Enterprise Software Customer Experience
http://new.abb.com/enterprise-software/services/maintenance/support

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Contents

Overview ........................................................................................................................................... 5
  Introduction ..................................................................................................................................... 5
  Additional Documents .............................................................................................................. 5

Accessing the Customer Portal ....................................................................................................... 6
  Customer Portal Access ............................................................................................................ 6
  Logging in to the Customer Portal ............................................................................................ 6
  Setting Password on First Login ................................................................................................. 6

Home Page Overview ...................................................................................................................... 8
  1 – Alerts and Notifications ........................................................................................................ 8
  2 – Shortcut Menu ..................................................................................................................... 8
  3 – Main Menu Tabs .................................................................................................................. 8
  4 – Search and Personal Settings ............................................................................................. 9
      Personal Settings .................................................................................................................. 9
      Search ...................................................................................................................................... 9

Personal Profile and Settings ........................................................................................................ 10
  Personal Profile ....................................................................................................................... 10
  Personal Settings .................................................................................................................... 10
      Location Settings ................................................................................................................ 11
      Security Settings ................................................................................................................ 11
      Email Settings .................................................................................................................... 11
      Activity Reminders .............................................................................................................. 11
      Approved Connections ...................................................................................................... 11
  Change Password ..................................................................................................................... 11

Searching Customer Portal ........................................................................................................... 13
  1 – Search Results .................................................................................................................. 13
  2 – Records Searched .............................................................................................................. 13
  3 – Refining Search ................................................................................................................ 14

Chatter .......................................................................................................................................... 15
  1 – Viewing Menu .................................................................................................................... 15
  2 – Message Display .............................................................................................................. 15
  3 – Recommendations ........................................................................................................... 17

Knowledge ..................................................................................................................................... 18
  1 – Knowledge Articles ......................................................................................................... 18
  2 – Searching Knowledge ...................................................................................................... 19

Cases ............................................................................................................................................ 20
  Case Home Page ..................................................................................................................... 20
    1 – Case List View ................................................................................................................ 20
    2 – Create New Case ........................................................................................................... 20
    3 – Case View Selection .................................................................................................... 20
    4 – Case View Quick Selection .......................................................................................... 21
  Case View .................................................................................................................................... 21
    1 – Short Cut Links .............................................................................................................. 21
    2 – Case Detail .................................................................................................................... 22
    3 – PD Information ............................................................................................................ 22
    4 – Case Work Log ............................................................................................................... 22
Creating a New Case........................................................................................................................................... 22
Updating a Case .................................................................................................................................................. 23
  Adding New Information to a Case .................................................................................................................. 23
  Updating Case Detail Information .................................................................................................................. 25
Closing a Case ..................................................................................................................................................... 25

**Code Changes and Fixes** ............................................................................................................................... 26
  Viewing a Change Request ............................................................................................................................... 26
    Within a Case ............................................................................................................................................... 26
  Searching Change Requests ............................................................................................................................ 27
  Viewing a PD Issue .......................................................................................................................................... 27
    Within a Case ............................................................................................................................................... 27
  Searching PD Issues ...................................................................................................................................... 28

**Reports and Dashboards** .............................................................................................................................. 29
  Customer Portal Reports ............................................................................................................................... 29
    1 – List of Folders ....................................................................................................................................... 29
    2 – List of Reports ..................................................................................................................................... 29
    3 – Report List Filters ............................................................................................................................... 30
    4 – Searching for Reports .......................................................................................................................... 30
  Viewing a Report ........................................................................................................................................... 30
    1 – Report Options ..................................................................................................................................... 30
    2 – Action Buttons ..................................................................................................................................... 31
    3 – Report Data .......................................................................................................................................... 31
  Customer Portal Dashboards ......................................................................................................................... 31
    1 – Dashboard Search ............................................................................................................................... 32
    2 – Dashboard .......................................................................................................................................... 32
  Requesting Special Reports or Dashboards .................................................................................................. 32

**Workspaces, Content, and Subscriptions** .................................................................................................... 33
  Workspaces .................................................................................................................................................... 33
  Content .......................................................................................................................................................... 34
    1 – Filter Menu .......................................................................................................................................... 34
    2 – Content Search .................................................................................................................................... 34
    3 – Content Display .................................................................................................................................. 35
  Subscriptions .................................................................................................................................................. 35
Overview

Introduction

Welcome to the Customer Portal User Guide. The Customer Portal is the primary and most effective way for you to access information about your product or request support from Customer Experience (CX). This document provides a functional guide on how to use the Customer Portal.

