KYOCERA SERVICE PORTAL

REFERENCE GUIDE AND TUTORIAL

FOR

KDE SALES COMPANIES

AND

(INTERNATIONAL) PARTNERS

JULY 2019

Document Solutions

1. CONTENT

2. KYOCERA DEFINITIONS AND ABBREVIATIONS

CSSD	Customer Services & Support Division
ITSM	IT Service Management
SMS	Service Management System
KDC	KYOCERA Document Solutions Corporation – Japan
KDE	KYOCERA Document Solutions Europe B.V.
SC	Sales Company
KDIS	Kyocera Document Solutions International Sales
KPI	Key Performance Indicator
KDE BOG	Kyocera Document Solutions B.V. Branch Office Germany

3. DEFINITION

The Kyocera Service Portal Reference Guide is intended to describe all functions and features of the Service portal. The Portal is offered as a Service to Kyocera Sales Companies and Kyocera international partners.

This document does not cover any SLA or fees. Please read the respective corresponding documentation for these details.

4. OBJECTIVES

The objectives of the Service Portal are as follows:

Present a clear, easy to use, concise and measurable reporting of

- Incidents
- Warranty Questions
- Professional Service Requests
- License Requests

5. REQUIREMENTS

The requirements for the usage of the Kyocera Service Portal are described in the next chapters.

6. TECHNICAL

- An active Internet connection with access to the Kyocera Service portal url:
  - https://sms.kyoceradocumentsolutions.eu/login
- The following browsers and their respective versions are supported: Google Chrome

7. ORGANISATIONAL

Access to the portal is only granted to the following users:

- Employees of Kyocera Sales Companies
- Employees of Kyocera International Partners
- OEM
- 3rd party Development partners

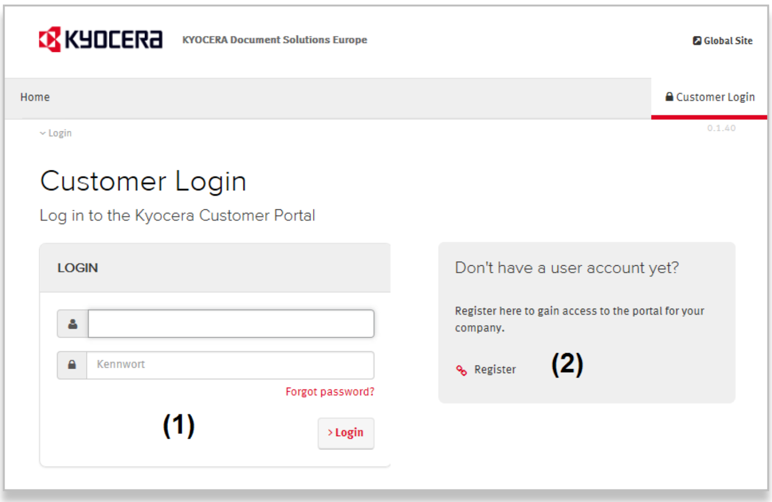
All users have to register themselves to the portal before using it. During the registration process the terms and conditions as well as the data privacy policy have to be accepted.

8. ACCESSING THE PORTAL

Registered users can access the portal using the following url:

https://sms.kyoceradocumentsolutions.eu/login

You will be presented a webpage looking as follows:

