

Planview Customer Community Guide

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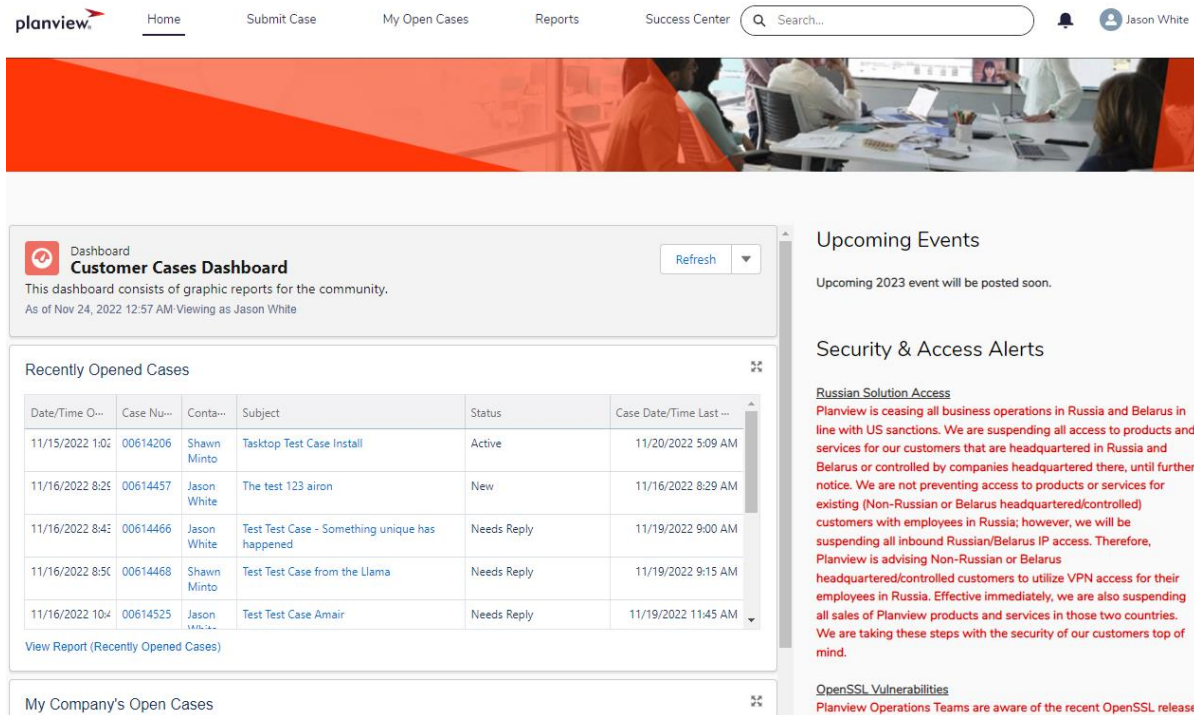
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Service Cloud Community Overview

The Customer Care Portal URL is: <https://support.planview.com/>



The screenshot shows the Planview Customer Cases Dashboard. The top navigation bar includes links for Home, Submit Case, My Open Cases, Reports, and Success Center, along with a search bar and a user profile for Jason White. The main content area is divided into two columns. The left column contains a 'Customer Cases Dashboard' section with a 'Refresh' button and a table of 'Recently Opened Cases'. The right column contains 'Upcoming Events' and 'Security & Access Alerts' sections.

Customer Cases Dashboard

This dashboard consists of graphic reports for the community.
As of Nov 24, 2022 12:57 AM Viewing as Jason White

Recently Opened Cases

Date/Time Opened	Case Number	Contact	Subject	Status	Case Date/Time Last Updated
11/15/2022 1:00	00614206	Shawn Minto	Tasktop Test Case Install	Active	11/20/2022 5:09 AM
11/16/2022 8:25	00614457	Jason White	The test 123 airon	New	11/16/2022 8:29 AM
11/16/2022 8:45	00614466	Jason White	Test Test Case - Something unique has happened	Needs Reply	11/19/2022 9:00 AM
11/16/2022 8:50	00614468	Shawn Minto	Test Test Case from the Llama	Needs Reply	11/19/2022 9:15 AM
11/16/2022 10:4	00614525	Jason White	Test Test Case Amair	Needs Reply	11/19/2022 11:45 AM

[View Report \(Recently Opened Cases\)](#)

My Company's Open Cases

Upcoming Events

Upcoming 2023 event will be posted soon.

Security & Access Alerts

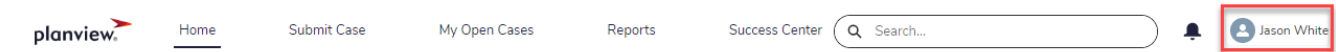
Russian Solution Access
Planview is ceasing all business operations in Russia and Belarus in line with US sanctions. We are suspending all access to products and services for our customers that are headquartered in Russia and Belarus or controlled by companies headquartered there, until further notice. We are not preventing access to products or services for existing (Non-Russian or Belarus headquartered/controlled) customers with employees in Russia; however, we will be suspending all inbound Russian/Belarus IP access. Therefore, Planview is advising Non-Russian or Belarus headquartered/controlled customers to utilize VPN access for their employees in Russia. Effective immediately, we are also suspending all sales of Planview products and services in those two countries. We are taking these steps with the security of our customers top of mind.

