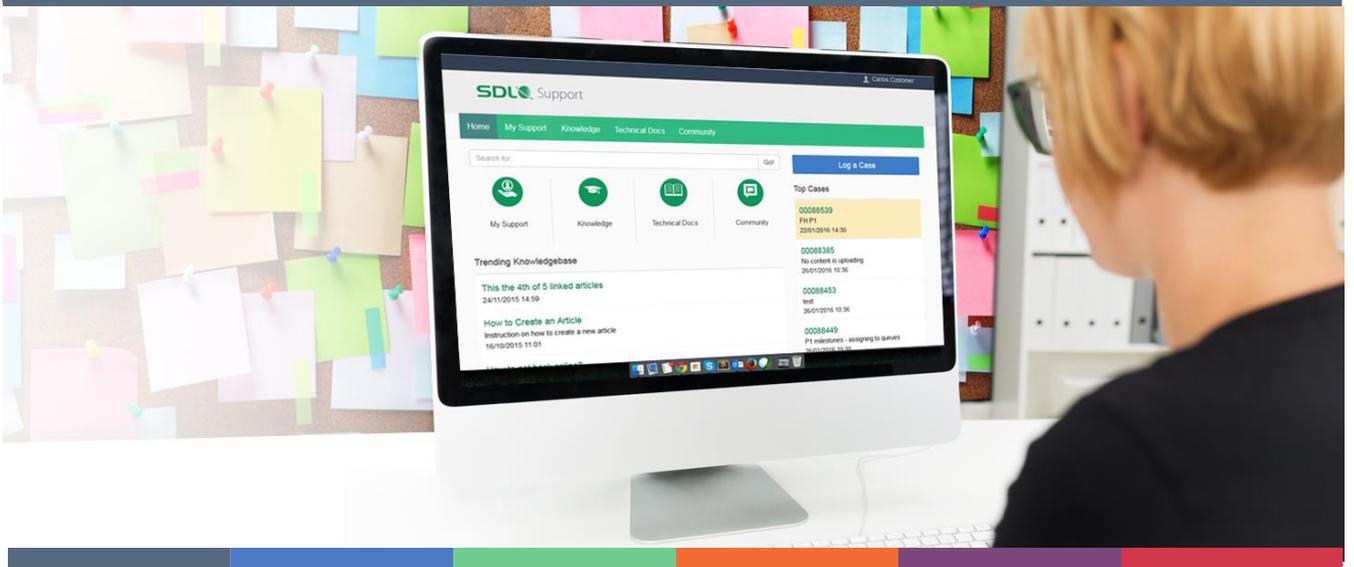




SDL Customer Gateway

User Guide



We are delighted to introduce our new and improved Customer Support Portal, powered by ServiceCloud from Salesforce.com, called SDL Customer Gateway Portal.

SDL Customer Gateway offers customers greater functionality in a simplified interface and one location from which you can log a case, access our knowledgebase, download technical documentation or interact with SDL Community!

We are excited about the system and have plans to extend the functionality and user experience in future phases. If you have any questions, please contact us at customer_programs@sdl.com.

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Introduction to the SDL Customer Gateway

The SDL Customer Gateway can be reached by clicking on **Log a support request** under the **Support** menu on the SDL Web home page www.sdl.com. Alternatively, you can access the SDL Customer Gateway directly at gateway.sdl.com.

Supported Browsers

- Chrome (latest)
- Internet Explorer 9+
(Internet Explorer 10 or above is recommended since it allows multiple attachments)
- Mozilla Firefox (latest)
- Microsoft Edge (latest)

Available Support Tools

The support tools available to you depend on whether you have logged in or not.

Users who have not logged in	Users who are logged in
View Trending Knowledge Base articles	View Trending Knowledge Base articles
Access to Knowledge Base	Access to Knowledge Base
Access to Product Technical documentation	Access to Product Technical documentation
Access to SDL Communities (some Community Groups may require an SDL ID)	Access to ALL SDL Communities
	View Major Incidents / Support Announcements
	Log a Support Case
	View/Search your open and closed cases
	View/Search open and closed cases reported by other members of your customer group.

