Netcompany

DMS Onboarding – Customer Portal Guide

DMS Onboarding
UFST/TOLDST

Version	1.0
Status	05 - Approved

Document history

Version	Dato	Forfatter	Status	Bemærkninger
0.1	17-07-2024	JOFB	DRAFT	Login, CP overview, Case creation, status, flow, and new user invites documented.
0.2	19-07-2024	JOFB	DRAFT	Made corrections and added example case creation subsection.
0.3	23-07-2024	JOFB	DRAFT	Addressed the comments made after second review. Added section about the service types
0.4	05-08-2024	JOFB	DRAFT	Addressed comments made by third review. Updated the colours on the flowchart.
1.0	05-08-2024	CNL	FINAL	

Table of Contents

1 Introduction

This guide is intended for users of the Customer Portal. It will detail the structure of the site, how to create and update cases and how to invite additional users of the same organization.

The decision to migrate to the Customer Portal is made with the following in mind:

- **Easy user interface:** Customer Portal is designed with the user experience in mind. It is a simpler and more intuitive application to use.
- **Improved cooperation:** The new Customer Portal allows for multiple users to be connected as an organization, enabling access to see and administer cases by other members of the organization.
- **Optimized login:** The Customer Portal will be accessible through the Microsoft account of the user instead of the requirement of separate email and password. This will also alleviate the problem of people not being able to enter Toolkit. A solution is being worked on to allow users who do not have a Microsoft account.

1.1 Log in

The Customer Portal functions by using the Microsoft Azure[1] credentials of the user to log in.

Go to the following URL: https://customerportal.netcompany.com to log in.

If you are met by the message "It looks like you do not have access to view anything on this site." when you try to use the link above, it is most likely because you have not been granted a user in the Customer Portal yet. As part of the onboarding process, the first step is to apply for DMS. This can be done here. Once you have submitted an application-form, a case will be created for the Onboarding Team to create a user in the Customer Portal for you. Be advised that only System-to-system users and software vendors will be granted access to the Customer Portal.

2 Overview

This section provides a summary of the new Customer Portal. It covers the content of the sections of the portal as well as the elements of particular importance to the users ability to create, update, and read cases.

The Customer Portal consists of two views: The homepage and the document library. Each view is further described in the following subsections.

2.1.1 Home

The homepage consists of two elements: The navigation menu to the left, and the case overview occupying the centre and right of the screen.

[1] In case of any issues with Microsoft Azure support can be reached on one of the channels listed here.