OpenSSL Vulnerabilities
Planview Operations Teams are aware of the recent OpenSSL release

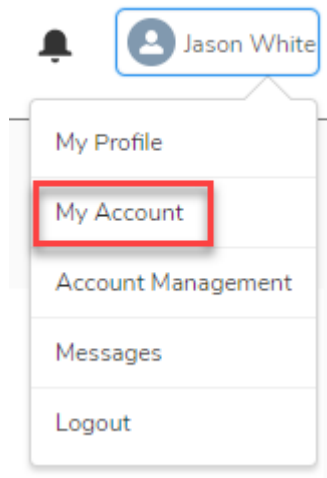
1. **Home** - Click on the graphs and tables displayed in the Home dashboard to see cases specific to your account. You can see all your company's cases in one location.
2. **Submit Case** - Click Submit Case to create a new case. A wizard-like process will be used to determine where your case should be routed.
3. **Success Center** - Click Success Center for easy access to the Customer Success Center - <https://success.planview.com>
4. **Service Release – Enterprise One** - Click this option to see current service releases for the E1 product line.
5. **US/EU FTP** - The US FTP or EU FTP options are available under **More** and provide access to the FTP sites if your company has any.

Add Contacts

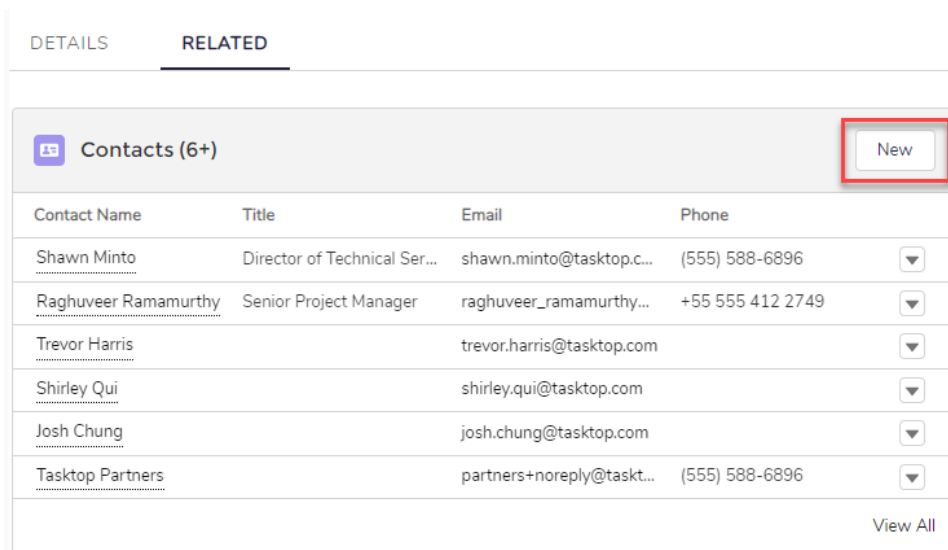
Community gives our customers the ability to maintain their own contacts. Your default profile in Community is that of an administrator, allowing you to add contacts and enable existing contacts.



1. Click on your **username** at the top right to open the option list.



2. Click on **My Account** to open your account page.



3. The account layout page allows you to see contacts under Related and information about your account under Details. Click **New** on the Contacts section to add a new contact.

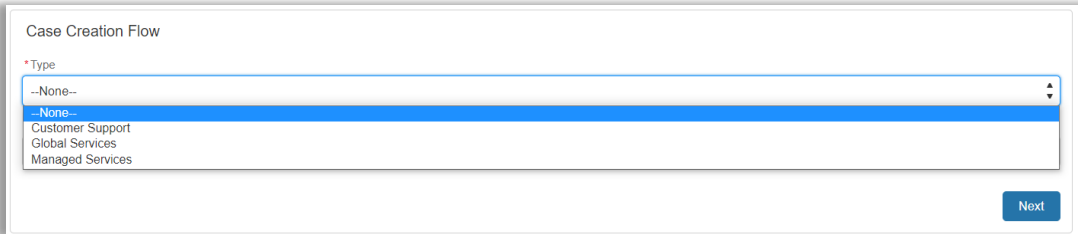
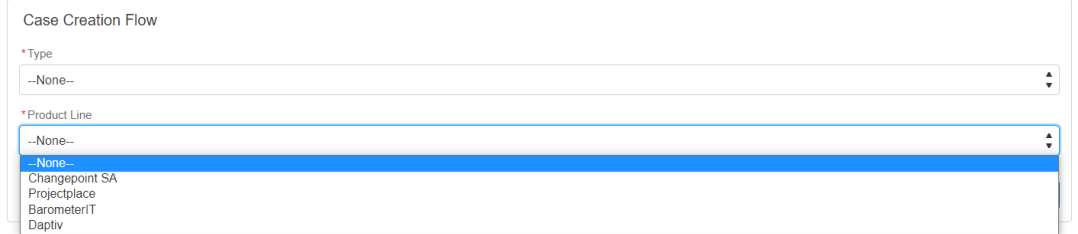
- ## Submit Cases