Logging into the SDL Customer Gateway

Existing User

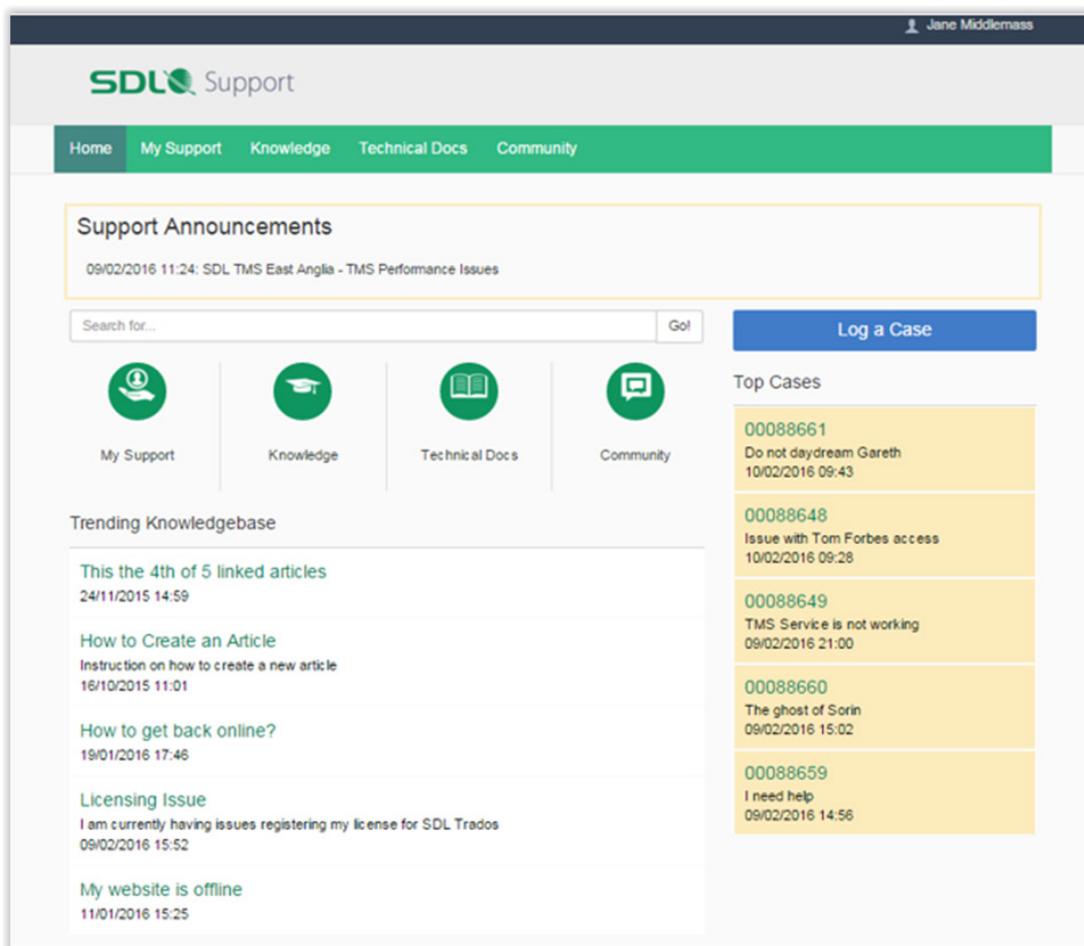
If you are an existing user, you can log into the SDL Customer Gateway directly by entering your SDL ID username and password. If you have forgotten your password, use the **Forgot Password** link to reset it.

New User

If you are a new user, you can create a SDL ID by clicking the **Login/Register** link found in the top right hand corner of the SDL Customer Gateway home page.

SDL Customer Gateway home page overview

This screenshot reflects the layout of the SDL Customer Gateway home page for a user who has just logged in. A similar layout is presented to a user who has not logged in, however certain parts of the Gateway will not be available as outlined in the section [Available Support Tools](#).



The screenshot shows the SDL Customer Gateway home page for a user named Jane Middlemass. The page features a navigation bar with links for Home, My Support, Knowledge, Technical Docs, and Community. The main content area includes a 'Support Announcements' section with a recent announcement from 09/02/2016. Below this is a search bar and a 'Log a Case' button. The page is divided into four main sections: My Support, Knowledge, Technical Docs, and Community, each with a corresponding icon. On the right side, there is a 'Top Cases' section listing several open cases with their IDs and titles. At the bottom left, there is a 'Trending Knowledgebase' section with several articles listed, including 'This the 4th of 5 linked articles', 'How to Create an Article', 'How to get back online?', 'Licensing Issue', and 'My website is offline'.