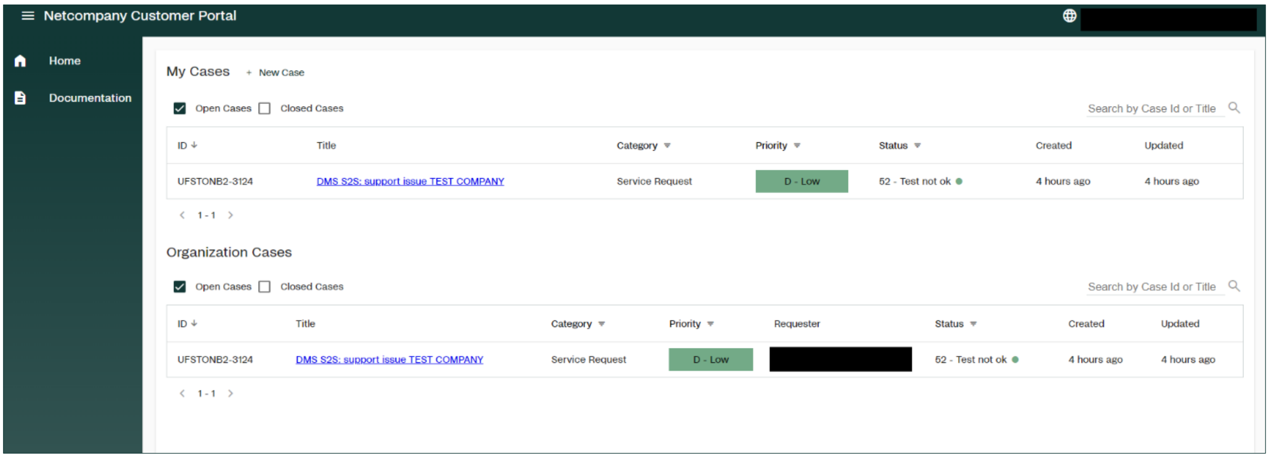


Figure 2-1 The home page of the Customer Portal

The navigation menu on the left-hand side, contains links to the homepage, “Home”, and the document library, “Documentation”.

The case overview consists of both the cases made by the user themselves, “My Cases”, as well as the cases submitted by other members of their organization, “Organization Cases”.

The overview displays all the relevant aspects of the case: The ID, title, status, as well as creation date and when the case was last updated. In “Organization Cases”, one can furthermore see the requester of the case.

By default, only the active cases are shown. Should one wish to see closed cases, simply check the box labelled “Closed Cases” under “My Cases” or “Organization Cases”.

Both “My Cases” and “Organization Cases” have a search function. This can be used to locate the case based on either the case ID or the title. To perform a search, write the title or the entire ID (e.g. UFSTONB2-3144) and wait for the search to show all results matching the input. No need to press any key to initialise the search. A drop-down menu will appear below the search bar, from where you can select the relevant case.

2.1.2 Documentation

The document library, called “Documentation” contains information related to support.

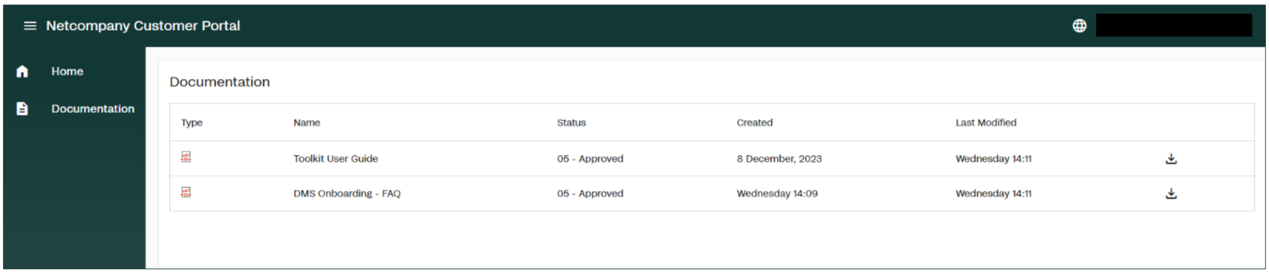


Figure 2-2 The Documentation section of the Customer Portal

Here you can find the Frequently Asked Questions (FAQ) as well as user guides for using the support tools provided by Onboarding Team. This section is a living library and documentation will be added, updated, and marked as deprecated as the need evolves. It is not possible to generate a preview of the documentation. Instead, it must be downloaded. This can be done by clicking the download icon to the right of the relevant document. It is also possible to see when the document was created as well as the date of last modification.

This will not supersede the main repository of documentation, which will remain the GitHub.

