TeamSupport User Guide

www.harrisschoolsolutions.com

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Let's Get Started!

Contacting Support

When working with a Support Specialist on existing issues, we welcome e-mail communication! However, please do not initiate a new issue by e-mailing the Specialist directly, as this might delay our prompt response. Please mail the specified help desk accounts below, call the hotline, or use our Support Site for any new issues.

- **Support Hours**
  Support hours are Monday - Friday **7:00am to 4:00pm (**Eastern Time Zone)
  Please note: Support hours may be impacted by holiday schedules.
  Be sure to check the Landing Page for events, news and educational webinar schedules.

- **Email Us**!
  Customer can open a ticket via email by simply sending an email with the required support information to: **ctesupport@harriscomputer.com**

- **Call Us!**
  The support team can be reached by phoning **(855) 984-1228, option 1**

- **Login to the Customer Hub!**
  Simply browse out to: https://cte.na2.teamsupport.com to access your account and directly open tickets, as well as view and track the status of any existing cases.   Be sure to bookmark this site for easy access**.**

Helpful Information When Creating Cases:

- If emailing or calling, please provide your name and verify your contact details.
- Please specify the specific application to which your call applies (e.g. Classmate CTE, ClassMate Adult Ed, AIM, ClassMate Teacher Web, District Portal, Gateway, etc.)
- If applicable, indicate if the problem appears to be happening on MAC/PC/Android/iPad and version of the operating system, as well as the browser name (i.e. Chrome, Firefox, Internet Explorer, etc) and version.
- Location details – e.g. Is the issue only happening in one school or a certain time of the day?
- Error message details – if applicable provide the full text of any error messages
- Steps to reproduce – please provide the exact steps to reproduce the issue – e.g. sequence of menu items accessed, modules selected, exact report names, etc.
- Any full view screen shots are always helpful!

Current Support System Users

All users currently using the Desk.com system have been setup and are ready to go in TeamSupport.
Please follow the instructions for *First Time Access* below
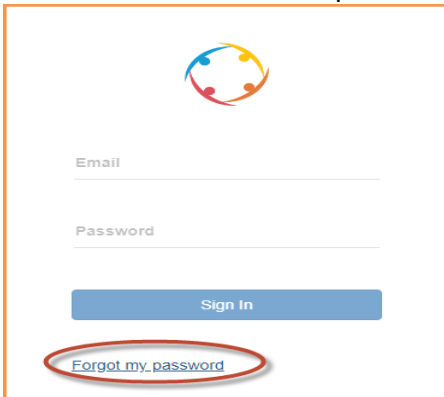
New Users

Prior to using TeamSupport, New Users must first be setup in the system.
Please contact the helpdesk via email or phone to request access for new users. The help desk team will notify new users once their account is created and ready for them to create a secure password.

First Time Access

All users will need to create a secure password prior to logging into the TeamSupport customer hub. This is a onetime setup step (unless you forget your password at a later date)

Select the "**Forgotten Password"** link to create a secure password and/or reset a password.
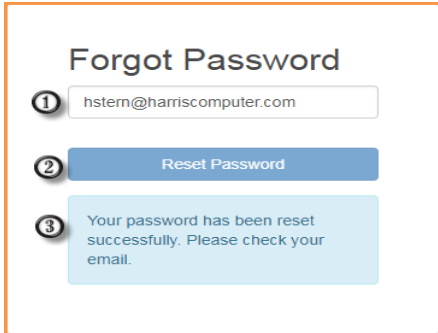
Resetting a Password:
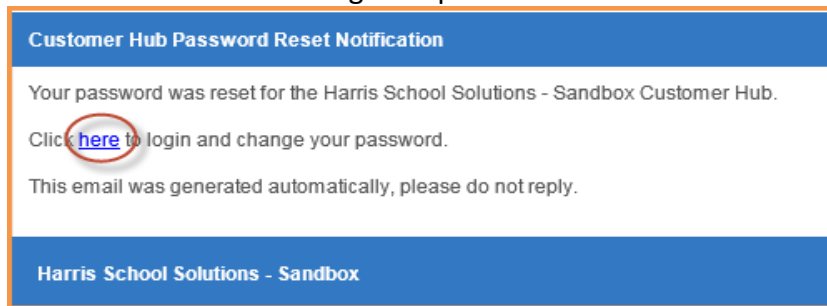
Select the **"Forgot Password"** link
Enter the email address you provided to the help desk team for your account (they must match)
Select the BLUE **"Reset Password"** button
A message will display indicating your password has been reset. Check email for instructions