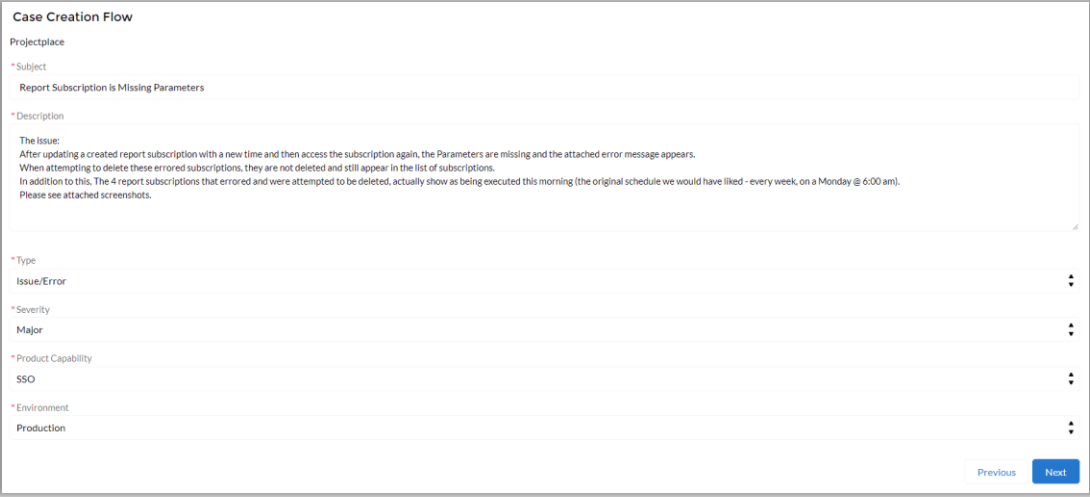
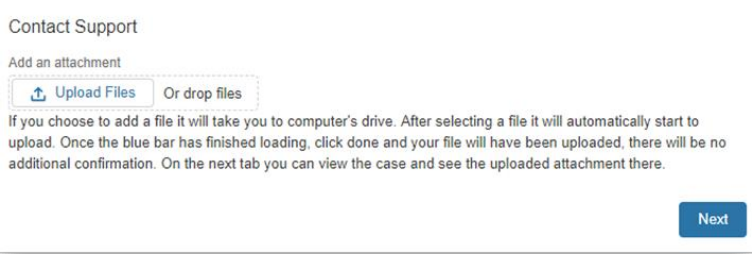
The Product Line values available for selection will depend on the active contracts and products your Organization has purchased. Please note that you will see one product line per *instance* owned. This means you might see duplicate values when selecting

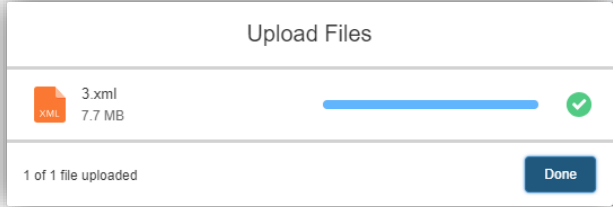
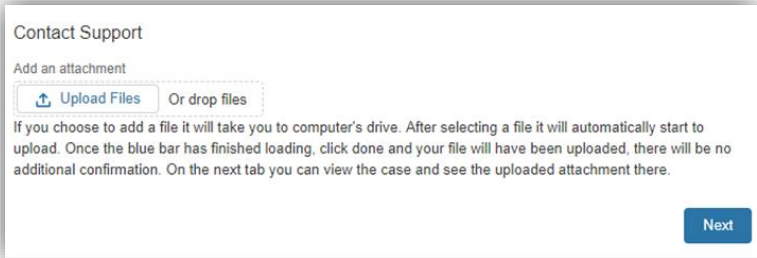
Product Line. To assist in identifying which instance the issue is related to, we've appended to the Product Line name your instance sub-domain name. For example, if your Organization owns 2 LeanKit instances, you will see the following as options on the Product Line drop-down:

- LeanKit (instance name A)
- LeanKit (instance name B)

Case Submission Process

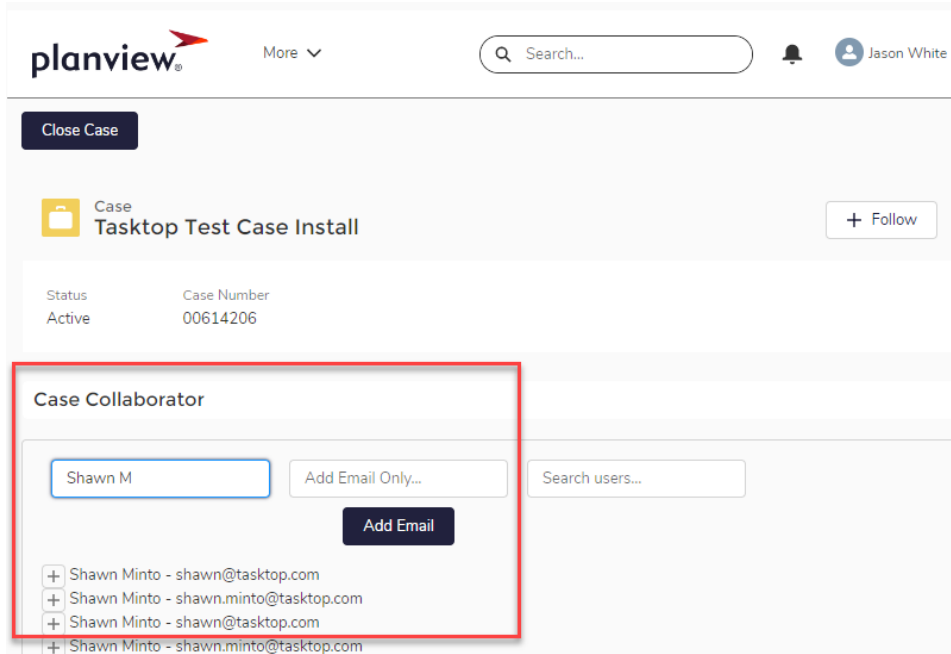
Description	Screenshot
<p>Select the Type of Request you will be submitting.</p> <ul style="list-style-type: none"> • Customer Support- issues with tool, report a bug, functionality questions, etc. • Global Services – billable engagements for Reporting or Integrations. • Managed Services – for use only if your organization has purchased managed services for administration. 	
<p>Product Lines owned by your Organization will display in the drop-down appended by the name of the instance in parenthesis if its available.</p>	