The Customer Portal gives you access 7 x 24 to:

- Find important documentation
- Review Technical Service Bulletins (TSBs)
- Use the Knowledge Database to find answers or solutions to common questions or issues
- Interact with like customers through online user communities
- Download/request available software product updates and/or patches
- Track support cases
  - Submit new cases
  - Attach supporting documentation or files to a case
  - Update open cases or close resolved cases
  - View details on any cases reported by your organization
- Submit Customer/Company satisfaction surveys
- Update personal information

This document provides a functional guide on how to access these features through the Customer Portal.

Additional Documents

- Customer Experience Policy Guide
  - This document provides a description of how Customer Experience (CX) provides support to ABB customers. This description includes suggestions on what information to provide when opening cases as well as definitions for case priority levels.
  - The policy guide is available through the official CX web page – see URL on the front page of this document.
Accessing the Customer Portal

Customer Portal Access

The Customer Portal can be accessed from the CX web page found at the following URL:
https://new.abb.com/enterprise-software/services/maintenance/support

The link to the Customer Portal is at the top of the page.

The Customer Portal can also be accessed directly using the following URL:
https://enterprisesoftware.force.com/customerportal/login

Important. Before you can log into the Customer Portal it is important you have an account. Please contact your CX representative to request access to the Customer Portal. Once an account has been created you will receive an e-mail with your login and password information. You will be asked to change the password on your first login. Please see the CX web page (link above) for details on contacting CX.

Logging in to the Customer Portal

– When you access the Customer Portal you will be presented with the following login picture

![Figure 1. Customer Portal login dialog](image)

– Enter the username and password as provided via email
  • If a password is not available, click *Forgot your password?* Enter the user name and click *Submit*. An e-mail will be sent to the address you have registered with a temporary password

– Press *Log In* to proceed to the Customer Portal home page

Setting Password on First Login

Logging into the Customer portal for the first time, or if your password has been reset by ABB, you will be asked to set a new password when you log in. In this scenario the following password dialog will be displayed.
Create a password that is at least (each condition will light up green when met)

- 8 alphanumeric characters in length
- Contains at least 1 letter
- Contains at least 1 number

- **Confirm New Password** by entering it again
  - An error will be displayed if the two entries do not match

- Press **Change Password** to complete setting your new password
  - **Note.** This button only activates when the form is correctly filled
Home Page Overview

Upon successfully logging into the Customer Portal the portal home page is displayed. The home page consists of 4 functional areas – fenced and numbered in red – which are described below in detail.

1 – Alerts and Notifications

The main section of the home page is used to display general alerts and notifications from ABB to all customers. Each notification contains a link to additional details.

2 – Shortcut Menu

The shortcut menu provides quick access to the functions described below

- Your profile and Logout. Selecting the link to your profile allows you to see/edit the information CX has on you, including contact e-mail and phone.
- Calendar – this is a general calendar you can use to record events associated with your usage of the Customer Portal for example.
- Recent items you have worked on. For example, this will list links to any support cases you have recently accessed.
- Customer Portal Links – provides links to other CX web sites.
- Questions? Provides information on how you can contact CX via phone with any questions.

The shortcut menu can be minimized by clicking either of the left-point arrows at the top or bottom of the menu. The menu will be visible when accessing most functions in the Customer Portal.

3 – Main Menu Tabs

The main menu is always visible at the top of your Customer Portal view and consists of the following tabs/options. Each feature is described in greater detail in other parts of this document.

- Home takes you back to the Customer Portal home page from anywhere. If you were in the middle of editing any item, any unsaved data will be lost.
– **Chatter** will allow you to sign up to and read messages posted within SalesForce on cases or within user communities (general or product specific).

– **Knowledge** allows you to search for Technical Service Bulletins (TSBs) concerning your products as well as search an extensive repository of knowledge articles with answers/resolutions to common questions and issues.

– **Cases** allows you to view, create or close cases from your company. Security levels can be defined within the Customer Portal user profile to limit whether a user can see all cases from a company or only their own, as well as whether or not the user can close cases. Please contact your CX representative if restrictions are required.

– **Change Request View** allows you to view all published Change Requests for products under maintenance. Published Change Requests include any case which has been forwarded to development for a defect correction for example. Customers will be able to see Change Requests published, including those submitted by other customers, but will not be able to access any details about the other customers (for examples names, contacts, etc.).

  • **Note.** As of January 1st, 2020 ABB has moved to a new tool for tracking code changes. The Change Request View will therefore only display information on Change Requests released prior to that date. Please see section on Code Changes and Fixes later in this document for more details.

– **Reports** provides you access to several standard reports which have been developed for our Customers to get real-time information about their support cases with CX.

– **Dashboards** provides access to standard dashboards which have been developed for our Customers to track multiple types of information about the status of their cases.