3 Cases

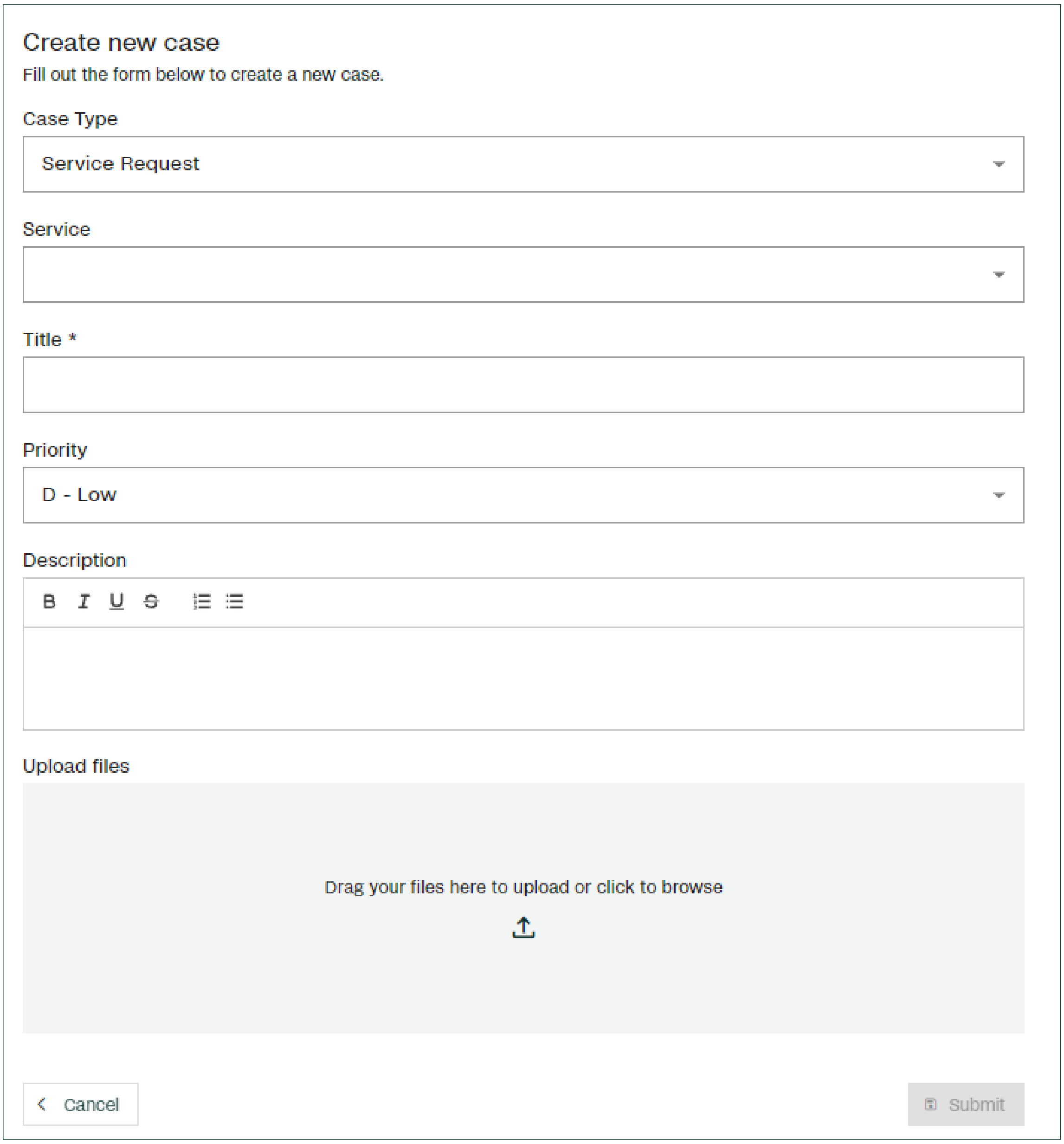
This section is a guide on how to create and update cases. This section will also explain the meaning of the case status and the flow of case handling.

3.1 Case Interactions

This section will describe the steps needed to create and update a case.

3.1.1 Creating new cases

To create a new case, navigate to the home page. Next to "My Cases" click the button labelled "+ New Case". This will take you to the case creation page.



The case creation process consists of filling out the relevant fields in the case form.