Description	Screenshot
<p>Please populate the required fields and provide as much information as possible.</p> <p>The Type of issue and Product Line selected drive the fields that will appear for input, including the product capability options.</p> <p>Select Next to upload attachments.</p>	
<p>If there are any files or screenshots that should be attached to the case, you can upload them or drag and drop the files during this step.</p> <p>Providing full page screenshots will help our consultants more quickly resolve your issues.</p>	

Description	Screenshot
<p>Once the file upload is complete the Done button will become active.</p> <p>Click Done and then Next</p> <p>Note: you will not see file names in the screen for confirmation of upload. Select NEXT and the created case with attachments will be viewable.</p>	 

Case Collaborators | Additional Contacts

Once a case has been created using the Submit Case process, case collaborators can be added to each case. At the bottom left of the Case Layout you'll see the Case Collaborators section. You can add contacts already associated with your account or you can add the email addresses of individuals you'd like copied on the account but who are not contacts.



planview® More ▾ Search...

Close Case

Case Tasktop Test Case Install + Follow

Status	Case Number
Active	00614206

Case Collaborator

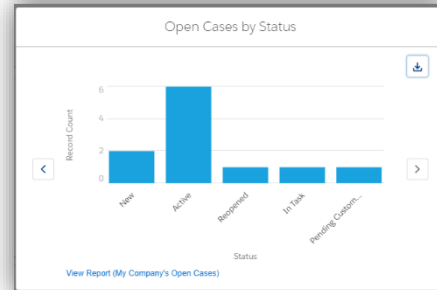
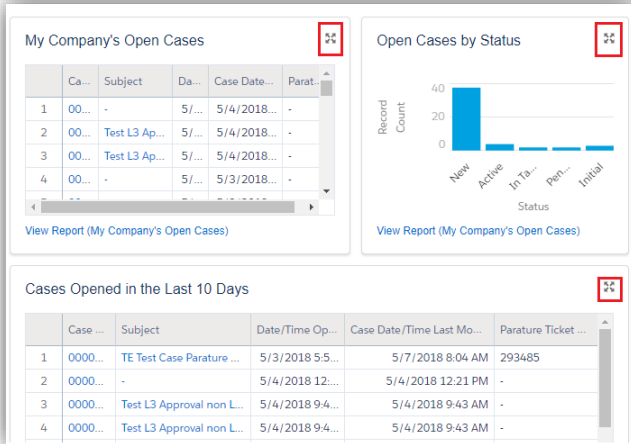
Shawn M Add Email Only... Search users...

Add Email

- + Shawn Minto - shawn@tasktop.com
- + Shawn Minto - shawn.minto@tasktop.com
- + Shawn Minto - shawn@tasktop.com
- + Shawn Minto - shawn.minto@tasktop.com

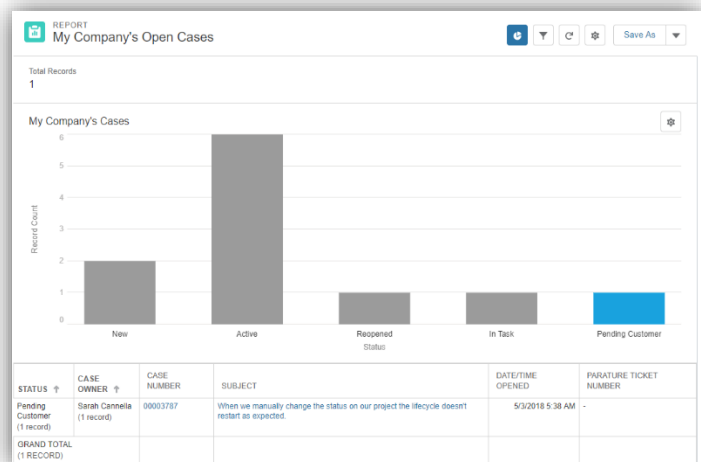
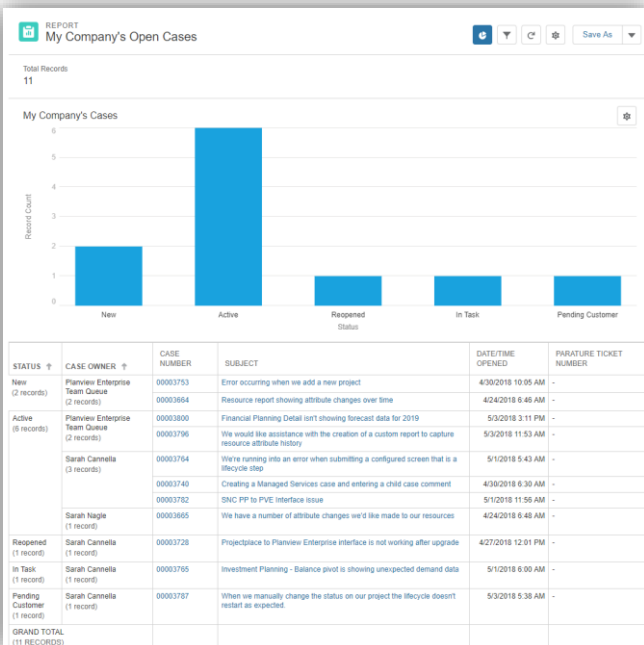
Case Dashboards and Reports