Major Incidents / Support Announcements

Any Major Incidents that relate to your SDL product hosted by SDL are highlighted at the top of the SDL Customer Gateway.

Search

The **Search for knowledge** field performs a search for a keyword(s) to help locate a relevant article in the knowledgebase.

My Support

To access your cases click the **My Support** link from the menu bar and you will be taken to the **Open Cases** tab. If wish to view a case opened by someone else within your organization, click the **Show all cases** checkbox. If you wish to view a closed case, go to the **Closed** tab. You can also perform a search for cases containing a specified keyword(s).

Knowledge

To access the knowledgebase click the **Knowledge** link on the menu bar. Knowledgebase articles can be filtered by article type (such as **FAQ**, **Product Lifecycle Information**, **Reference Article** or **Release Information**) or by **SDL Product** under **Data Filters**. Products listed under **Category Filters** are arranged in a hierarchy and clicking on a product group lists the individual products. See the [Knowledge](#) section for more information.

Technical Docs

To access product documentation (such as *installation guides* or *troubleshooting guides*) click the **Technical Docs** link on the menu bar.

Community

To access the SDL Community click the **Community** link from the menu bar.

Log a Case

Ensure you are logged into the SDL Customer Gateway. Then from either the **Home**, **Knowledge** or **My Support** links on the menu bar, click the **Log a Case** button to log a new case with SDL Support. See the [Creating a case](#) section for more information.

Top Cases

This lists cases submitted by you, which have most recently been updated by SDL Support, or yourself.

Latest Articles

This section lists the most recent published knowledge base articles.

Creating a case

You are able to log cases against the SDL products for which you purchased a PSMA or a Support & Maintenance agreement.

For Translation Productivity products only, you can log installation or license cases without having purchased a PSMA.

How to Log a Case

1. Log in to the **SDL Customer Gateway** using your My SDL account credentials.
2. Click the **Log a Case** button.
3. Complete all mandatory fields marked with an (*), such as **Product**, **Subject**, **Description**, **Service Impact** and **Urgency**.
4. **Product:** Select from the drop down menu.
5. **Environment:** Select from the drop down menu.
6. **Subject:** When entering text under the Subject field, this propagates to search for **Suggested Articles** on the right hand side of the page.
7. **Description:** Describe the issue you are encountering, detailing steps to recreate the issue and include information such as error messages received and the environment the issue is occurring on, if this is known.
8. **Service Impact:** Select from the drop down menu and complete the **Description** field. The Description field is optional, however it will help determine the Service Impact for Support. For example: *Number of people/users impacted. Is there are workaround?*
9. **Urgency:** Select from the drop down menu and complete the **Description** field. As stated in the Service Impact field it is optional, however it will help determine the Urgency for Support. For example: *Are there any upcoming deadlines?*
10. **Customer Reference:** Optional field for your own internal IT ticket number or relevant information.
11. **File Attachments:** You can add up to 5 attachment fields which is located the bottom of the form, each file has a 10MB size limit.
12. Click on **Submit Case**.
13. If any of the mandatory fields are left blank, an error message appears *Case cannot be submitted*. Review and complete all mandatory fields marked with an (*). The incomplete fields are highlighted.

Once the case has been submitted you will see a **Case Detail Summary** page with your unique case ID. To the right hand side there will be a **Quick Actions** section, refer to [Quick Actions](#) section for further information.

Impact and Urgency

When logging a case it is mandatory to select the impact and urgency of the issue you are experiencing.

The list of impact options are:

- Some users/ workaround in place
- All users/ workaround in place
- Some users / no workaround
- All users / no workaround

Please provide as much information as possible about the impact in the text field as this helps the Support teams prioritise your case correctly.

The list of urgency options are:

- **Low:** Issue causes inconvenience but functions still available, issue could be cosmetic in nature
- **Medium:** Certain functions may not be available, business process is affected
- **High:** Issue causes a malfunction that stops business process and inhibits action, customer cannot work
- **Critical:** Issue causes a crash or customer data loss, continual failure of a major function of the system.

Please provide as much information as possible about the urgency of the issue in the text field and include such information such as 'upcoming deadlines'.