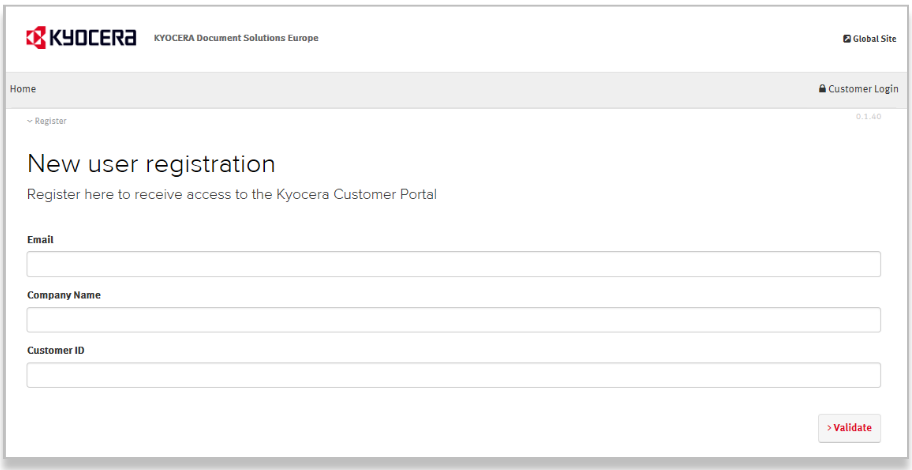


Picture 1

(1) This is the standard login screen.
(2) This area is used to initiate the new user registration

9. NEW USER REGISTRATION

To initiate the new user registration, please click on "Register" (see Picture 1). You will be redirected to the registration wizard that guides you through the complete process.



Picture 2

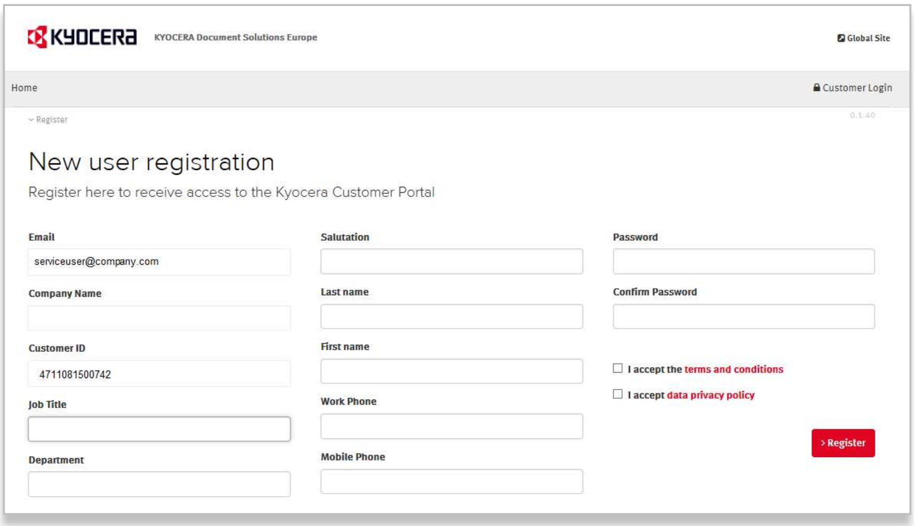
Please fill in all fields.

Email: Please use your companies email address. Hotmail, Yahoo, GMX or similar email addresses are not accepted for automatic user registration.

Company Name: This field will identify the company you are working for.

Customer ID: If you are a Kyocera Sales Company or a registered Kyocera partner you have received a customer ID from us. Please enter the number here. Do not skip leading or trailing zeros when entering your id.

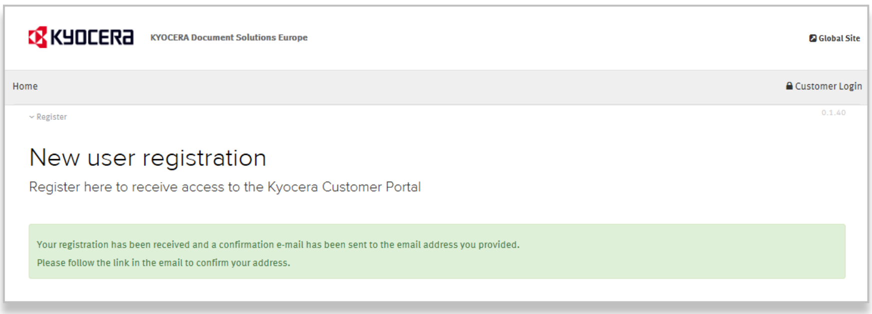
When all data is entered, click on validate.



Picture 3

If you have entered correct Customer ID and email address, you have to continue your registration by filling in the form as shown in Picture 3.

