sub-sections and **Export** the data.
2. You can control the type of chart that displays by changing the **Display As** setting.

Depending on the type of chart you’ve selected you can then modify related settings. In the donut chart example above

1. You can modify the **Chart Title** in the Chart Attributes section.
2. You can modify the counts that display on the chart by changing the options in the **Sliced By** section.
Case Actions

You can open the Case Layout for a specific case by drilling down on a dashboard, a report or by searching for a case. Once on the Case Layout, the following options and actions are available depending on the current state of the case:

- **The Close Case** button allows you to close an open case.

- **The Re-Open Case** button allows you to re-open a closed case.

- **Details** allows you to see the information included when the case was originally submitted. If you’d like to change any of the information on the case, please post a comment requesting the change. A case can’t be edited by a customer once it has been submitted. The Details section will also include the Close Case Notes, a summary of the case resolution, if the case has been closed.

- **The Accept and Decline** buttons allow you to accept or decline a case that’s been set to the status Solution Provided. If you agree with the provided resolution, click Accept. If you disagree with the solution that has been provided, click Decline and please post a comment explaining why you disagree that the case is resolved. The status of the case will be set to Reopened.
- Post a comment on the case to send an update or answer a question.

- Drag and drop files to the Attachments section to provide additional information on the case.

- Add Case Collaborator allowing additional contacts to view the correspondence on the case.
Search

When searching in Community, you can search by case number, legacy ticket number or simply a word referenced in a case. Search results are based on all records and files that a community member can access.

- Search by case number
  ![Search by case number](image1)

- Search by a word in cases
  ![Search by a word in cases](image2)

- Search by external (old ticketing system) ticket number
  ![Search by external ticket number](image3)

Contact Us

Please go to our [Description of Support Services](#) appendix 1 to see our communication matrix.