

Clearview Customer Web Access

This document outlines the Clearview Process flows for

- Logging in to Customer Web Access
- Service Listing
 - Service Order Desktop
 - Service Tasks
 - Viewing Service Schedules
 - Viewing Activity Lines (Parts / Expenses)
- Call Listing
 - Call Center Desktop
 - Call Tasks
- Knowledge Base Articles related to Call Tasks
- Searching the Knowledge Base
- Reporting

Nexterna Contact Information

Address:

Nexterna Limited
3060 Mainway, Suite 100
Burlington, Ontario L7M 1A3
Telephone: (905) 319-8378
Fax: (905) 319-8397
Web URL:

<http://www.nexterna.com>

E-mail:

support@nexterna.com

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Print Record

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1.0 Introduction

Clearview Customer Web Access does not require a client install; the application is installed on the Clearview server and is accessible via an Internet Connection. The application communicates real-time with the Clearview database instantly updating information and displaying accurate real-time data.

The application offers customers the ability to:

- view, add, and edit call center calls (phone support/help desk calls)
- view, add, and edit call service calls (on site calls)
- browse service history by customer / equipment
- view/print reports
- search Knowledge Base articles

2.0 Logging in to Customer Web Access

Launch Internet Explorer and enter the provided URL to display the Clearview Web Access Login form. Enter the credentials provided including your Clearview Logon ID, Password, and the Configuration.



Nexterna™
Clearview

Web Access

Logon ID

Logon Password

Configuration

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3.0 Customer Web Access Home Page

Once logged in, the customer is navigated to a home page displaying a welcome message that pulls the first/last name from their Clearview User Profile Record. The default home page includes five distinct sections:

- Service Order Listing
- Call Listing
- Available Reports
- Knowledge Base

Quick links automatically navigate to the selected section of the home page.



For each section, a table is displayed in a Clearview browser. The records returned in the browser can be modified using the Filter option. The user can use the print view button to open the results in a printer-friendly format. The user can navigate into the details of each record or click the Add button to add a new record.

3.1.1 Service Order Listing

The Service Order Listing displays Service Orders according to the default browse configuration. In the example below, the Service Listing is displaying all Open Service Orders for the customer / customer location that the logged in user has access to. From the Service Listing, the user can drill down into the specifics of the service order by clicking on the service # link.

Service Order Listing | Add...

Browser Configuration: Filter... Print View...

Service #	Status	Address	City	Z
5000026	Assigned	101 Main Streeat East	Hamilton	L8L 8
5000028	Dispatched	101 Main Streeat East	Hamilton	L8L 8
5000030	Assigned	101 Main Streeat East	Hamilton	L8L 8
5000031	Open	101 Main Streeat East	Hamilton	L8L 8
5000032	Open	101 Main Streeat East	Hamilton	L8L 8
5000034	Assigned	101 Main Streeat East	Hamilton	L8L 8
5000035	On Hold	101 Main Streeat East	Hamilton	L8L 8

Records: 100 / 166

3.1.2 Call Listing

The Call Listing is similar to the service order listing but displays call center records for the customer / customer location that the logged in user has access to.

Call Listing | Add...

Browser Configuration: Filter... Print View...

Call #	Status	Site ID	Address	City
5000081	EN	1	5515 North Service Road	Burlington

Records: 1 / 1

3.1.3 Available Reports

The available reports table displays a listing of available reports. When clicking on the report name link, the user is navigated to the report parameters screen to enter details and launch the output.

Report Name	Description
call_center	Call Center Listing
service_history_cust	Service History by Customer

3.1.4 Knowledge Base

The Knowledge Base header offers the ability for users to open a browser using the Details link to search published Knowledge Base articles.

Knowledge Base	 Details...
----------------	------------------------------

4.0 Service Order Desktop

4.1. Adding/Updating Assigned Service Orders

Through Customer Web Access, users have the ability to add new service orders to the system (if the appropriate security permissions are granted). To add a new service order to the system, the user will click the Add option on the home screen. This will navigate them to the Service Order Details screen with fields open for entry. The customer number will default based on the user logged in, and the required location may either default or be available for browsing based on the user setup in Clearview. Users can only add Service Orders for customer locations they have been given access to.

After entering the required customer location, the user can select Save to enter the record and expose the yellow memo icon and the add options on the tabs.

To update an assigned service order, the user will navigate into the record from the home screen and select the Modify button. On the Service Order Details screen, the user can view their customer details and the history of service at the site or can navigate into the tabs at the bottom of the screen to view/edit/add information. The screen also allows a user to enter a new customer / customer location or contact, if the appropriate security permissions are granted.