– **Workspaces** provides a list of all product download workspaces with which you are associated. A Workspace product download folder houses content related to product workspace.

– **Content** lists all the available media (e.g. Emergency Patches and Patch Releases) you can download based on workspace security and contractual entitlement.

– **Subscriptions** provides a list of Workspaces and Contents to which you have subscribed.

  • When you subscribe to a Workspace, you will get automatic notifications from the Customer Portal when new content is added to the workspace or altered.

---

**4 – Search and Personal Settings**

**Personal Settings**

Clicking on your name in the top right hand of the screen will display a dropdown menu with two options

– **My Settings** – Use this option to edit your Customer Portal settings. For example, your time zone or to change your password.

– **Logout** – Use this option to end your session with the Customer Portal

**Search**

The search feature is used to search for information in the Customer Portal. The results of a search are presented sorted into logical groups such as cases, Change Requests, knowledge articles, etc. Selecting one of these groups you can limit your search to only items within the selected group.
Personal Profile and Settings

Personal Profile

To view or update personal profile, select **My Profile** link in the shortcut menu on the left of your screen. (If you cannot see it check if you have minimized the menu or return to the home page by clicking **Home** at the top of your portal view.) This will display the following information.

![Figure 4. User profile information view](image)

To edit your personal information, press the **Edit** button at the top of page.

**Important.** It is very important that your contact information is accurate and up to date. This information is automatically copied into any cases you open and is used by CX representatives to contact you for follow up on your case. If the information is not correct issue resolution will be delayed while trying to reach you.

Update any applicable information. When finished, press **Save**.

Personal Settings

Selecting **My Settings**, from the dropdown menu activated by clicking your name on the top right of your Customer Portal view, will display the following options.
Location Settings
Use this option to select your language, locale, and time zone. These can also be set by editing your profile as described in the previous section.

Security Settings
Allows you to change your Customer Portal account password.

Email Settings
Use this option to configure which events in SalesForce will trigger the system to send you an e-mail notification. An option exists to turn off any and all e-mail notifications.

Activity Reminders
Use this feature to configure when (or if) SalesForce should display or send you reminders – for example reminders on activities recorded in the SalesForce calendar.

Approved Connections
This feature is disabled and provides no options.

Change Password
Two options exist to change your Customer Portal account password.

The first option is to open your personal profile as described in first section of this chapter, and then press the Change My Password button at the top of the page – see figure 4.

This will display the following form.
Figure 6. Change My Password dialog screen

Enter the old and new password. When finished, press Save.

The second option calls for you to open My Settings as described in the previous section and selecting Security Settings. This will display the following dialog.

Figure 7. Security Settings dialog to change password

Enter the old and new password. When finished, press Save.
Searching Customer Portal

The **Search** feature (top righthand corner) allows you to perform a free text search through all areas your profile allows you access to. Searches could for example be for a specific case using the case number or key phrases used in the case – like in the case subject or description, as well as in any case comment.

**Note.** Any search will be limited to information you have access to only. For example, only cases opened by you or your organization will show up in the results if they match your search criteria.

The figure below shows how results from a sample search are presented with the three main areas highlighted. Each area is described in detail below the figure.

![Figure 8. Presentation of search results](image)

1 – Search Results

This is where the system displays the results of the search you requested. Results are grouped by the type of record where a match to your search criteria was found. The record type is listed at the top of each group along with a count of how many matches were found within this record type. Only the top 5 matches are shown within each group by default (or less if less than 5 matches were found). To view the full list of matches within a specific record type click the **Show More** link at the bottom of the relevant group.

Clicking on any one of the displayed records will bring up a view of that one record.

2 – Records Searched

The left-hand side of the search results view displays a list of all the record types searched by the Customer Portal in response to your request. Record types where matches were found are highlighted in blue detailing the number of matches found within the record.

Clicking on a highlighted (in blue) record type will take you to a full listing of all the matches found within that record type.
3 – Refining Search

At the top of the results view is a new search field allowing you to enter a new search phrase. There are two ways in which to limit/filter your search.

– Using the Options... link displayed to the right of the search field allows you to limit the search to only items you own and/or search only for the exact phrase you provided.

– Drilling down into any of the record types where matches were found will limit your search to only records of this particular type. For example, using the example above, if we were to drill down into the list of matching knowledge articles any new search using the new search field will limit the search to only knowledge articles matching your new search criteria as show on the figure below.

![Search Field](image)

*Figure 9. View articles searches are limited to articles only*

**Note.** To make a new general search simply use the original search field in the top right corner of the Customer Portal.
Chatter

Customer Portal Chatter is your path to interacting with ABB people and like customers by posting thoughts, ideas, comments, and ask questions of a general nature. You can post within a specific product user community, to the general community, or to specific people.