Dashboards



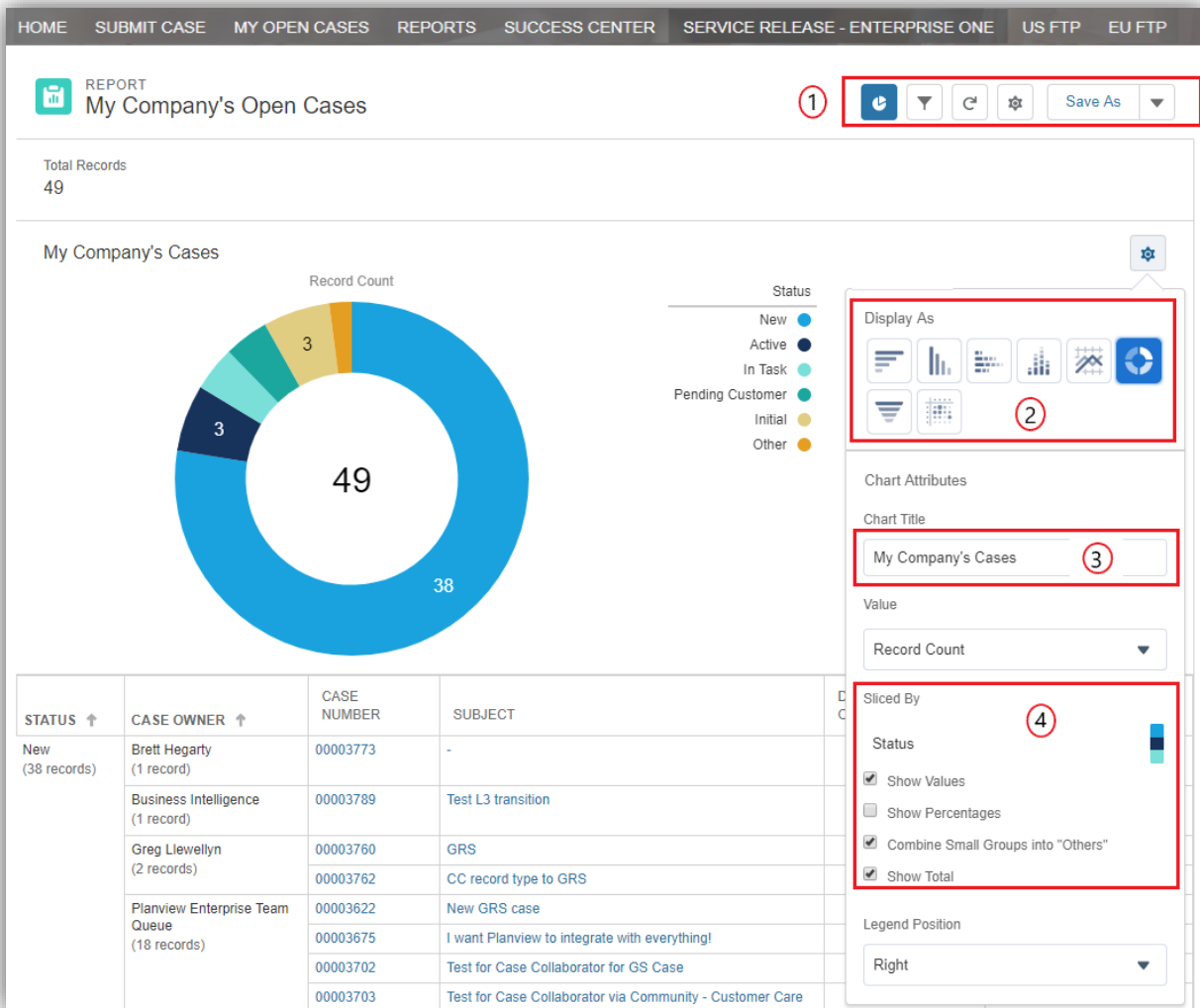
There are several ways to access your cases from Community. On the Home tab, you can click on the Expand icon from any section of the dashboard to see a larger image of the different sections.

Clicking on **Open Cases by Status** results in an enlarged image of that section. Each of the bars in the chart can also be clicked to limit the list of related cases to the selected status. Clicking again takes you back to the original report.



