

# **The Life Cycle of a Transport Support Request**

**Customer Support Tools & Procedures**

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# Discussion Items

- **Customer Support Procedures & Work Flow**
- **Customer Support Reporting Tools**
  - **Electronic Reporting Form (ERF)**
  - **Warranty Report Form**
- **Electronic Tracking Tools**
  - **Call Tracking Data Base**
  - **Transport Maintenance Request (TMR) Search**
  - **Customer Product & Platform Search**

# Customer Support Procedures

- **User encounters a problem**
- **Fills out an ERF or Warranty Report form**
- **Received by entire Customer Support Team**
- **Automatic acknowledgement is sent**
- **Call Ticket entered in tracking system**
- **1st level support specialist reviews report**
  - **Provides immediate solution (if possible)**
  - **May request more information (screen shots, data)**
  - **Does research & testing**

# Customer Support (Continued)

- **If unable to resolve, passes to 2nd level**
  - **Systems Services Team (Implementation staff)**
  - **More extensive review & testing**
  - **Work with user on finding work-arounds**
- **If no resolution, passes to 3rd level support**
  - **Development Team**
  - **Application experts do extensive investigation**
- **If not resolved, *then becomes a TMR***
  - **Error, Enhancement or Warranty Item**

# Meet 1<sup>st</sup> Level Support Specialists

- **PES/LAS/CAS – Ed McAvoy & Francesco Rizzi**
- **DSS/CES – Haval Aloussi & Ed McAvoy**
- **Estimator 2.0 – Dan Bernard & Haval Aloussi**
- **FieldManager – Matt Barreto & Dan Bernard**
- **Expedite – Dan Bernard & Matt Barreto**

# **Electronic Reporting Tools**

- **Cloverleaf Web Site - [www.cloverleaf.net](http://www.cloverleaf.net)**
  - **Most information open to the public**
  - **Three restricted areas**
    - **People**
    - **Presentations**
    - **Support**
  - **Access available to all member agencies**
    - **To request an account, send e-mail to Customer Support**

# Electronic Request Form (ERF)

- Available from the Cloverleaf home page:
  - Support -> ERF
  - **Content and criteria soon to be expanded**
  - Contains both general & required fields
  - User can designate critical date

# Warranty Report Form

- Available from the Cloverleaf home page:  
Support -> Warranty Report Form

Used to report problems found in first 120 days  
(or as modified by AASHTO)

- Allows attachments
- Automatically routed to Customer Support, TTF Chair & AASHTO Project Manager (Chuck Conley)

# Call Tracking System

- **Clientele Customer Support Application**
  - Available on Cloverleaf -> Support
  - View Call Ticket on-line
  - Check status of specific Call Ticket
  - Use “criteria” or “keyword” searches
  - Call Ticket only “Closed” when resolved or when it becomes a TMR

# **Transport Maintenance Request (TMR System)**

- **Major Overhaul**

- The TMR database is undergoing a major revision to handle multiple modules per TMR.

- **Obsolete TMR Project**

- Each reporting agency reviewing all open TMRs in an effort to remove obsolete items.

- **TMR Search Form**

- Available on Cloverleaf -> Support
- All reporting agencies are now displayed

# **Customer Product & Platform Search**

- **New feature in Clientele will track the platform and release details for each product and agency licenses.**
- **Users will be able to search the database based on:**
  - Agency**
  - Product**
  - Database Management System**
  - Application Server Operating System**
  - Database Server Operating System**
  - Client Operating System**

# Priority Designation

- **Urgent - Agency is out of business**
  - Production system (not test area)
  - Can't pay a contractor
  - Can't do a bid letting
- **Critical - Agency can't get into production**
  - Unable to complete implementation process
  - Critical date given by reporting agency
- **High - Important; major inconvenience**
- **Medium - A definite issue; does not stop business; can work-around**
- **Low - Nuisance to business procedures; can work-around**

# **Cloverleaf Links of Interest**

- **Task Force Meetings**
- **Agency Status Report**
- **Implementation Status Report**
  
- **System Architecture**
- **Product Updates**
  
- **Pre-Ballot**