Once you the user has received the email notification of the password reset request, simply click on the BLUE "Click Here" link to change the password
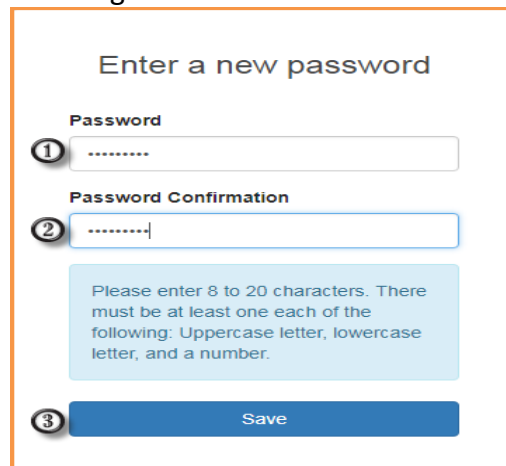
Customer Hub Password Reset Notification

Your password was reset for the Harris School Solutions - Sandbox Customer Hub.

Click here to login and change your password.

This email was generated automatically, please do not reply.

Harris School Solutions - Sandbox

Password Criteria:

- Passwords must be between 8-20 characters
- There must be at least one of the following:
  - Uppercase Letter
  - Lowercase Letter
  - Numeric Number

Enter a secure password in the **"Password"** field

Confirm the password in the **"Password Confirmation"** field

Save your new password by selecting the BLUE **"Save"** button

Enter a new password

Password

① ·········

Password Confirmation

② ·········

Please enter 8 to 20 characters. There must be at least one each of the following: Uppercase letter, lowercase letter, and a number.

③ Save

Existing User Login

Browse to https://cte.na2.teamsupport.com

Enter **"Username"** (this will be your email address)
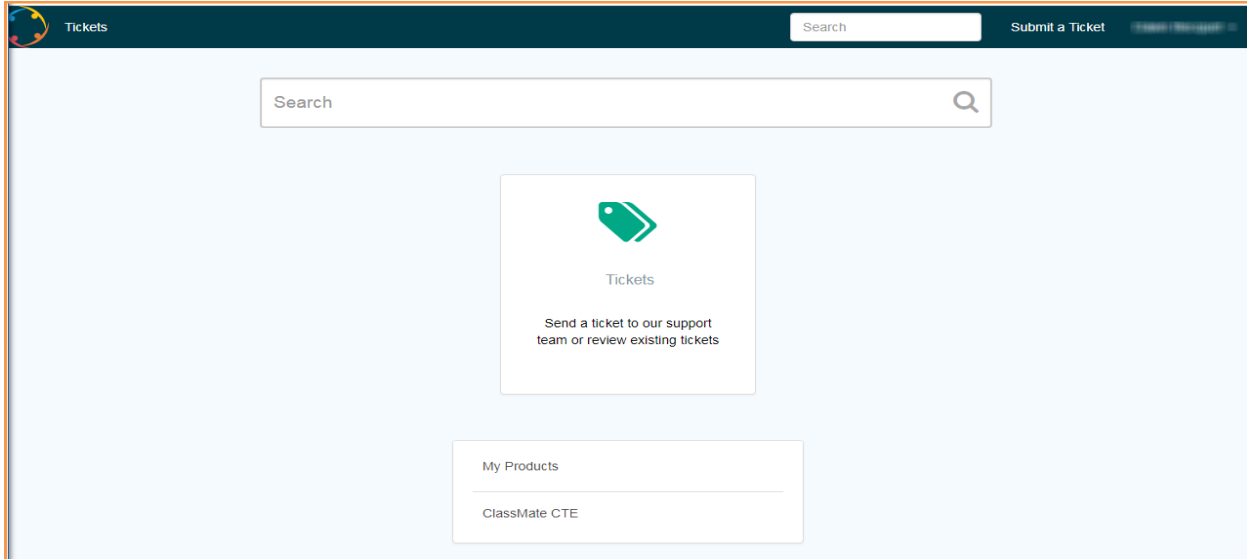
Enter "**Password"**