The following figure shows the Chatter view in the Customer Portal with the main functional areas highlighted.

![Figure 10. Customer Portal Chatter view](image)

1 – Viewing Menu

The viewing menu in the Chatter view allows you to select what you want to view. By default, your personal feed will be selected. All the options are:

- Feed – your personal feed displaying any new messages directed at you or from people/groups followed
- People – new postings from specific people followed
- Groups – new postings within groups followed (for example product related user communities)
- Files – any files recently viewed, uploaded, or modified
- Topics – a list of topics in Chatter sorted by number of people participating in conversations

2 – Message Display

This is the area where any new updates to the feeds you follow (have joined) will be displayed. You can use the menu options described above to select which feeds are displayed and to limit the number of messages displayed.

At the top of the message display area are four activities to allow you to interact with other people using Chatter.

- Post – use this function to start a new conversation by posting a comment. Who can see the new comments depends on your selection of target audience. If you select My Followers (default) any person fol-
Following you will be notified and see the message. If you select **A Group**, the audience will be all the members of the selected group. The audience is displayed at the bottom of the posting dialog as shown on the figure below.

![Figure 11. Chatter posting dialog with audience pointed out](image)

When you have completed composing your new comment press **Share** to post the comment to the selected conversation/feed.

- **File** – use this function to start a new conversation along with an attached file. The file to upload can be located within **Chatter** or originate from your PC as shown in the figure below.

![Figure 12. Chatter posting comment with attached file dialog](image)

The rules described above concerning posting audience apply to this posting. When you have completed composing your new comment press **Share** to post the comment to the selected conversation/feed.

- **Link** – use this function to post a link to a website alongside your comment when starting a new conversation. You will be asked to enter the URL address of the link as well as a name for the link.

The rules described above concerning posting audience apply to this posting. When you have completed composing your new comment press **Share** to post the comment to the selected conversation/feed.

- **Poll** – use this function to start a poll in **Chatter**. At the top of the dialog you are required to enter the question you are polling. Below you can define the answers the poll audience can select from. By default, you are provided two answers, but more can be added if so desired.

The rules described above concerning posting audience apply to this posting. When you have completed composing your poll press **Share** to post the poll to the selected conversation/feed.

Beyond starting a new conversation in **Chatter**, you can also comment on an existing ongoing conversation displayed in the message display area. Below each comment displayed are three functions

- **Comment** – use this function to post a comment in an existing conversation thread; you can attach a file to your comment
– Like – use this function to indicate you like what you read in the comment
– Share – use this function to forward the comment to other people you know who might find it interesting

3 – Recommendations

The Customer Portal will display a set of Chatter feeds that it recommends you join based on feeds already joined and your and your company’s profiles. To join any of the recommended feeds simply click the join button displayed with each recommended feed.
Knowledge

Customer Portal Knowledge is a knowledge database which contains Technical Service Bulletins, answers to common questions, and resolutions for common issues. You are encouraged to search the knowledge articles for answers/solutions to your questions/challenges prior to submitting a case to CX.

The figure below shows the view when you first open Knowledge. The two main areas are highlighted and are described in detail below the figure.

Figure 13. Default Knowledge view when first opened

1 – Knowledge Articles

This area provides a list of relevant knowledge articles. By default, this list will display all the latest knowledge articles added to the system since your last visit. When you perform a search (see next section) in the knowledge database this area will list the articles that match your search criteria.

Clicking on the title line of any knowledge article will bring up the article for you to read as shown in the figure below. Each article contains a step-by-step section containing main content of the article. Below this section will be any attachments (up to 3) that are part of the article (if any).

The article view contains three functions highlighted on the figure.

- **Back to Knowledge Search** – takes you back to the main knowledge view shown on figure 13 above.
- **Show Properties** – shows the article properties - publishing dates, targeted audience, article number, and article summary.
- **Printable View** – presents the article in a view formatted for easy printing.
If an article you read provided you with just the right answer to your question, please rate the article that assisted you using the rating feature immediately below the article title. This will not only help other people looking for the same answer, but also assist you in finding the same article should you need it again at a later date.

2 - Searching Knowledge

The search function provided at the top of the Knowledge view allows you to search for specific knowledge articles. The search is limited to only knowledge articles. You can enter a search phrase in the search field, and further limit your search using the two filter options below the search field.

- **Product** – limits your search to articles on a specific product, for example Asset Suite or Ellipse. Clicking the button will provide you with a drop-down menu listing all available product options, including sub-modules for some product lines.