- **Service:** This is a drop-down list containing all the types of cases that can be made. The different Service Types are briefly explained in section 3.1.1.1. The choice of service determines the information expected from the user to enable the support team to provide fast and precise help.
- **Title:** This will be determined by the Service. In general, the title will be DMS S2S: {type of service} [insert company name]. It is recommended that the last part is replaced by the actual name of the company.
- **Description:** Depending on the type of Service requested, the description will be filled out with a list of items that needs to be described. This could include, CVR number, SE number, LRN/MRN of the declaration that produces the issue, timestamp of occurrence, Environment (UFT/TFE), customs domain (Import, Export, Transit), the error message received, and steps to reproduce the issue. Not all these fields will be present in every service type, but no matter which case, the description should be filled out as thoroughly as possible.

While not required, there is an option to upload files to the case. This could, for instance, be the xml that produces the error, or screenshots showing the process.

Once every field is filled out as detailed as possible, the case can be submitted by pressing the submit button at the bottom of the form.

See 3.1.1.2 for an example of a correctly filled out Case.

3.1.1.1 Service Types

The following section will give a short run-down of the different Service Types found on the Customer Portal.

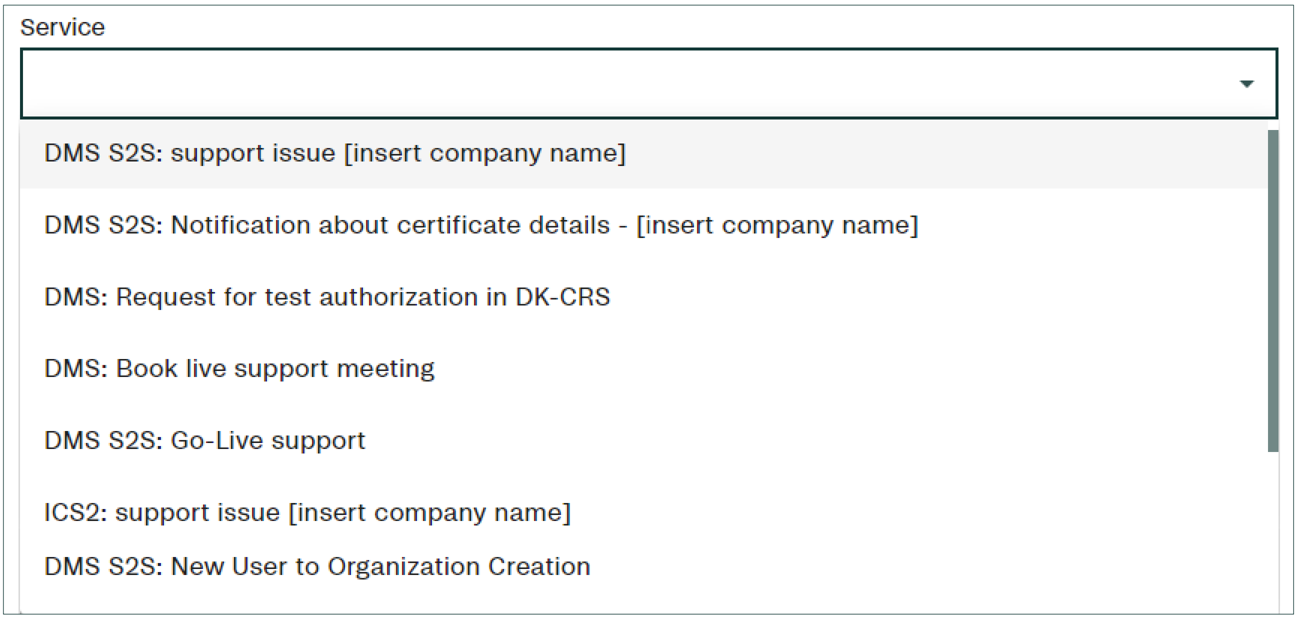


Figure 3-1 Drop down menu showing the different Services available

- **DMS S2S: support issue:** This is for general support issues. Any problem concerning DMS, that does not fit into one of the other categories below, should be a support issue, using this service type.
- **DMS S2S: Notification about certificate details:** This case is for creating roles and rights in TastSelv Erhverv DEMO for access to UFE/TFE. This is not possible to do for a company and the Onboarding Team has to do that on behalf of the requestee.
- **DMS: Request for test authorization in DK-CRS:** This service type is a request for an authorization on the test environment (TFE). There are no requirements on the part of the company to already qualify for the authorization to be granted one on TFE, but this will not translate to the production environment (PROD) where the company has to apply through proper channels.