End Client Web Access

[New](#) [Modify](#) [Save](#) [Cancel](#) [Help](#)

Service Listing -> Service Details

Service Order Details - #5000157
Status - Assigned
📄

Service Details
| [Print](#) | [History](#)

Entry Time:	06/24/2008	10:46 AM	Due Time:	06/25/2008	10:00 AM	Request Time:	<input type="checkbox"/>		
-------------	------------	----------	-----------	------------	----------	---------------	--------------------------	--	--

Customer Details
| [New](#)

Customer:	MCMASTER	Location:	1	Contact:	Chris	Smith
Name:	McMaster Uni (LOC1)			Phone #:	905-527-1111	Ext: <input style="width: 40px;" type="text"/>
Address:	101 Main Street East			P/O #:		
				Document #:		
City:	Hamilton					
State/Prov:	ON	Zip/Postal:	L8L 8L7			
Country:	CANADA					

User Defined Fields

User 1:	
User 2:	
User 3:	

Tasks

[Schedules](#) [Activity Lines](#) [Returnable Parts](#)

Service #	Task #	Status	Contract #	Item #	Serial #	Serv
5000157	1	Assigned		Dell Power Edge 6600	111-555	FullWarr

Add...
Filter...
Print View...


Previous Next Records: 1 / 1

4.1.1 Task Details



On the Task details screen, the user has the ability to add/edit/view the history of the product, coverage details, and the service and task details. Located below the End Client Web Access banner, links to previous screens provide for the ability to navigate back to the main service order screen. The New button along the top banner allows the user to add a new task to the service order.

End Client Web Access New Modify Delete Save Cancel Help




Service Listing -> Service Details -> **Tasks Details**

Task Details - Service #5000157, Task #1  History




Product Details

Item #:  Quad Xeon Processor MP 7U Tower
Serial #: 
Alt Ref: Revision:


Coverage Details

Service Type:  Warranty Labor and Parts
Coverage Code:  Regular Hours
Priority Code:  Severity 4 - Low
Contract: Contract
Warranty: Vendor Seller Manufacturer
Duration: Due Date/Time:

Service Details

Problem Code:  To Be Determined
Cause Code:  To Be Determined
Repair Code:  To Be Determined

Task Details

Status:
 Reschedule Reason Code: 

Attachments

Attached:
Attach New:

User Defined Fields

User 1:
User 2:
User 3:

The user can update the Problem / Cause / Repair codes related to the service provided for each task.

The yellow memo icon across the Task Details banner opens a screen for adding or viewing associated task memos.

Service Order Task - Memo Details

Previous Next New Modify Delete Save Cancel Close Help

Type: Number:

Memo:

Created By: Created On:

Modified By: Modified On:

4.1.2 Schedules

The schedules tab opens a screen that displays service time entries as well as the calculated Travel, Labor and related Overtime based on the times entered on this schedule record. The user can not make changes to this area of the Service Order – this form is read only access and does not offer any toolbar options on the menu.



End Client Web Access

Help

Service Listing -> Service Details -> Scheduling Details

Schedule Details - Service #5000157, Sched #1 Status - Assigned

Scheduling Details

Task #:	<input type="text" value="1"/>		
Technician:	<input type="text" value="BRIAN"/>		Brian Hines
Schedule Date:	<input type="text" value="06/26/2008"/>	<input type="text" value="01:01 PM"/>	ETA Date: <input type="text"/>
Notify Date:	<input type="text"/>	<input type="text"/>	Duration: <input type="text" value="000:02:00"/>

Coverage Details

Accepted:	<input type="checkbox"/>	Check if the Technician has Accepted this assignment	Travel:	<input type="text" value="000:00:00"/>
Dispatch Date:	<input type="checkbox"/>	<input type="text"/>	Labor:	<input type="text" value="000:00:00"/>
Arrive Date:	<input type="checkbox"/>	<input type="text"/>	Overtime1:	<input type="text" value="000:00:00"/>
Complete Date:	<input type="checkbox"/>	<input type="text"/>	Overtime2:	<input type="text" value="000:00:00"/>
Return Date:	<input type="checkbox"/>	<input type="text"/>		

Break Times

4.1.3 Activity Lines

The activity lines tab navigates the user to a screen where labor, parts, expenses, etc. on the related Service Order can be viewed. Links to the related service activities are not available in Customer Web Access; however any parts used on the call, along with labor and travel details are viewable by the user.