  You can only select one Product at a time or all. Please note that the button text changes to match your selection. By default, all products are selected for your search.

- **All Article Types** – limits your search to specific article types. Clicking the button will provide you with a drop-down menu listing all available type options, for example documentation, known error, TSB, etc.

  You can select multiple article types for each search. Please note that the button text changes to match your selection. By default, all types are selected.

- **Reset** – resets the filters back to default, all products, all article types.

The results of your search are displayed as a list in the main area as described above.
Cases

If you are unable to find an answer/solution to your question/issue in the Knowledge section of the Customer Portal, the next logical step will be to open a case with ABB Customer Experience (CX). This chapter will go through the details of opening, monitoring, updating, and closing cases with ABB Customer Experience (CX).

Case Home Page

The figure below shows the **Cases** view. Key areas and functions are highlighted and described in detail below the figure.

![Figure 15. Case home page view](image)

1 – Case List View

The main area of the case home page displays a list of cases based on the selected view (see below). From this list you can open an individual case to review, update, or close it. To open a case, click on the case number or the case subject. Please find a description of the case view later in this chapter.

2 – Create New Case

Use this function to submit a new case with a request for assistance to ABB Customer Experience. Please see a more detailed description below.

3 – Case View Selection

Use this field to select which cases are listed in the case list view. By default, the case home page will always display a list of cases recently viewed. To change the list of cases shown first select a view from the dropdown list, and then press **Go** to generate the new case list.

The default views available are:

- **All Cases** – will display all cases created by your organization whether open or closed
- **All Closed Cases** – will display all cases created by your organization which have been resolved and closed
- **All Open Cases** – will display all cases created by your organization which remain open
- **My Closed Cases** – will display all cases created by you which have been resolved and closed
My Open Cases – will display all cases created by you which remain open

Recently Viewed Cases – will display cases recently viewed by you

Note. Other views may be available to you and/or your organization.

4 – Case View Quick Selection

Use this feature to easily switch between views of cases recently viewed and all cases created by you remaining open.

Case View

The figure below shows a full case form. The full form is usually longer than can fit on one screen requiring you to scroll down (or up) to see all parts of it. Each highlighted area on the figure is described in detail below.

![Case View Diagram](image)

Figure 16. Case view

1 – Short Cut Links

The short cut links provide easy access to relevant areas/functions to add information to the work log of the case. The functions are described further in the section on updating a case below.
2 – Case Detail

The information contained in the Case Detail area is the information you provide when opening a case with CX. This is the title and introduction to the request you have as well as how CX may get hold of you.

3 – PD Information

Here you will find a list of requests raised with ABB Product Development for code changes/fixes. If your case does not involve any code changes/fixes this section will remain empty. Please see the next chapter for details.

4 – Case Work Log

This area is where you can monitor and contribute to case progress towards resolution. Please see below on updating a case for details.

Creating a New Case

To submit a new case to CX click the Create New Case button on the case home page – see figure 15. This will open the new case view shown in the figure below.

![Figure 17. Create new case view](image)

The form consists of two types of fields:

- Mandatory fields - indicated by a red line on the left side of the entry field.
  
  **Note.** You cannot submit a case until all mandatory fields have been filled.

- Optional fields - additional fields that can be filled in where relevant.
**Note.** Some fields are filled in with default values. Please review these values before submitting the case to ensure they are correct.

Please see the **Customer Experience Policy Guide** for guidance on the information to enter in each field and definitions of the case Priority levels. You can find the guide on the CX official website at the link shown on the front page of this guide.

When all relevant fields have been completed, press **Save** to submit the case to CX. The completed case submitted will be displayed as shown in the figure below.

![Figure 18. New case just submitted to CX](image)

**Updating a Case**

**Adding New Information to a Case**

Once you have submitted a case to CX for assistance updates you make to a case will focus on case comments, attachments, and managing case collaborators. All these functions can be found below the **Case Detail** section (see #4 in figure 16 above) and are presented as shown in the figure below.
- **Case Collaborators** – use this function if additional people within your organization should receive e-mail notifications from this case. Click **New Case Collaborator** to open the collaborator entry dialog, enter the collaborator’s name and e-mail address, and press **Save** to submit the information to the case, or press **Save & New** if you need to add more than one collaborator to the case.

- **Case comments** – use this function to add comments to a case. Click **New Case Comment** to open the comment entry dialog, enter your comment, and press **Save** to submit the comment into the case. The case owner will receive a notification you have entered a new comment in the case.