Clicking on the case number or subject in the case list allows you to open a specific case. Once you are viewing the Case Layout you can perform various actions on the case.

Reports



Case reports have several configuration options available as shown in the screenshot above and listed below:

1. You can **Toggle** the display of the chart, **Filter** by various fields like record type and status, **Refresh** the data in the report, **Show** the different report sub-sections and **Export** the data.
2. You can control the type of chart that displays by changing the **Display As** setting.

Depending on the type of chart you've selected you can then modify related settings. In the donut chart example above

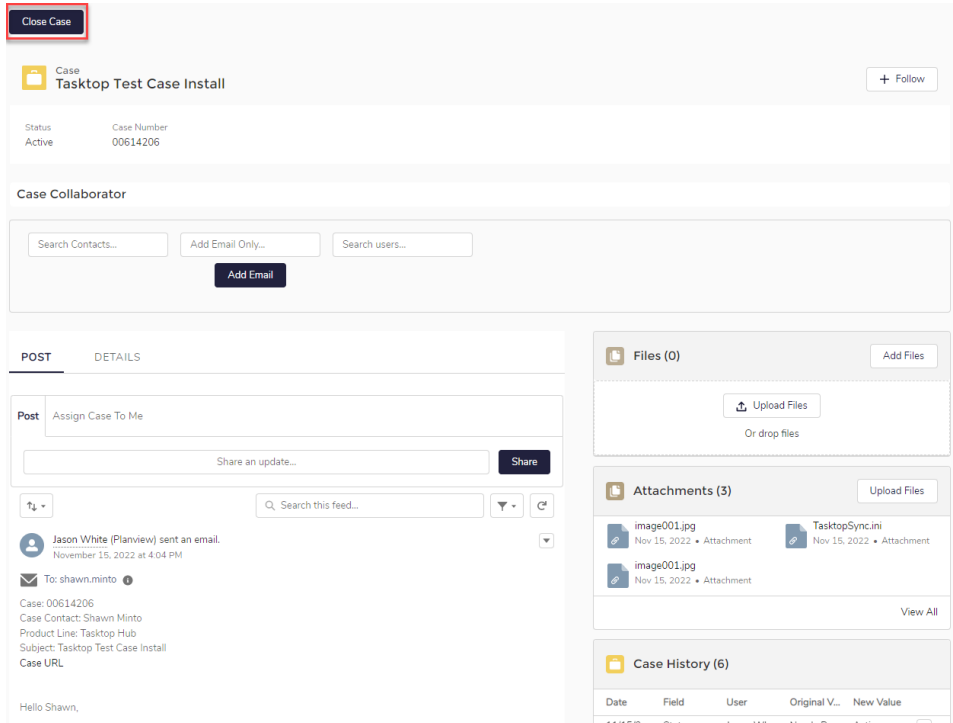
1. You can modify the **Chart Title** in the Chart Attributes section.
2. You can modify the counts that display on the chart by changing the options in the **Sliced By** section.

Case Actions

You can open the Case Layout for a specific case by drilling down on a dashboard, a report or by searching for a case.

Once on the Case Layout, the following options and actions are available depending on the current state of the case:

- The **Close Case** button allows you to close an open case.



Close Case

Case
Tasktop Test Case Install

Status: Active Case Number: 00614206

Case Collaborator

Search Contacts... Add Email Only... Search users...
Add Email

POST DETAILS

Post Assign Case To Me

Share an update... Share

Jason White (Planview) sent an email.
November 15, 2022 at 4:04 PM

To: shawn.minto
Case: 00614206
Case Contact: Shawn Minto
Product Line: Tasktop Hub
Subject: Tasktop Test Case Install
Case URL

Hello Shawn,

Files (0) Add Files
Upload Files
Or drop files

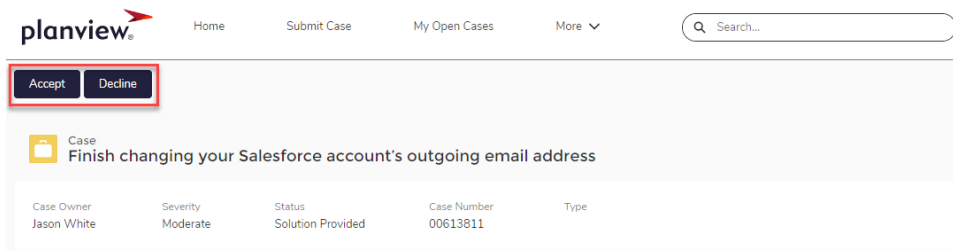
Attachments (3) Upload Files

image001.jpg Nov 15, 2022 • Attachment
TasktopSync.ini Nov 15, 2022 • Attachment
image001.jpg Nov 15, 2022 • Attachment
View All

Case History (6)

Date	Field	User	Original V...	New Value
11/15/22	Case	Jason White	00614206	00614206

- The **Re-Open Case** button allows you to re-open a closed case.
- **Details** allows you to see the information included when the case was originally submitted. If you'd like to change any of the information on the case, please post a comment requesting the change. A case can't be edited by a customer once it has been submitted. The Details section will also include the Close Case Notes, a summary of the case resolution, if the case has been closed.
- The **Accept** and **Decline** buttons allow you to accept or decline a case that's been set to the status Solution Provided. If you agree with the provided resolution, click Accept. If you disagree with the solution that has been provided, click Decline and please post a comment explaining why you disagree that the case is resolved. The status of the case will be set to Reopened.