Service #	Task #	Line #	Item #	Description	Serial #
5000044	1	1	LOT_STOCK_RETURN	Lot Controlled Stockable and Returnable	
5000044	1	3	Travel Zone Charge - Zone 1	Travel Zone Charge - Zone 1	
5000044	1	4	Travel	Travel Hourly Charge	
5000044	1	5	Labor	Labor Hourly Charge	
5000044	1	6	Labor	Labor Hourly Charge	

Records: 5 / 5

4.1.4 Returnable Parts

On the returnable parts screen, users can view returnable part entries. These are parts that are tracked back to a Clearview warehouse for logistics processing. Links to the related returnable parts are not available in Customer Web Access; however the records are viewable on this form.

Service #	Task #	Line #	Item #	Description	Serial #
5000044	1	2	LOT_STOCK_RETURN	Lot Controlled Stockable and Returnable	

Records: 1 / 1

5.0 Call Listing

5.1.1 Adding/Updating Call Listing Records

The Call Details screen displays the status of a customer call with the associated Tasks entered.

The screenshot shows the 'Call Details' screen for call #5000105. The interface includes a header with the Nexterna Clearview logo and 'End Client Web Access' text. Navigation buttons for 'New', 'Modify', 'Save', 'Cancel', and 'Help' are present. The main content area is divided into 'Call Details' and 'Customer Details' sections. The 'Call Details' section shows entry and due times. The 'Customer Details' section includes fields for customer name, address, and contact information. Below this is a 'User Defined Fields' section with three input boxes. At the bottom, there is a 'Tasks' section with a table and navigation controls.

Call Details - #5000105 **Status - In Progress**

Call Details **Customer Details** | Print | History

Entry Time: 10/03/2008 11:40 AM Customer: MCMASTER Locations: 1

Due Time: 10/04/2008 11:40 AM Name: McMaster Uni (LOC1)

Address: 101 Main Street East, Hamilton, ON

Contact: Chris Smith P/O #:

User Defined Fields

User 1:

User 2:

User 3:

Tasks **Activity Lines**

Call #	Task #	Contract #	Item #	Serial #	
5000105	1	5000110	Dell Power Edge 6600	111-8745	DEBB

Navigation: Previous Next Records: 1 / 1


5.1.2 Call Tasks

The Call Task screen displays the issue raised by the customer. The user can enter or view the product (equipment), coverage, service and task details. The user can update the service detail codes (problem/cause/repair) and/or can update the stage code based on progress.



At the bottom of the screen, the Knowledge Base tab displays any articles that have been published and are available to the user. The user can use the filter button to locate articles specific to the product/problem code and open the record to review the article.

End Client Web Access [New](#) [Modify](#) [Save](#) [Cancel](#) [Help](#)




Call Listing -> Call Details -> Tasks Details

Call Task Details - Call #5000105, Task #1  [History](#)




Product Details

Item #:  Quad Xeon Processor MP 7U Tower
Serial #: 
Alt Ref: Revision:

Coverage Details

Service Type:  Time and Material Discount 20% Labor
Coverage Code:  Regular Hours
Priority Code:  Severity 4 - Low
Contract: Contract **Contract #:** 5000110 **Start Date:** **End Date:** **Contract Type:** RETAINER
Warranty: Vendor Seller Manufacturer
Duration: Due Date/Time:

Service Details

Problem Code:  To Be Determined
Cause Code:  To Be Determined
Repair Code:  To Be Determined

Knowledge Base Articles related to Call Task

The knowledge base screen will display the product and problem/resolution details for a specific article. In addition, the yellow memo icon provides additional information for the knowledge base record. Click the link to open the knowledge base article details:

Document #	Title	Item #
5000000		Dell Power Edge 6600
5000009	Test Knowledge Base Article	10' 25 pin M-F
5000013	Outlook, Attachment, Email Header	MS Outlook

Click the memo button to display additional information about the knowledgebase article:

End Client Web Access Help

Call Listing -> **Knowledge Base Details**

Knowledge Base Details

Document #: Status:

Title:

Item Product Details

Item #: Microsoft Outlook

Alternate:

Problem/Resolution Details

Problem Code: Configuration Question

Cause Code:

Repair Code:

Knowledge Base - Memo Details

Type: Number:

Memo:

6.0 Knowledge Base

Customers can use this tool to search the Clearview Knowledge Base for articles for specific equipment / problem code.

To search the Knowledge Base, click the Details button:

Knowledge Base | [Details...](#)

This launches the Knowledge Base Browser:

Knowledge Base Browser - Microsoft Internet Explorer

Find Now Print Close Help

Browser Configuration: Approved Documents by Task | Hide Filter <<<

Filter Criteria Sort Criteria SQL Statement

Field Name	Condition	Value	And/Or	Literal
Status	=	AP	AND	<input checked="" type="checkbox"/>
Item #	=	MS Outlook	AND	<input checked="" type="checkbox"/>
Problem	=		AND	<input checked="" type="checkbox"/>
Cause	=		AND	<input checked="" type="checkbox"/>
Repair	=		AND	<input checked="" type="checkbox"/>

Document #	Title	Status
------------	-------	--------

Previous Next Records: 0 / 0

The user can enter a value in the Item # field and can choose to also include a specific Problem, Cause and/or Repair code to limit the results returned from the database.