- **Attachments** – use this function to add files, screen shots, etc. to your case as supporting information or upon request from CX. Click **Attach File** to open the attachment dialog. You will be asked to perform three steps
  - Select a file to upload from your PC (or shared drive available on your PC) – click **Choose File**
  - Attach the selected file to the case – click **Attach File**

Repeat the two above steps for all the files you wish to attach to the case before moving to the third step.

- Click **Done** to complete attaching files to the case.

- **Articles** – use this function to search the knowledge database for articles pertaining to your case. Click **Find Articles** to access the Knowledge search screen.

You may attach any articles you find to the case by answering **Yes, Close My Case** at the top of the article you have found. Please note this will only attach the article to your case and take you back to the case view – your case will not be closed unless you decide to do so.

If the article found does not help and you do not want it attached to the case press **No, Keep My Case Open**, which will return you to the knowledge article search page. To go back to your case, click the **Back to case ###** link at the top of the article search page.

- **Case Lookup – Support Surveys** – use this function to submit feedback on the case handling by CX. Click **New Support Survey** to open the survey form.

The form will ask you to rate 4 parameters each on your satisfaction with case handling and CX overall.

Each parameter can be rated from 0 to 10 with 0-6 being a negative rating, 7-8 being a neutral rating, and 9-10 being a positive rating. Default is 8. In each case you are also given the option to provide additional written feedback to expand on your rating.

Click **Save** to submit the feedback to CX.
Updating Case Detail Information

As a general rule you should not update the Case Detail section of a case once CX has started working the case towards resolution. If you, at any time, find there is any information you want to update – for example changing the case priority – please reach out to the CX representative working your case to have them perform the needed changes. This ensures that no information is missed and minimizes risks of delays/misunderstandings.

If you have just submitted a case and find, during your review, you have missed a key piece of information or entered incorrect information you do have the option to update the Case Detail information yourself. To do so go to the case home page and select to view My Open Cases. In the list of cases presented there will be an Edit link to the left of the case number as shown in the figure below.

![Figure 20. Link to edit case](image)

Find the case you need to update and click the Edit link next to the relevant case number. This will display the same form seen when you enter a new case (figure 17 above) with the fields filled in with the current information. Update the required information and press Save to submit the changes.

Closing a Case

There are two options for closing a case

- You can request CX to close the case when they provide you with the resolution to your request
- You can close a case yourself at any time during the case's lifecycle

To close a case yourself, open a view of the case you wish to close using one of the methods described at the start of this chapter. At the top of the case view click the Close Case button to open the close case dialog shown in the figure below.

![Figure 21. Close case dialog](image)

Select status Closed and select a Close Reason to match why you are closing this case from the dropdown options provided. Press Submit to confirm the case closure, or press Cancel to keep the case open.
Code Changes and Fixes

Some of your cases will result in the need for a code change or defect fix to be generated. All code change requests, whatever their nature, will be submitted to ABB Product Development for execution. You will be able to monitor progress of such requests through the Customer Portal from within the associated case.

Up until December 31st, 2019 such code change requests were tracked as Change Requests in your cases. Any code changes released prior to this date will still be shown in their corresponding Change Request.

From January 1st, 2020 ABB has initiated a new process which has resulted in code change requests being tracked as PD Issues in your cases. Any code change request submitted prior to this date and not resolved/released by the date have been migrated into PD Issues. All future progress on these will be recorded in the PD Issue only. Any new code change requests submitted post the above date will exist only as PD Issues.

This chapter will describe how you can view each type of request.

Viewing a Change Request

Within a Case

Change requests are recorded in the worklog section of a case – see previous chapter. The Change Request list in the case worklog will only be displayed if the case has any associated Change Requests.

To view details about a Change Request, scroll to the Change Request list in the case worklog and click the Change Request ID for the relevant Change Request. This will open the detail view shown below.

Note. All Change Requests that were migrated to the new tracking tool will appear with a status of Cancelled in the search results.
Searching Change Requests

You can search for all Change Requests submitted against a single product and version. For example, to see what fixes are included in a later version of your product which you are considering updating to.

To perform a Change Request search, click the Change Request View tab in the Customer Portal menu bar. In the form displayed fill in a product and a version and press Load. The results from your search will be presented in the following format.

Note. All Change Requests that were migrated to the new tracking tool will appear with a status of Cancelled in the search results.

Click on the Change Request ID to view the detail view for the selected Change Request – see figure 23 above.

Viewing a PD Issue

Within a Case

As of January 1st, 2020, all code changes and fixes are tracked as PD Issues. PD Issues are listed in the PD Information section of a case – see figure 16 above. This section will only have content if a PD Issue has actually been associated with the case.

When one (or more) PD Issue(s) exist in a case they will be displayed in the PD Information section as shown below.