Select **"Sign In"**

Customer Dashboard

Once you have successfully logged into the Customer Hub, you will be able to:

- Open new tickets
- View your open/closed tickets
- View open/closed tickets for your organization
- Post Screen Recordings and Video Recordings to tickets right from TeamSupport

Creating a New Ticket

Select **"Submit a Ticket"** located on the right side along the top of the screen
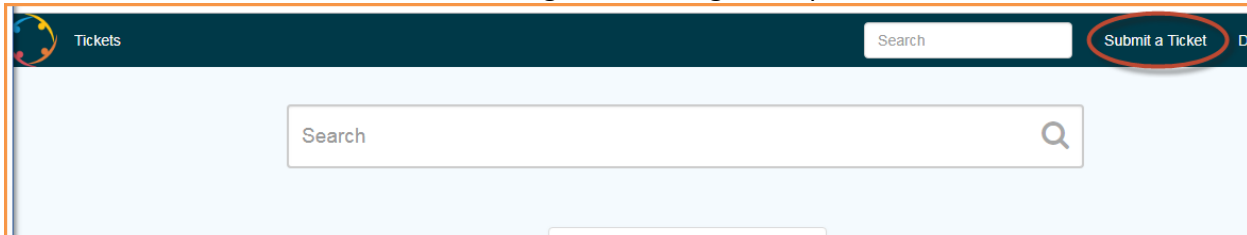
Populate the following fields and select BLUE **"Submit Ticket"**:

Title (Subject)	**Severity**
Ticket Type	**Product**
Description	**Drop or Upload files**
Record a Video	

Screen Recording from within the Ticket

TeamSupport offers users an easy way to record and attach screen recordings.
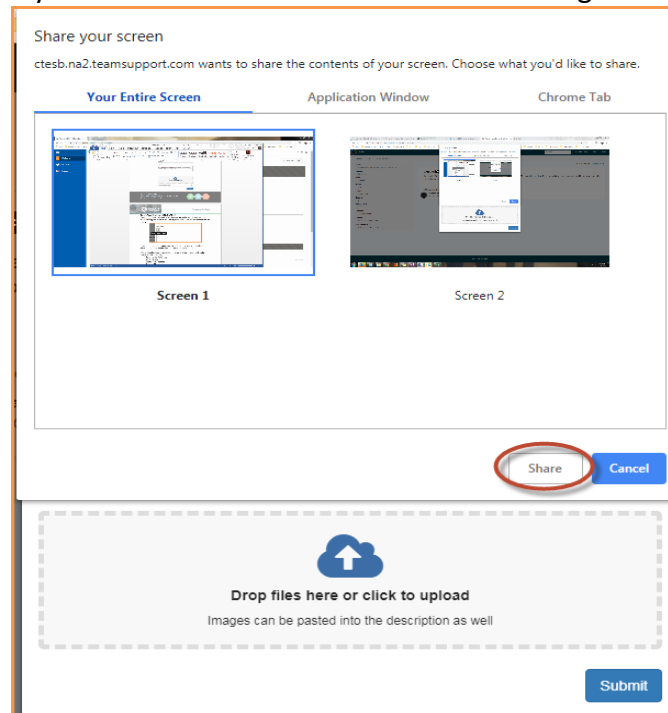While creating the ticket, in the **"Description"** field select the black dot within the square
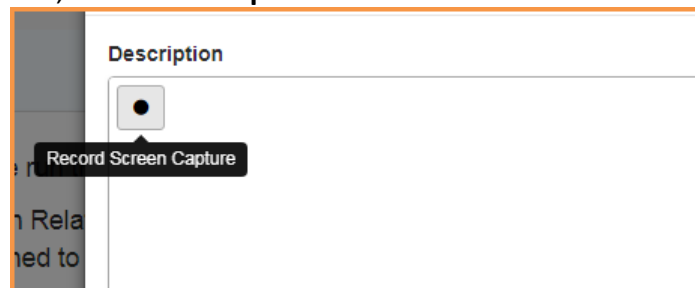
TeamSupport will request permission to share your screen. This may look different by user based on a number of factors including multiple monitors.