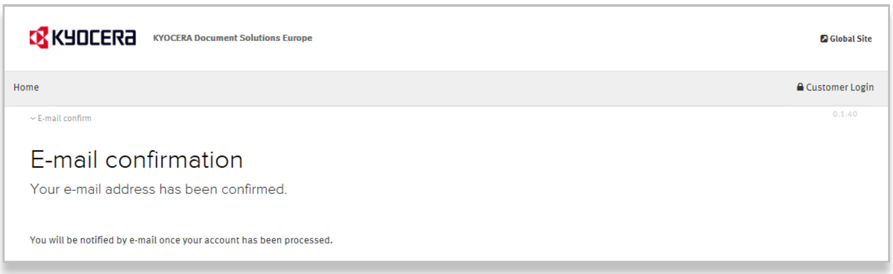
Before clicking on 'Register' make sure to read and accept our terms and conditions and the data privacy policy.



Picture 4

You are now almost done. To verify that nobody did register you without your consent and to check that the email address provided is valid and accessible by you, an email with a confirmation link is sent to the email address you have provided during registration.

Only after clicking on the link in the verification email, the registration will be completed.



Picture 5

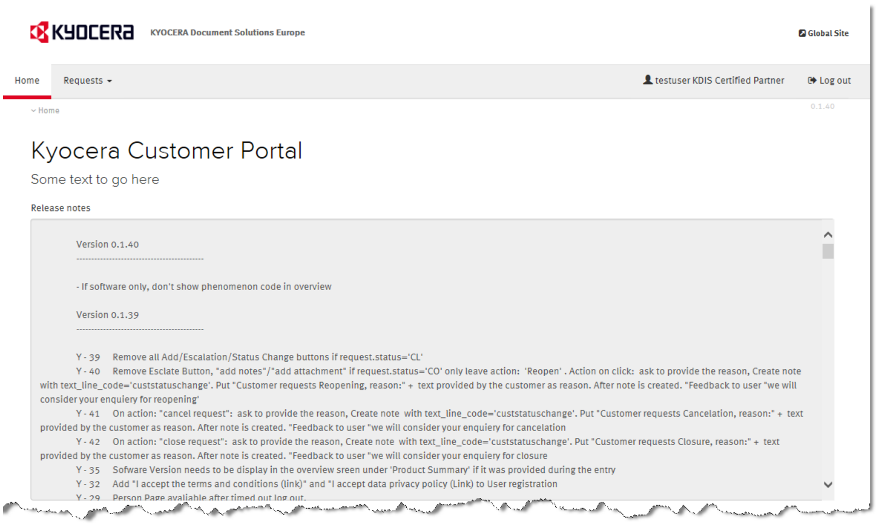
Now registration and setting up your account is ready. Once the system has processed your registration you will receive an automated email to inform you that you are now able to use the portal.

10. USING THE PORTAL

10.1. PORTAL LOGON

Please logon to the portal using the logon area as shown in Picture 1. As user id please use your email that you have registered during user registration process and your password.

Once successfully authenticated you will see the portal:



Picture 6

The details shown in Picture 6 are just samples and may vary from what you are actually seeing.