Customers with Expired PSMA/no PSMA

For Translation Productivity products only, customers who are not (sufficiently) helped by the Knowledge Base can make use of web form to log a free case log installation or license issues without having purchased a PSMA.

A link to the Web Form can be found at the bottom of Knowledge Articles concerning license and installation issues.

My Support

In the **My Support** section of the Gateway, you can toggle between viewing just your own cases or all of the organization's cases using the **Show all cases** tick box.

Cases are split between two tabs: **Open Cases** and **Closed Cases**.

Both tabs have columns that can be sorted on such as, **Unread, Case number, Subject, Priority, Status, Product, Customer reference** or **Modified date/time**.

When an SDL Support Engineer updates a case, the same support case ID is marked as **Unread** in the client portal. This is highlighted by a tick in the **Unread** column and the row text is in bold.

In the **Case Number** column, you can click on any case to go through to the case details page. From the case details, you have the option to escalate a case if required. See the [Escalate a case](#) section for more information.

You can also de-escalate a case. To do this the open the appropriate case from the **My Support** screen and click **Request De-escalation** from the **Quick Actions** list. You should complete the **Comment** field and click the **Request** button to confirm.

Case Status

Different statuses are used throughout the lifecycle of a case:

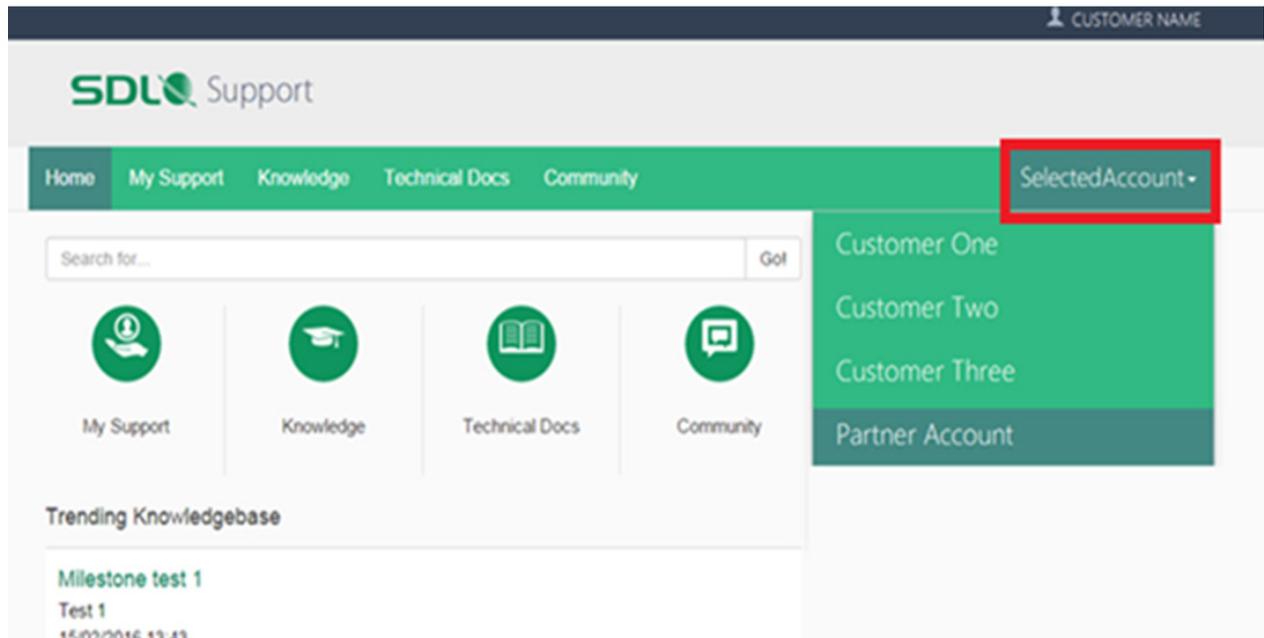
- **New Raised:** Customer has opened the case
- **With SDL:** The Support team is working on the case
- **With Customer:** Action and/or response from the customer is required
- **Resolved:** Workaround, explanation and/or fix has been provided
- **Resolved (Defect Raised):** Workaround or explanation provided and a defect has been raised with the development team
- **Closed:** Case is now archived and can no longer be updated – if the issue reoccurs, a new case will need to be logged.
- **Closed (Defect Raised):** Case is now archived and can no longer be updated – the associated defect raised with the development team remains open.

