How to Manage Open Support Cases

When working with your Support Organization, your case may pass through several stages on its way to resolution. Just as you have the responsibility to set the priority on open support cases, you also confirm closure on each support case. All open support cases are available for update through Online Support Incidents.

Several options are available when managing open requests for Support.

A successful relationship begins with consistent and understood expectations between all parties. Please familiarize yourself with the support team's hours of operation and call priority service goals for issue resolution.

Confirming case closure is an important piece of our teamwork equation.

Closure takes place in three forms:

- You resolve the issue without Technical Support assistance;
- Support provides a resolution that you confirm;
- A software defect correction is completed by Product Development and released;

Use the following steps to take action on open support cases.
- Access Online Support Incidents on Tyler's web site (www.tylertech.com)
- On the My Cases screen, Choose the My Cases – Open view to manage support cases where you are the primary contact. Choose the All Accounts – Open Cases if you are a Super User with responsibility beyond cases where you are the primary contact.
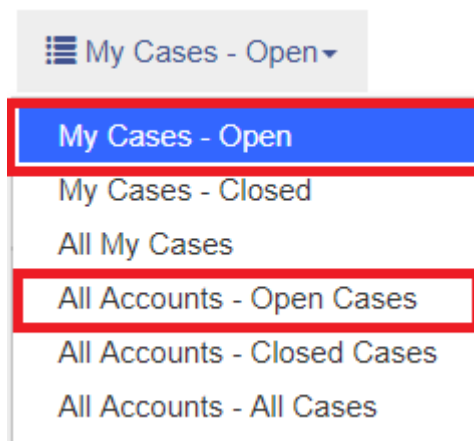
- Cases with the following statuses will be presented - New/Not Started, Open, Need More Info, Waiting for Customer to Close, Ref to Dev, Work Ticket, Waiting for Build, Update Available

The case list includes the current status of the support case:

The following chart shows the case Status values used by Technical Support and update options available to you.

Case Status	Update Action	Notes
Open	Close Case	Add notes, escalate and add attachments; use Close Case if you no longer require assistance
Work Ticket	No update	Add notes, escalate and add attachments; support will update when the item is completed and released
Waiting for Customer to Close	Close Case Open Case	Indicates Support has provided a recommended resolution and is waiting for you to confirm closure or reopen the ticket within 30 days if the resolution provided does not resolve the issue. If the resolution resolved the issue, use Close Case to change the status to closed. If the resolution did not address the question, us Open Case to request further assistance from support.
Need More Info	Open Case Close Case	Support cannot move this item forward until you complete specified actions; once you have taken action, use Open Case to change the status to Open if there is further action for the Support Organization. If you no longer require assistance, use Close Case to change the status to Closed.
Ref to Dev	No update	Add notes, escalate and add attachments; support will update when the item is completed and released
Waiting for	No update	Add notes, escalate and add attachments; support will update when the

Build		item is completed and released
Update Available	Close Case Open Case	Indicates the defect correction or software update is available to download or in a version release. Once you load the change, there are two options. If the correction addressed the issue, use Close Case to change the status to Closed. If the software update did not address the issue, enter a comment detailing why this issue remains unresolved, and use Open Case to change the status to Open.

Optionally export the case list to excel for local distribution and management.

Choose *Export Cases*

An export file is created.

Chrome: click the drop down arrow to open:

For more information, visit www.tylertech.com

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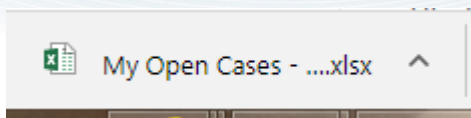
Internet Explorer: Choose Open, or drop down next to Save.

Id	Created On	Status Reason	Case Title	Priority	Assigned	Product S	Product Module	Program	Recommer	Customer	Primary C	Modified On
6088353	3/13/2018 15:53	Waiting for Customer to Close	Can we us	2 - High	Patty Lein	MUNIS	Personnel Management	Personnel Actions		Munis, A	Patricia Le	3/19/2018 11:40
5516963	6/7/2017 14:53	Update Available	Client is re	3 - Medium	Kellie Clar	MUNIS	ESS Employee Self Service	ESS	11.2.0.0	Munis, A	Patricia Le	3/20/2018 12:31
5513588	6/6/2017 12:26	Update Available	Errors on r	2 - High	Patty Lein	MUNIS	ESS Employee Self Service	Admin/Migrate Users	11.2.0.0	Munis, A	Patricia Le	3/15/2018 8:54
6117314	3/19/2018 7:05	Open	I'm lookin	3 - Medium	Patty Lein	MUNIS	General Billing	Import/Export		Munis, A	Patricia Le	3/20/2018 13:42
6117258	3/15/2018 10:21	Waiting for Customer to Close	Is there a	3 - Medium	Patty Lein	MUNIS	Salary and Benefit Projections	Cubes		Munis, A	Patricia Le	3/18/2018 17:27
6117323	3/20/2018 13:37	New/Not Started	is there ar	3 - Medium	MUNIS TA	MUNIS	General Billing	Import/Export		Munis, A	Patricia Le	3/20/2018 13:38
6117325	3/21/2018 9:28	New/Not Started	Is there ar	3 - Medium	MUNIS FIN	MUNIS	General Ledger	Year End		Munis, A	Patricia Le	3/21/2018 9:28
6117256	3/15/2018 10:03	New/Not Started	Looking fc	3 - Medium	MUNIS FIN	MUNIS	Bus Trips			Munis, A	Patricia Le	3/20/2018 11:13
6088345	3/13/2018 11:29	Open	Looking fc	3 - Medium	Patty Lein	MUNIS	General Ledger	Year End		Munis, A	Patricia Le	3/13/2018 11:33
6117322	3/20/2018 11:46	Open	Questions	1 - Critical	Patty Lein	MUNIS	General Ledger	Month End Manager / Processing		Munis, A	Patricia Le	3/20/2018 12:10

Results

Case statuses give you the capability to take action on cases and manage the final closure of support cases. Managing closures keeps the Online Support Incident open list complete and showing just those items truly in need of action by you or Support.

After you update a case status in Online Support Incidents, the change is available to the Support Organization real-time. The assigned technician is notified of the status change with a message alert. A technician will take action on outstanding open items.