

## Using the Client Portal

Provided by:



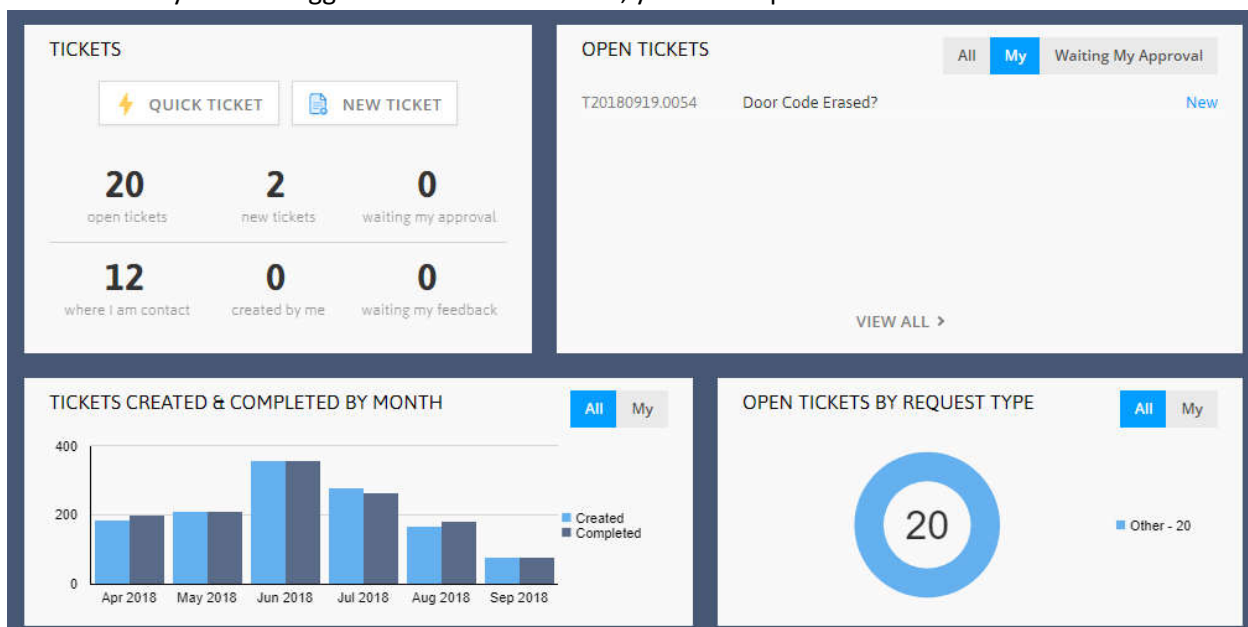
The client portal is designed so you can inform SmartPath of technical problems, track the resolution of those issues, and see the history of past problems you have encountered and how they have been solved.

### Accessing the Portal

The portal is also available directly at [www.smartpathsupport.com](http://www.smartpathsupport.com) Feel free to bookmark the link for easy reference.

### Creating a Ticket

1. Use your provided username and password to login to the portal. The username will be your email address. If you don't have or forgot your password, call SmartPath at (270) 205-4709 for assistance.
2. Once you have logged into the Client Portal, you will be presented with a screen like this:



Click on the “New Ticket” button. The Quick Ticket button works as well, but does not allow you to provide as complete details, which can hamper the speed of resolution.

3. Drop down under Request Type, and pick the type of problem you are having. If none of the options look correct, pick “General Request”. Then, select the priority of the ticket:
  - a. Critical – Over 90% of your office is unable to work at all. Examples of critical priority: Network and/or Wireless outage, server failure, or all users are unable to work in

software packages your office utilizes on a regular basis. When you have an emergency, you are our top priority and we focus all efforts necessary to get you back to normal functionality as soon as possible.

- b. High – Defined as 10-40% of the users/computers being totally unable to work, internet outage, retrieving lost files from backup, a printer not working for an internal deadline you have such as meeting, a single PC has a virus or spyware infection, or a single component of a software package you utilize regularly is unable to work.
- c. Medium – Can be defined as one computer/user unable to perform one function but is able to continue working in other applications or by using an alternate computer. Problems with certain programs on one computer is generally classified as medium priority.
- d. Low – General questions, problems that don't affect users ability to work. Configuring your application to print to a different printer, setting up a scanner, or application issues such as using a webcam to take patient pictures or being able to put a scanned picture into a document. **If it doesn't affect your ability to keep working, it's probably low priority.**

This is just a guide. We give you the ability to judge the level of your problem. However, when we get the ticket, we can change the priority if we deem it categorized incorrectly. Keep in mind all tickets submitted, regardless of priority, will be addressed within the timeframe defined by your contract level.

- 4. In the ticket title field, put in a brief summary of the issue, for example, "Can't print to the LaserJet 4050." In the description field, put a detailed description of the issue you are having, for example, "When I try to print to the printer from Microsoft Word, I get an error message saying the printer is offline. I can print to the copier with no problem."
- 5. In the next section, your name will be the default selection and doesn't have to be changed. If you are reporting the problem for someone else in your organization, you can drop down and pick the name of the person for whom you are submitting a service request for.
- 6. Next, choose a configuration item if possible. A configuration item is SmartPath's way of documenting information about a piece of hardware or software, such as a computer or printer. Selecting the appropriate configuration item can save the technician time instead of calling and asking which device is having the problem. You do not have to select a configuration item. To do so, click the 3 boxes next to the 'Configuration Item' field to be given a list of devices to choose from.
- 7. The last section, Follow-Up Questions, will provide valuable information to that will allow us to troubleshoot and resolve the issue much quicker. The follow on questions will be specific to the type of request you indicated at the top. For example, if you pick "Printer Problems" at the top, the Follow-On questions will be things like, "What printer and where is its location? Can anyone else print to the printer? Does printing to an alternate printer work?" These questions will allow us to handle the issue much quicker than having to call and ask you the introductory questions to begin working on your problem.

### **Viewing and Editing Your Existing Tickets**

1. From the main login page, there is a section titled Open Tickets which will display tickets you have access to see. You can filter by All, or just your own tickets, or tickets waiting on a response from you. You will see a ticket number (which is formatted as a date) and the ticket title. Click on the ticket, and you'll be taken to a screen that shows all of the information about this support request, what work has been done on the ticket, and where the ticket currently stands.
2. You will notice at the top of the ticket screen an "Add Note" and "Add Attachment" button. While we are working on an issue and have your ticket open, you can use the "Add Note" to submit additional information to us regarding the ticket. If you click the add attachment button, it will allow you to upload an attachment – for example a Word document or a screenshot of an error message you are receiving, or a copy of a file you are having a problem with.

If you have any questions or require assistance, please contact SmartPath by email or calling 270-205-4709.