- **DMS: Book live support meeting:** In situations where a live support session is necessary, this case should be used. As part of the case creation, the user must pick a time and date for the meeting. The Onboarding Team will then review the availability of the time and date and send confirmation if the time is available. The meeting will, as a rule, be between 45 minutes to an hour and will be held over Microsoft Teams.
- **DMS S2S: Go-Live support:** Once a company is done testing and wants to start using the production environment, a Go-Live case can be made. This will consist of a 1-hour support meeting where a supporter will be available to answer questions related to going live, as well as guiding and advising as much as necessary. This case also has the option for the supporter to merely be on stand-by, joining over Teams if requested during the go-live process.
- **ICS2: support issue:** This case is for support issues related to ICS2.
- **DMS S2S: New User to Organization Creation:** This case is for adding new users to your organization. This will be discussed in section 4.

3.1.1.2 Example case creation

In this section we present an example of a correctly filled out case. The bold text indicates the requested information, the italic text is a help text and the text with no formatting is the information provided by the user.

In the example below, a test user with CVR 12345678 has chosen a general support issue case issue due to his declaration being rejected. He has filled out the LRN for the declaration as TestLRN2024 and has noted the timestamp. The environment of the occurrence is TFE, and the domain is Transit, which is filled in. Since this is Transit, the Office of departure/destination are DK005600 and DK003862, respectively, which is duly written down.

CVR/SE number
Please write your CVR and/or SE number here.
12345678

LRN/MRN
Write the LRN or MRN of the declaration in question.
TestLRN2024

Timestamp of recent occurrence
Please note the time and date of the occurrence.
14:04 CEST 15-06-2024

Environment(UFE/TFE only.)
For PROD issues please contact TOLDST ServiceDesk.
TFE

Customs domain (Import, Export, Transit)
Write in which domain this happened.
Transit

Office of departure/destination
For Transit, please write the Office of departure/destination. Make sure it follows the DKn6 format e.g. DK004700.
DK005600 / DK003862

In this particular case, the test user gets a rejection error due to having filled out an invalid number in the security element (11 07 001 000), but they are unaware of this issue. They fill out the remaining fields to the best of their ability and submit the case.

Description of issue

Please describe the issue as well as possible. What do you expect to happen and what did you experience?

When I submit a D1 declaration I get errors in PlaceOfLoading and PlaceOfUnloading. I have tried to change the elements, but it still won't get accepted.

Error message

You can write the error-messages here, copy/paste them, or attach them as files to the case.


```
<FunctionalError>
   <errorPointer>/CC015C/Consignment/PlaceOfUnloading</errorPointer>
   <errorCode>50</errorCode>
   <errorReason>B1858</errorReason>
 </FunctionalError>
 <FunctionalError>
   <errorPointer>/CC015C/Consignment/PlaceOfLoading</errorPointer>
   <errorCode>50</errorCode>
   <errorReason>B1893</errorReason>
 </FunctionalError>
 <FunctionalError>
   <errorPointer>/CC015C/TransitOperation/security</errorPointer>
   <errorCode>12</errorCode>
   <errorReason>CL217</errorReason>
   <originalAttributeValue>5</originalAttributeValue>
 </FunctionalError>
```


Steps to reproduce

Write down the steps employed to reproduce the issue. Feel free to attach declarations as files to the case.

I have attached the XML to the D1 I submitted to this case.

Additional Comments

Please write any additional information or comments here.

They have also attached the declaration they submitted. The most common file types are accepted as attachment.