planview

Home Submit Case My Open Cases More

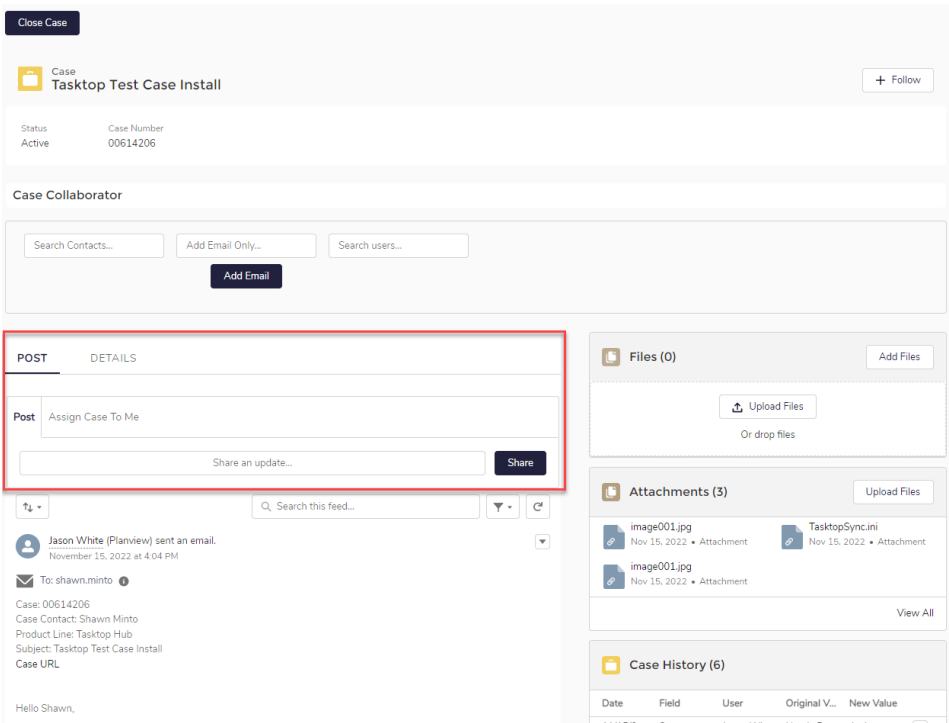
Search...

Accept Decline

Case
Finish changing your Salesforce account's outgoing email address

Case Owner	Severity	Status	Case Number	Type
Jason White	Moderate	Solution Provided	00613811	

- **Post** a comment on the case to send an update or answer a question.



Close Case

Case
Tasktop Test Case Install + Follow

Status: Active Case Number: 00614206

Case Collaborator

Search Contacts... Add Email Only... Search users... **Add Email**

POST DETAILS

Post Assign Case To Me

Share an update... **Share**

Jason White (Planview) sent an email.
November 15, 2022 at 4:04 PM

To: shawn.minto
Case: 00614206
Case Contact: Shawn Minto
Product Line: Tasktop Hub
Subject: Tasktop Test Case Install
Case URL

Hello Shawn,

Files (0) Add Files

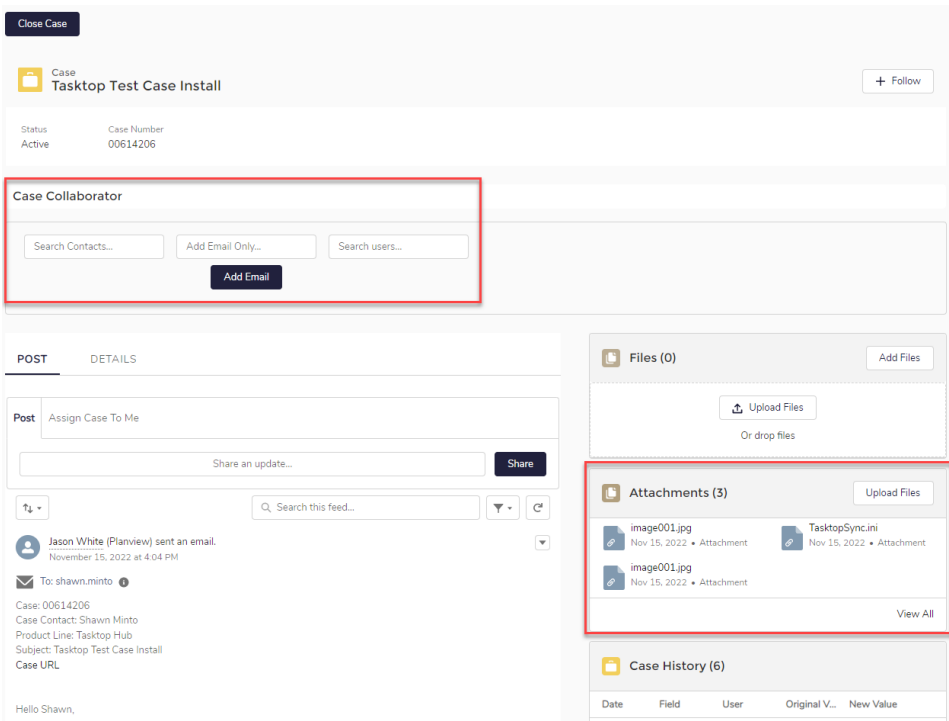
Attachments (3) Upload Files

image001.jpg Nov 15, 2022 • Attachment TasktopSync.ini Nov 15, 2022 • Attachment
image001.jpg Nov 15, 2022 • Attachment

Case History (6)

Date	Field	User	Original V...	New Value
11/15/22	Status	Jason White	Resolved	Active

- Drag and drop files to the **Attachments** section to provide additional information on the case.
- Add **Case Collaborator** allowing additional contacts to view the correspondence on the case.