Once the values have been entered click the Find Now button, this will return the results:

The screenshot shows a web browser window titled "Knowledge Base Browser - Microsoft Internet Explorer". The interface includes a navigation bar with "Find Now", "Print", "Close", and "Help" buttons. Below this is a "Browser Configuration" section with a dropdown menu set to "Approved Documents by Task".

The main area is divided into three tabs: "Filter Criteria", "Sort Criteria", and "SQL Statement". The "Filter Criteria" tab is active, displaying a table with the following columns: "Field Name", "Condition", "Value", "And/Or", and "Lite".

Field Name	Condition	Value	And/Or	Lite
Status	=	AP	AND	<input checked="" type="checkbox"/>
Item #	=	MS Outlook	AND	<input checked="" type="checkbox"/>
Problem	=		AND	<input checked="" type="checkbox"/>
Cause	=		AND	<input checked="" type="checkbox"/>
Repair	=		AND	<input checked="" type="checkbox"/>

Below the filter criteria is a search results table with the following columns: "Document #", "Title", "Status", "Item #", "Description", and "Problem".

Document #	Title	Status	Item #	Description	Problem
5000013	Outlook, Attachment, Email Header	AP	MS Outlook	Microsoft Outlook	config

The user can click on the Document # Link to view the Knowledge Base Article and any associated memos.

7.0 Reports

After selecting a report to generate, Customer Web Access will navigate the user to the appropriate parameters screen. This allows users to enter the specific criteria for output and submits the information for processing.

In the following example, the user chose to print a Service History by Customer report:

Enter Service History by Customer Report Parameters

From Customer:	<input type="text" value="ABCCO"/>		
To Customer:	<input type="text" value="ABCCO"/>		
From Item #:	<input type="text"/>		
To Item #:	<input type="text" value="////////////////"/>		
From Entry Date:	<input type="text" value="01/01/2008"/>		
To Entry Date:	<input type="text" value="10/31/2008"/>		

The user enters their customer number in the From / To Customer fields, the date range in the From / To Entry Date fields, then clicks the Submit Parameters button.

The output for the report will be displayed to the user.

Service Summary Listing

Manager: Bob Wainright (BWAINRIG)						
Technician: (BSMITH)						
Service #	Customer	Entry Date	Contact Name	Status	Total Amount	
5000029	York University (YORKUNIV)	02/01/2006 01:17 PM	Chris Jones	Assigned	\$0.00	
Service Item Description (Item #)	Serial #	Due Date	Priority	Serv Type	Task Status	
Dell Ultra Sharp 2001 FP 20.1 " Monitor (Dell		02/01/2006 02:17 PM	Sev1	TM	Assigned	
Service #	Customer	Entry Date	Contact Name	Status	Total Amount	
5000030	McMaster Uni (LOC1) (McMASTER)	02/20/2006 04:04 PM	Chris Smith	Assigned	\$0.00	
Service Item Description (Item #)	Serial #	Due Date	Priority	Serv Type	Task Status	
Quad Xeon Processor MP 7U Tower (Dell	111-555	02/21/2006 04:04 PM	Sev4	FullWarr	Assigned	
Service #	Customer	Entry Date	Contact Name	Status	Total Amount	
5000054	York University (YORKUNIV)	04/11/2006 07:00 AM	Chris Jones	Assigned	\$0.00	
Service Item Description (Item #)	Serial #	Due Date	Priority	Serv Type	Task Status	
Dell Fibre Channel RAID Array (Dell EMC Fibre		04/12/2006 09:00 AM	Sev4	TM	Assigned	
NOTES FOR MEMO TYPE: Customer Notes						
CUSTOMER INDICATES TECHNICIAN ATTEMPTED REPAIR LAST MONTH.						
Service Item Description (Item #)	Serial #	Due Date	Priority	Serv Type	Task Status	
Dell Ultra Sharp 2001 FP 20.1 " Monitor (Dell		04/11/2006 10:00 AM	Sev1	TM	Assigned	
NOTES FOR MEMO TYPE: Customer Notes						
USER INDICATES DISPLAY IMAGE APPEARS 'FUZZY'.						

The user can choose to Print the output, by choose File in the menu bar, and Print.

When finished with the report, the user can click the Internet Explorer Back button to return to Customer Web Access.