Upload files

Drag your files here to upload or click to browse

D1_TestFile.txt

The case, filled out with all relevant information, is now submitted for the Onboarding Team to begin support.

3.1.2 Updating a case

Whenever it becomes necessary for the user to update a case, the steps are as follows:

- Open the case. This is done by clicking on the case title on the homepage.
- Click the edit button at the bottom of the page.
- Fill out the response with the relevant information.
- Change the status of the case dependent on the situation.
- Submit the updated case by pressing the submit button at the bottom of the page.

3.2 Case Handling

Once a case has been submitted it will pass through a number of different statuses. The explanation of what the case status means as well as the general flow observed when handling cases will be described in the following sections.

3.2.1 Case status

10 – New: This is the state of the case when it is first made. At this point the case is unassigned, and no work has been done. No action required by the user.

30 – Assigned: The case has now been assigned to a supporter from the Onboarding Team. Work will commence once time permits. No action required by the user.

31 – Started: Work on the case has commenced. No action required by the user

40 – Migrated to Test: A potential solution has been found and it is now up to the user to test the proposed solution.

51 – Test OK: If the proposed solution was successful the user should set the status of the case to this. The supporter will then close the case.

52 – Test not OK: If the solution did not work as intended or a new problem presented itself as a result of the solution, the status should be set to this by the user. The new circumstances should be thoroughly explained so that the supporter can analyse and solve the problem at hand.

80 – Awaiting Customer: If the supporter needs more information from the user, the supporter will set the status to this. It is now the responsibility of the user to provide the necessary information for the case to proceed.

81 – Awaiting 3rd Party: The case is put in this state if other parties are needed to solve parts of the case. This will most of the time be used whenever a case is forwarded to AS4 for them to fix an issue pertaining to a user. This status does not require any action by the user.

83 – Awaiting Release: Sometimes an issue is a bug in the system or requires a feature to be introduced into the system to be solved. In that situation, the case is put into this status. When the feature is introduced or the bug is fixed, the case will be updated. The time a case can spend in this state is considerable, as the problem is now handled by other parties. No action is required on the part of the user.

90 – Closed: If the case is solved, the supporter will put the case into this status. At this point it is no longer being worked on. This need not follow a status 51 but can be determined by the supporter. Should the user disagree with this assertion, they are free to reopen the case by changing the status to 11 – Received, from where a supporter will pick up the case again.

91 – Rejected: Should a case be deemed invalid in one form or another, the supporters have the discretion to reject a case. This could be due to the case being a duplicate, the case missing basic information, or the case not being an issue the Onboarding Team handles.

NB! Please be aware that as a user of Customer Portal you are not able to close cases, so in the case of a wrongly created case, please update the case by using the “Response” field in the case in Edit-mode letting the Onboarding Team know that the case is no longer relevant.

3.2.2 Case flow

A case will progress through the different statuses in different ways. Below is shown a general flowchart describing the case flow.