Close Case

Case
Tasktop Test Case Install + Follow

Status: Active Case Number: 00614206

Case Collaborator

Search Contacts... Add Email Only... Search users... **Add Email**

POST DETAILS

Post Assign Case To Me

Share an update... **Share**

Jason White (Planview) sent an email.
November 15, 2022 at 4:04 PM

To: shawn.minto
Case: 00614206
Case Contact: Shawn Minto
Product Line: Tasktop Hub
Subject: Tasktop Test Case Install
Case URL

Hello Shawn,

Files (0) Add Files

Attachments (3) Upload Files

image001.jpg Nov 15, 2022 • Attachment TasktopSync.ini Nov 15, 2022 • Attachment
image001.jpg Nov 15, 2022 • Attachment

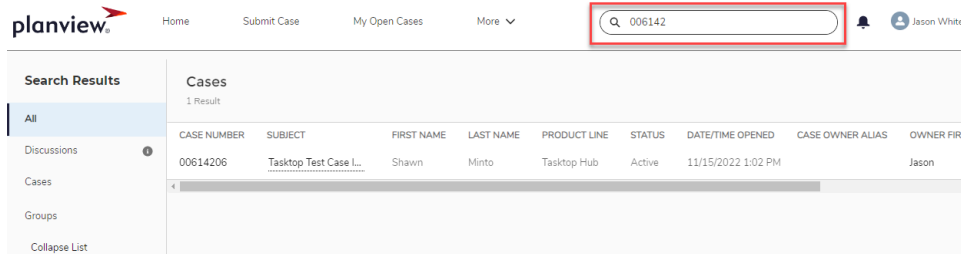
Case History (6)

Date	Field	User	Original V...	New Value
11/15/22	Status	Jason White	Resolved	Active

Search

When searching in Community, you can search by case number, legacy ticket number or simply a word referenced in a case. Search results are based on all records and files that a community member can access.

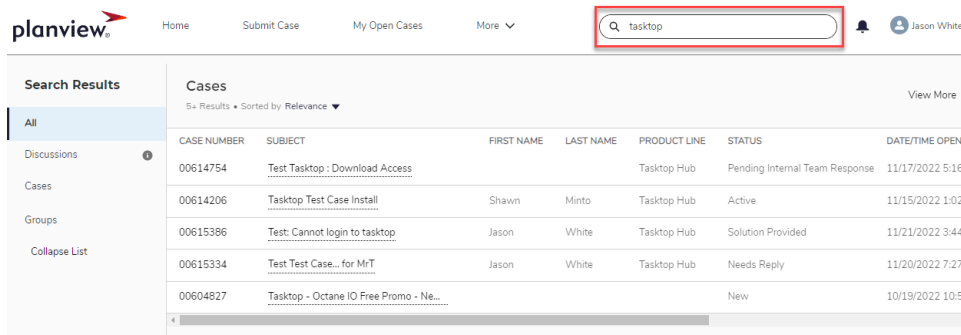
Search by case number



The screenshot shows the Planview search interface. The search bar at the top right contains the text "006142". Below the search bar, the "Search Results" section shows "1 Result". The results table has the following data:

CASE NUMBER	SUBJECT	FIRST NAME	LAST NAME	PRODUCT LINE	STATUS	DATE/TIME OPENED	CASE OWNER ALIAS	OWNER FIRS
00614206	Tasktop Test Case L...	Shawn	Minto	Tasktop Hub	Active	11/15/2022 1:02 PM		Jason

Search by a word in cases



The screenshot shows the Planview search interface. The search bar at the top right contains the text "tasktop". Below the search bar, the "Search Results" section shows "5+ Results • Sorted by: Relevance". The results table has the following data:

CASE NUMBER	SUBJECT	FIRST NAME	LAST NAME	PRODUCT LINE	STATUS	DATE/TIME OPENED
00614754	Test Tasktop: Download Access			Tasktop Hub	Pending Internal Team Response	11/17/2022 5:16
00614206	Tasktop Test Case Install	Shawn	Minto	Tasktop Hub	Active	11/15/2022 1:02
00615386	Test: Cannot login to tasktop	Jason	White	Tasktop Hub	Solution Provided	11/21/2022 3:44
00615334	Test Test Case... for MiT	Jason	White	Tasktop Hub	Needs Reply	11/20/2022 7:27
00604827	Tasktop - Octane IO Free Promo - Ne...				New	10/19/2022 10:55

Search by external (old ticketing system) ticket number



The screenshot shows the Planview search interface. The search bar at the top right contains the text "115670".

Contact Us

Please go to our [Description of Support Services](#) appendix 1 to see our communication matrix.