Select **"Share"** to share your selected screen and use the recording functionality

Select the BLUE video camera **"Record"** icon. Record the action you want to include in the ticket

As the system is recording a message will display indicating it is **"Currently Recording"** and will show the elapsed time

To stop recording, select the RED **"Stop Recoding"** icon


To attach the recording to the ticket by select the BLUE **"Stop Sharing"** button located on the bottom of your screen. This is a MANDATORY step to ensure the capture is attached to the case
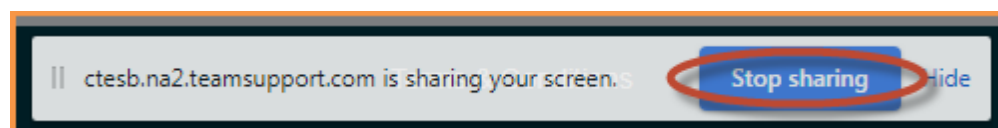
After screen sharing has been stopped, users can then attach the recording to the ticket by selecting the GREEN "Insert Screen Recording" icon
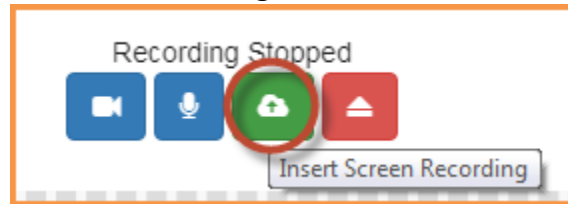
Once the recording is attached, users can view and play the recording from within the ticket! Don't forget to hit the BLUE "Submit" button.
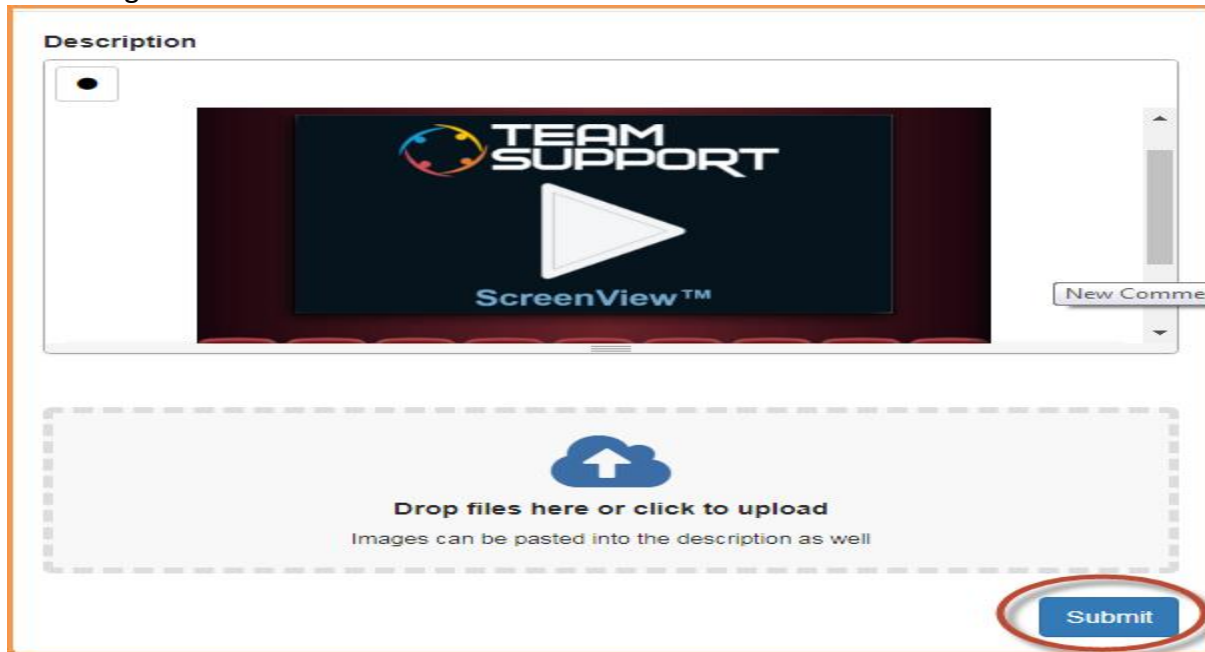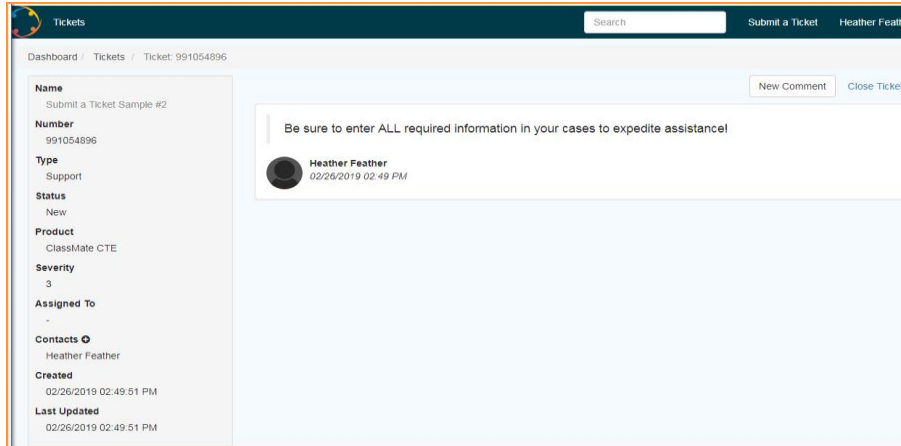