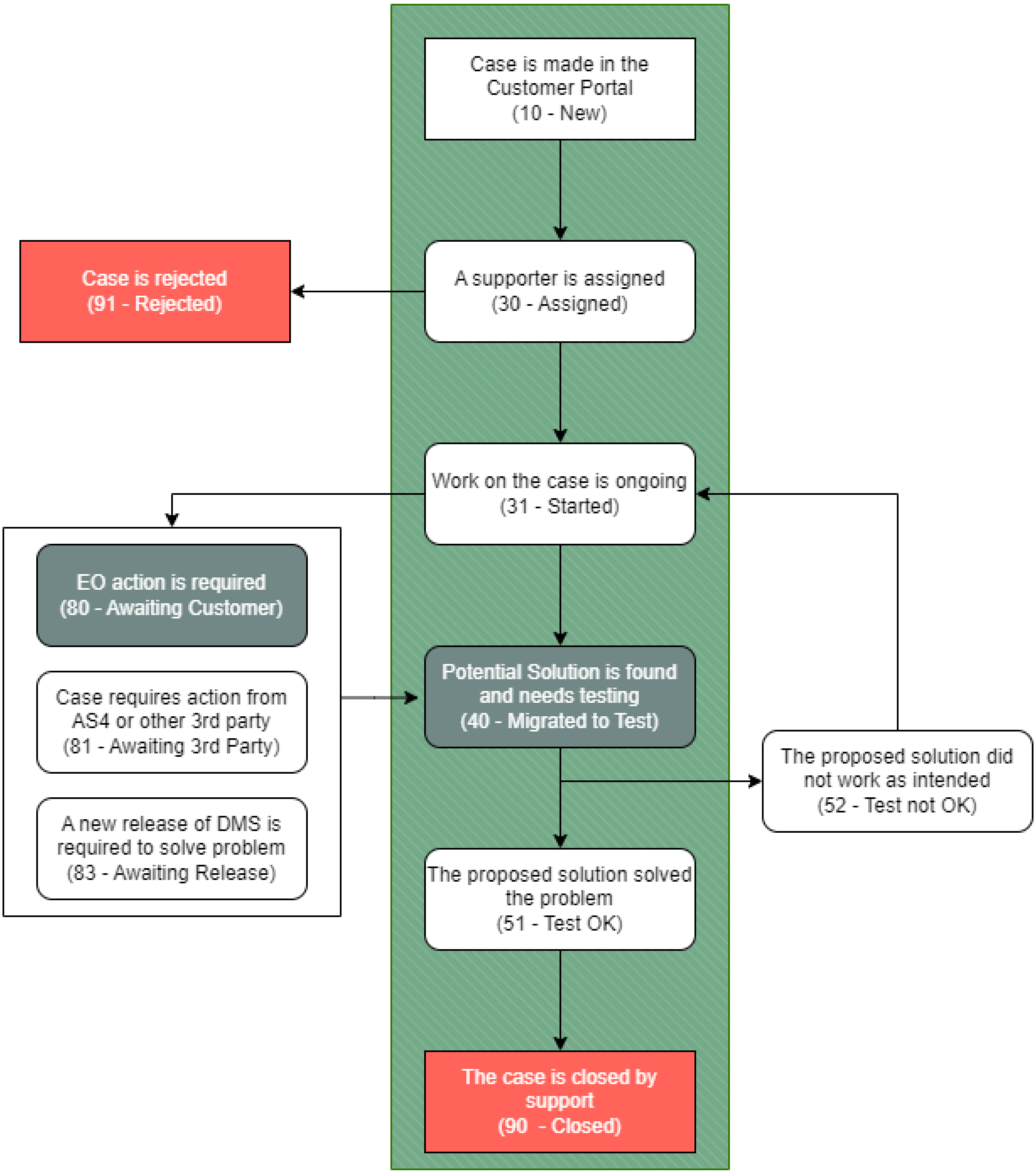


Figure 2 - Customer Portal status flow chart

The red boxes are end states, from which the case no longer will be worked on, the grey boxes are states requiring the user to act. The green box in the centre marks the shortest flow to solve a case. From there, deviations are listed. On the left are listed the three possible ways the case can be blocked from the support side as input is needed from either the user, a 3rd party, or awaiting a new release. Only one of these require the user to act. On the right is the other flow deviation, where the proposed solution does not solve the stated problem, or a new problem presents itself as a result of the solution provided. When this happens, the supporter will have an additional look at the case until a new solution is found. The flow can follow the arrows in several different ways, but the goal is always to reach status 51 on the part of the user. From there, the supporter can set the case to status 90 and close it.

4 Inviting new users to Organization

In order to invite new users, the user needs to create a “DMS S2S: New User to Organization Creation” case.

Fill out the relevant information detailed in the case description. From here, the Onboarding Team creates the user and assigns them to your organization.

The new user will get an e-mail inviting them to the Customer Portal. The new user should verify their connectivity by making sure they are able to see the cases submitted by the organization.