The information displayed on a PD Issue includes the following new fields:

- **Fix Version** – This field indicates the targeted or actual version in which an issue was fixed dependent on the status of the PD Issue. When Issue Status is Done the Fix Version is actual and in all other situations it is targeted.

  Note. The fix version may change if still only a target version, as in work on resolving the PD Issue is still in progress. This may occur due to added complexity or failed quality testing making it mis code deadline for example.

- **Resolution** – This field will provide information on how the issue was resolved.
You can open the PD Issue detail view by clicking on the **PD Issue Key**. This will display the following view with details on the PD Issue.

![Figure 26. PD Issue detail view](image)

**Searching PD Issues**

There is currently no feature available that would allow you to search all PD Issues for a given product and/or version matching the **Change Request View** described above. If you find you do need, for example, a list of all PD Issues fixed/released against a specific product/version you are planning to upgrade to, please contact your CX representative with the details. They will be able to create a list which they can submit to you.
Reports and Dashboards

The Customer Portal provides you with tools to get an overview of your cases, open and closed, with ABB Customer Experience (CX) in the form of **Reports** and **Dashboards**. This chapter describes how you use these tools and how you can request additional reports or dashboards.

Customer Portal Reports

To view reports, click the Reports tab on your Customer Portal home page. The figure below shows the resulting view with the key areas/features highlighted and described below the figure.

![Figure 27. Reports view in Customer Portal](image)

1 – **List of Folders**

The left side of the report view contains a list of report folders you have access to. The figure above displays the three default folders available to all customers, but your view may show more folders depending on the configuration and needs of your organization. Above the list of folders is a search function to allow you to search for a specific folder.

By default, all folders are selected and any searches for a specific report (see below) will result in all folders being included in the search. Select a single folder by clicking its name. This will limit all searches to just that folder and update the list of reports (see below) to show the contents of this folder only.

2 – **List of Reports**

This area will display a list of reports depending on your folder selection, filter settings (see below), and search criteria. By default, the list will display a list of the reports and dashboards you have most recently viewed.

To open a report (or dashboard) from the list click the name of the report.

At the beginning of each line you can access a couple of actions

– For reports you can create an export of the report data in a comma separated format
– For dashboards you can choose to follow the dashboard and receive notification when it is updated
3 – Report List Filters

Two filters exist to control which reports (and dashboards) are displayed in the report list

- Based on your connection to a report; options are
  - All Items
  - Recently Viewed
  - Items I’m Following
  - Items I Created

- Based on type; options are
  - All Types
  - Reports
  - Dashboards

4 – Searching for Reports

You can search for a specific report by entering a search string in this field. The search will match you search string against the report (or dashboard) name and display the results in the report list.

By default, the search will search through all folders you have access to. You can limit your search to only reports in a single folder by selecting that folder from the folders list prior to initiating your search.

Viewing a Report

The figure below shows the view of a sample report. Highlighted areas are described below the figure.

![Sample report view](image)

**Figure 28. Sample report view**

1 – Report Options

The report options allow you to control what data the report will display. You can select how data is summarized, what cases to show, what date field to use for selection, and which start and end dates the report should cover.

ABB CX recommends that you only update the start and end dates in this section. If you have specific needs, please consult with your CX representative on how best to achieve the results you are looking for.
2 – Action Buttons

The action buttons allow you to take specific actions on the report being viewed

- Run Report – asks the system to run the report again. Note that you will need to re-run the report if you make changes to the date interval from which cases are selected.

- Hide Details – toggles between displaying all data or just a summary of data. Note button will change to Show Details when a summary view is in use.

- Printable View – allows you to create a printer formatted view of the report which can be loaded into Excel for printing.

- Export Details – allows you to export report data in a comma separated format

3 – Report Data

Is where the actual data produced by the report is displayed. Which columns and data are displayed depends on how the report was built. You can sort the report by a column by clicking on the column name.

You can access a single case by clicking on the case number for the relevant case in displayed in the report.

Customer Portal Dashboards

Dashboards provide a highlevel graphical summary view of a specific area of your organization’s interaction with ABB through the Customer Portal. There are two ways in which you can open a dashboard for viewing

- You can select the dashboard from one of the lists displayed under the Reports tab as described above

- You can click the Dashboards tab in your Customer Portal menu bar

Either method will provide a view as shown in the figure below.
1 – Dashboard Search

Allows you to search for another dashboard than the one currently being displayed. The system will try to match your text string to the name of any dashboard you have access to and display a dropdown list of matches for you to select from.

Use the Refresh button to refresh the data displayed in the dashboard. The date displayed to the right of the Refresh button indicates when data displayed was last extracted.