When a case is set to either resolved status by an SDL Support Engineer there will be an option under **Quick Actions** for you to confirm the resolution works for you and to select **Close Case**. If the resolution does not work for you, there is the option to **Reopen Case** under **Quick Actions**. The case will be set to status **With SDL** and the Support team will continue to work on it.

After a case is closed, it will be moved to the **Closed** section in **My Support**. Closed cases cannot be reopened.

Creating a case if you are a partner

As a Partner, you can view, update and close cases on behalf of a customer. When you log into the SDL Customer Gateway (by default) you will see your Partner name on the right hand side of the menu.



To log a ticket on behalf of a customer select the relevant account from the dropdown menu. You can switch accounts at any time.

To create a case refer to the [Creating a case](#) section.

View cases for another accounts under your partner account

From the menu bar when creating a case, select the relevant account you need to view and click on **My Support**.

Reviewing a case

To update, review or escalate your cases you must be logged into the [SDL Customer Gateway](#).

To View your open cases

1. Click **My Support** located in the top menu.
2. From the **Open Cases** tab you will see the cases that have been submitted under your account that are currently open, if you do not see a case that has been opened by another person within your organization click the **Show all cases** check box.
3. Click on the case ID you would like to view.

To view your closed cases

1. Click **My Support** located in the top menu.
2. From the **Closed Cases** tab you will see the cases that have been submitted under your account and are currently closed, if you do not see a case that has been opened by another person in your organization click the **Show all cases** checkbox.
3. Click on the case ID you would like to view.

Updating a case

If a case is in a status other than **Closed** you can update the case. Navigate to the case that requires the update.

Adding a Comment to your case

You can update a case by adding a comment, or replying directly to the email notification. If you are responding via email, ensure that the subject line remains unchanged.

To add a comment to your case:

1. Open your case in the SDL Customer Gateway.
2. From the **Quick Actions** menu select **Add a Comment**.
3. Enter your comment in the **Comment** box.
4. Click **Submit** to save changes.

Managing Case Contacts

If additional people are to be notified when your case is updated you can add them as an additional case contact(s). This is managed on a case-by-case basis.

1. Navigate to the case.
2. From the **Quick Actions** menu, select **Manage Case Contacts**.
3. Using the dropdown box in the **Contacts** section select the contact you would like to add as an additional email address, then click the **+** button. To remove a contact, select the name and click the **-** button. You can add an email address which is not listed as a pre-defined contact by entering their email address in the **Additional Email Addresses** section and clicking the **+** button.
4. Click **Submit** to save changes.

Adding attachments to your case

While a case is open, you can continue to add attachments.

1. Navigate to the case.
2. Using the **Quick Actions** menu, select **Add Attachments**.
3. In the **Select File** section, click **Choose file**.
4. Browse to the file requires uploading and double click.
5. Use the **Comment** box to add specific information.
6. Click **Submit** to save changes.
7. The attachment is now be visible in the **Attachments** tab when viewing the case.

If you are uploading multiple files, you can add them in a zip file format.

Changing the priority and/or urgency of a case

You can change the priority and/or urgency of a case at any time.

1. Navigate to the case.
2. Click the **Update Impact/Urgency** link in the **Quick Actions** menu when viewing your case.
3. Select from the drop down menus the revised **Service Impact** and **Urgency**.
4. Enter notes in the **Comments** box explaining why the impact and/or urgency has changed.
5. Click **Submit** to save changes.

Escalate a case

You can request an escalation of a case at any time.

First Escalation



If an escalation is required, log in to the [SDL Customer Gateway](#) and click **Request Escalation** from the **Quick Actions** section when viewing your case. When completing this process you will be required to provide additional information to support your escalation request. Once you have requested an escalation the title of your case will be pre-fixed with a yellow icon.



The Support Engineer working on your case will evaluate your case and the escalation request as per the SDL Technical Support Service Policy and, if accepted, the icon changes to red. The Support Engineer will then conduct research, engage with experts and develop an action plan to resolve the issue.

Second Escalation

If a resolution is not reached and you would like to further escalate the case, contact the local Support Manager. In order to do so please send an e-mail to the Support Managers group at supportmanagers@sdl.com with a brief explanation. A member of the management team will respond promptly to your request.