After a ticket has been successfully submitted, a ticket summary will display
From this view, users can:

- Return to the Dashboard
- See All Tickets
- Enter a New Comment
- Close the Ticket
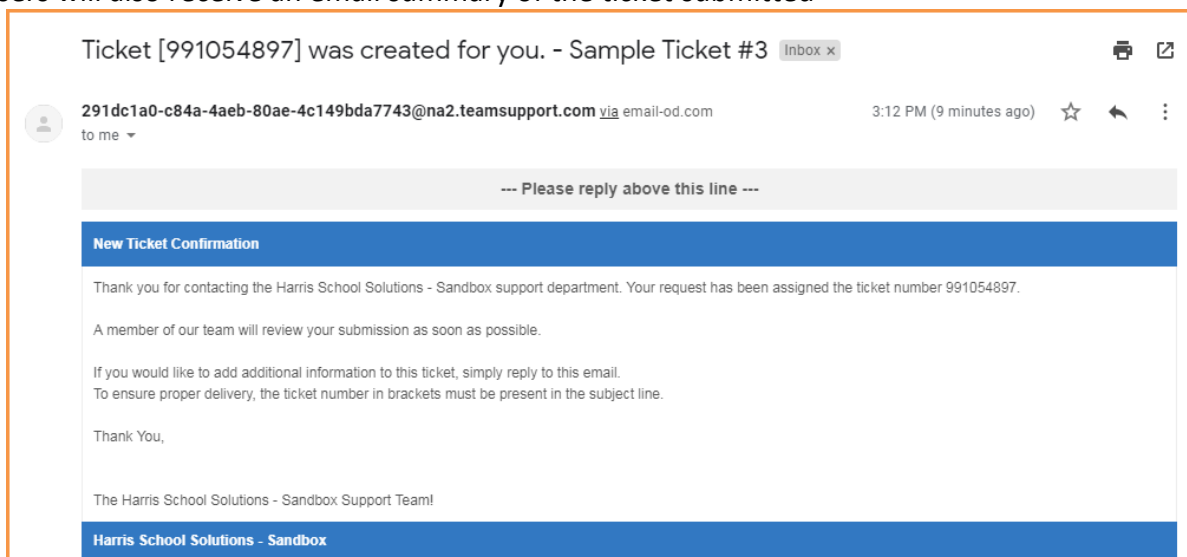
Users will also receive an email summary of the ticket submitted
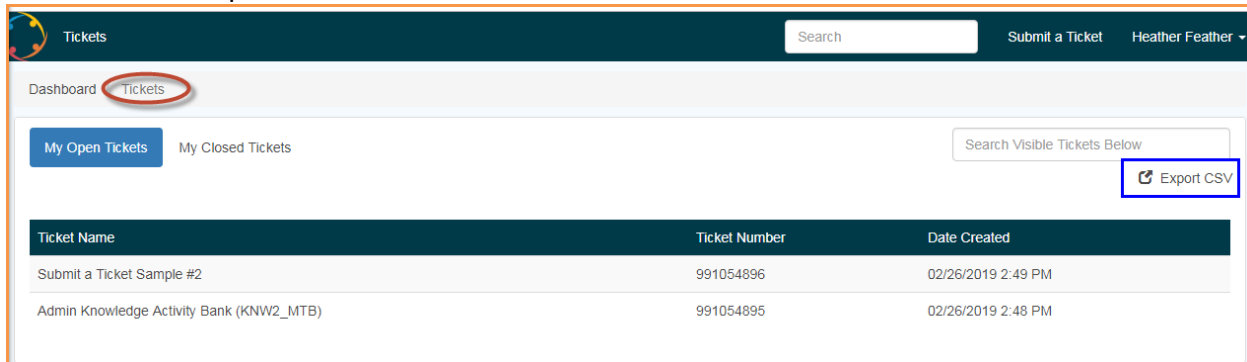