2 – Dashboard

The actual dashboard you have asked to view. If you opened the dashboard view using the Dashboards tab in the menu bar, you will be default be shown the last dashboard you have viewed.

Note. By default, all customers only have access to the Case Dashboard shown in figure 29 above. Additional dashboards to meet the needs of you or your organization can be requested as described below.

Requesting Special Reports or Dashboards

Every customer is provided with access to a set of default reports and dashboards. As you use Customer Portal and your number of cases grows you may find yourself in a situation where the existing reports no longer meet your needs, like for example in connection with an upgrade or expansion project.

In this situation please reach out to your CX representative to have a discussion about how the data you need can be provided. You may agree upon a one off report which your CX representative can extract and send to you as a mail attachment, or you may find that a new report only for your organization is required. In both cases please have a clear description of what data you need and why you need the data, as this will help in understanding and assisting you to the right solution.

Note. Generally any data you can see in the Customer Portal when viewing a case can be included in reports with a few exceptions due to reporting formats. Most challenges with new reports will be found in the selection and filtering of data to be included in the report. Your CX representative will always try to work with you to arrive at a solution that closest matches your needs.
Workspaces, Content, and Subscriptions

Workspaces, Content, and Subscriptions are part of a software repository providing you with the ability to download software updates from ABB Power Grids so your organization may apply these to your systems. This ability is not relevant to all customer organizations, and the ability should also be limited within organizations using it to ensure proper version control on your systems.

Depending on the needs of your organization and your Customer Portal profile, you may not have access to any of the functions listed under Workspaces, Content, or Subscriptions. If you are in doubt about whether you have access or believe you should have access but cannot see anything, please reach out to your CX representative for assistance.

Workspaces

Workspaces can be compared to file folders and are used to organize and hold related software components (Content) for easy navigation. Click the Workspaces tab in the Customer Portal menu bar to open the workspaces home page – see figure below.

![Workspace home page](image)

*Figure 30. Workspace home page*

On the home page you will be presented with a list of the workspaces you are a member of (have access to), as well as a list of top content sorted by publication date. If you are not a member of any workspaces a message will be displayed to that effect.

![No workspace memberships registered](image)

*Figure 31. No workspace memberships registered*

To open a workspace and view the contents of that workspace simply click on the Browse link next to the relevant workspace in the list provided.
Content

Content are the actual software packages available for download. You can view all content available to you or you can view all content available to you within a given workspace.

You can access content in two ways

- By selecting a workspace as described above. This will give you a view of all content stored in this workspace only. To open the content for downloading click the **Browse** button above the content list.

- By clicking on the **Content** tab in the Customer Portal menu bar. This will give you a view of all content you have access to.

Using either method you will notice that the **Content** tab in the menu bar is highlighted to indicate you are viewing content. Your screen will appear similar to the figure below.

![Figure 32. Content view](image)

The main areas of the content view are

1 – **Filter Menu**

You can use the indicated filters to limit the amount of content which is displayed.

2 – **Content Search**

Searching for content provides you with two options to limit the search

- Where to search for content. You can either select all workspaces or a single workspace. This option is mandatory.

- A text string to search for which the system will try to match to the content title. Entering a text is optional.

If you only select a workspace and execute the search by pressing **Go** you will be shown all content within the select workspace (same as if you selected to view a workspace as described in the previous).
3 – Content Display

In this area you will be presented with a list of all the content matching your search criteria/filter settings and which you have access to.

You can control how content is displayed by pressing the **Display Options** button above the list of content on the right. A form will be shown allowing you to customize the view. In general, the default view should be sufficient.

To download content, you need to first select which packages you want to download by placing checkmarks in the checkboxes in the leftmost column on the display. Once you have selected all the packages you want to download click the **Download** button above the listed content on the left.

Alternatively, you can view additional details about a specific content package by clicking the name of the package. This will open a view similar to the below figure. To download the package simply click the **Download** button at the top of the view (this downloads only the package being viewed).

![Content package detail view](image)

**Figure 33. Content package detail view**

Subscriptions

Subscriptions allow you to receive automated e-mail notifications when workspaces or content are updated (new content added, or new versions of content released). You can subscribe to individual workspaces or content in any combination that meets your needs, or you can select to subscribe to all workspaces and/or content.

When viewing workspaces, subscription is indicated by the leftmost icon in the list of workspaces – see figure 30 above. For content the same icon is used but is second leftmost – see figure 32 above. The icons have the following meaning

- Indicates a workspace/content being subscribed to
- Indicates a workspace/content not subscribed to

To subscribe (or un-subscribe) to a workspace/content simply click the icon next to the item you wish to subscribe to. The icon will change color to match your selection.