Third Escalation

If a resolution still has not been reached and you would like to escalate the case further, contact the Regional Support Director. In order to do so please send an e-mail for the APAC region to dcui@sdl.com, for the EMEA region to dvelsink@sdl.com or for the NASA region to cbumbaca@sdl.com. The Regional Director respond promptly to your request.

If an escalation is rejected the icon disappears. You can re-request an escalation at any time.

Re-opening a case

You can only re-open a case if its status is set to **Resolved**. To re-open a case, log in to the SDL Customer Gateway and select **Reopen Case** from **Quick Actions** menu. You will be required to provide information as to why you would like the case re-opened.

After 7 days, the case is permanently closed and cannot be re-opened. If the issue has been fully resolved, you can close the case manually. See the [Resolving a case](#) section for more information.

Resolving a case

When viewing a case in the SDL Customer Gateway you will find the **Quick Actions** area on the right hand side, allowing you to perform various actions on your case. The table below provides an overview of what each available option does:

Quick Actions

Action	Description
Add a Comment	Use this to add a comment to your case.
Add Attachment	Use this to provide SDL with files (such as screenshots, logs, configuration files) to you case.
Close Case	Close your case.
Update Impact/Urgency	Change the Impact/Urgency of your case.
Request Escalation	Request that your case is escalated. This will need to be approved by Senior Management.
Request De-escalation	De-escalate a case that has been escalated.

Closing a case

You can close a case at any time. Open the case and select **Close Case** located in the **Quick Actions** section. Enter a **Resolution** and click **Close**.

Your case will move from the **Open Cases** tab to **Closed Cases** tab.

Once a case has been closed, it cannot be reopened. If you do encounter the issue again, please raise a new case.

Feedback forms

Once a case is closed, a survey form will be sent to you to complete if you wish to provide feedback regarding your experience engaging with SDL Support.

Auto Closed after 7 days

When a case status is changed to **Resolved**, it will remain in the **Open Cases** tab for 7 calendar days before it is automatically closed. You can close it sooner.

Knowledge

The Knowledge tab is an area in which customers and partners can access and quickly find articles that are relevant to their queries. When accessing the **Knowledge** tab via the SDL Customer Gateway the following is displayed:

- Search bar, used to search articles
- A list of trending articles.
- Filters for type and category.

Searching Articles

Enter your search terms in the **Search for knowledge** box such as error codes or messages. You can use search wildcards and operators in your search terms. *You can use search wildcards (*) and operators (AND / OR) in your search terms.*

Filtering Articles

Article Types

The articles available are grouped based on type of article:

- FAQ
- Product Lifecycle Information
- Reference Article
- Release Information
- Solution Article
- User guide

You can filter the list of articles by these groups and can select multiple groups to be displayed. A selected option will appear highlighted and can be deselected by clicking on it again.

Category filters

Category filters are available in the **Knowledge** tab to help users find articles or questions. Articles are classified into logical categories so you can quickly and easily locate the article you need by filtering SDL's knowledge base. To ensure you see all relevant articles, filtering by category has expansive results that include a category's upward and downward relatives in the category hierarchy. For example, if your category hierarchy for Translation Productivity has the levels *SDL Trados Studio > File type Support* and you are filtering by *File type Support* the knowledge base returns articles classified with both *File type Support* and *SDL Trados Studio*. To prevent irrelevant results, category filtering does not return nonlinear relatives like siblings and cousins. For example, articles about Multiterm (a sibling of SDL Trados Studio) will not be displayed.

When a category filter is selected, you can use the **Back** button to move to the previous category group or the **Clear All** button to reset the filter.

Article rating

When opening an article you can see how many users found that article useful. Only authenticated users can rate articles by clicking on the **thumbs up** or **thumbs down** buttons.

About SDL

SDL (LSE: SDL) is the leader in global content management and language solutions. With more than 20 years of experience, SDL helps companies build relevant digital experiences that deliver transformative business results on a global scale.

Seventy-nine of the top 100 global brands trust SDL to simplify the complexity of managing content across multiple brands, websites, languages, and devices. Go global faster with SDL.

Learn more at [SDL.com](https://www.sdl.com) and follow us on [Twitter](#), [LinkedIn](#) and [Facebook](#).

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