View All Tickets
Select the GREEN ticket located in the center of the dashboard or select the Tickets Tab after submitting a case to view all **Open** or **Closed** Tickets

Exporting
Users can also export tickets into a .CSV file

<u>Creating Tickets: Best Practices</u>

Our goal is to provide the best customer services we can in a timely and efficient manner. To assist us in helping you, the following items will allows us to better meet your needs. Every email we send to you asking for additional details delays the resolution of the ticket.

Required Information:

- **Contact Information:** Please confirm contact information, best contact method and times you can be reached
- **Application:** Indicate the application you are referencing
  ClassMate for CTE
  ClassMate for AE
  Portals:
  > CTE Parent Portal
  > CTE District Portal
  > CTE Student Portal
  > CTE Admin Dashboard
  > AE Student Portal
- **Access:** How are you accessing the product
  Published App
  LaunchPad
  Gateway
- **Operating System:** Please indicate the users OS. For example: MAC/PC/Android/iPad and version of the operating system
- **Browser:** Please provide the type of browser the user is working with when encountering the issue. For example, Chrome, Firefox, Internet Explorer, etc.
- **Location:** If you are a multi-location school, please indicate which location by name and location ID
- **Module Issues**: If you are experiencing an issue within a module you must provide the module name and module ID
- **Student Data Issues**: If you are having student data issues it is VITAL that you follow the security steps listed to ensure our student data privacy.
  o Only provide the ClassMate student ID and initials
  o Provide a description of the data issue
  o Do NOT send student confidential data via email to us
- **Report Issues**:
  o ClassMate or Custom Report (Custom reports are not maintained by our support team)
  o Report Category the report is found
  o Report Name and ID
  o Parameters used to run the report in question
- **State Reporting Templates:**
  o Template Name

- o Student Secure ID & ClassMate ID ONLY
- o Field Number
- o Location of the saved template so we can review
- o If in reference to an error message, the message MUST be attached for review
- **Performance Issues:**
  - o Single or Multiple users
  - o Time of Day
  - o Functions being performed
  - o Operating System
  - o Browser
- **User Specific Issues:**
  - o Username
  - o Employee Name
  - o Description of the Issue
  - o Location: school, home, etc.
- **Troubleshooting:** List any troubleshooting steps already taken and attached a recording of the issue whenever possible. If an error message is encountered, please attach a **FULL** screen shot and provide details of the steps leading to the message.
  It is vital that we know the steps taken so we can reproduce the issue.

ClassMate provides users with a variety of learning resources, including documentation and recorded webinars, please visit www.classmate.net to access these tools and be sure to check the Landing Page for events, news and educational webinar schedules.