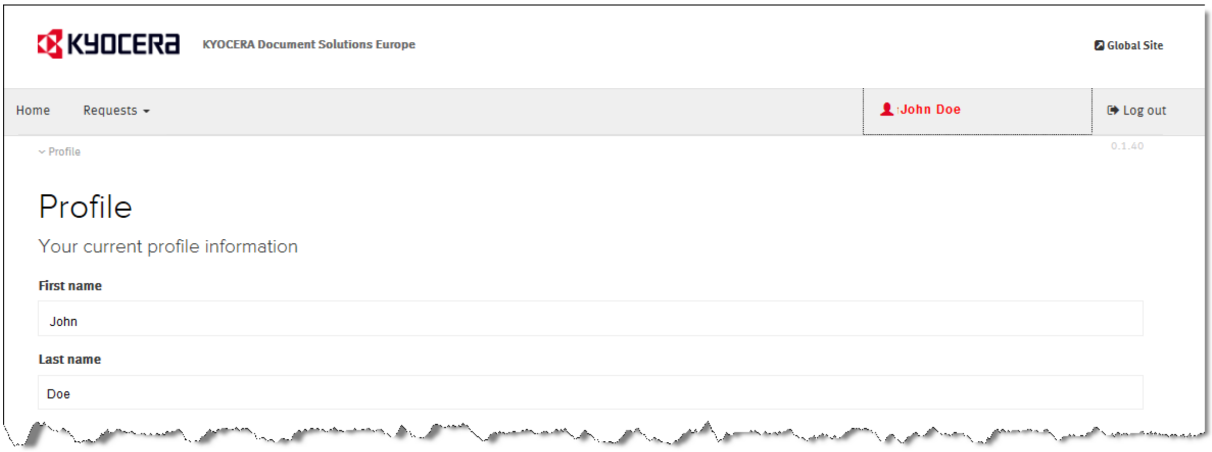
10.2. LOG OUT

To logout from the system please click on the logout link shown in the menu (Picture 7).
Please be sure to log out as the system does not allow simultaneous logins for the same user.

10.3. USER PROFILE

The user profile shows the details you have entered during user registration.

John



Picture 7

You can open the profile information by clicking on your name shown in the menu. Please verify the data entered here.

Currently the following details are shown in the profile:

- Salutation
- Last Name
- First name
- Phone
- Mobile
- E-mail
- Company Name
- Customer ID

10.3.1. CHANGE PASSWORD

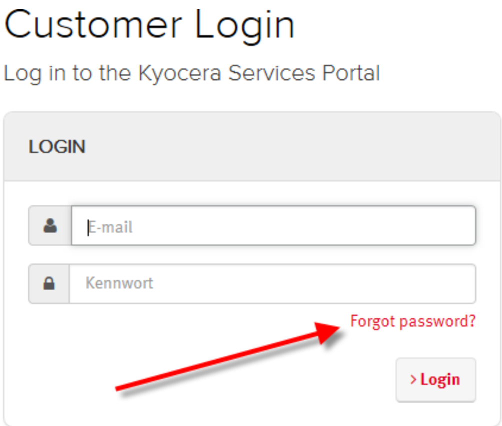
From time to time it might be necessary to change your Service Portal password. Either because the password change interval has been expired or you want to change the password by yourself.

If you want to change the password by yourself, you can do this easily in the profile page.

Picture 8

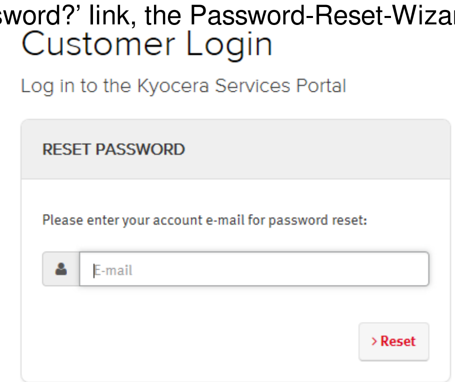
On the right side of the profile page you can enter the new password. Please confirm it in the second edit box to avoid locking out yourself with an unseen typo.

In case the password has expired, you will no longer be able to logon. In these cases you simply have to use the ‘Forgot password?’ wizard on the login page.



Picture 9

Once clicked on the ’Forgot Password?’ link, the Password-Reset-Wizard will be initiated.



Picture 10

Just enter the email used during your registration and a confirmation email will be sent out. Within this conformation email you will find a link that finalizes the reset process.

The email sent by the Kyocera Services Portal will look like this:

You have requested a password reset via the Kyocera Services Portal.

To verify that this email address belongs to you, please follow this link to verify this user and allow access:
https://sms.kyoceradocumentsolutions.eu/login/reset-verify/tester@deu.kyocera.com/5A18AA0BB9607CECF3D9DECB8196605EED72AF4F3EA7F6CD89B12ADB93C5D70F

Picture 11

If you click on the link provided in the verification email you will receive a new password by email:

You have requested a password reset via the Kyocera Services Portal.

You can now log in using the password below:

jWP2Sbe3YRsxhwG

This password will be valid for 1 day only. Please change the password in your Profile.

Picture 12

Please use this password to logon to the password and open your profile to set a new password or just use the random password you have just received. Changing the password is highly recommended.

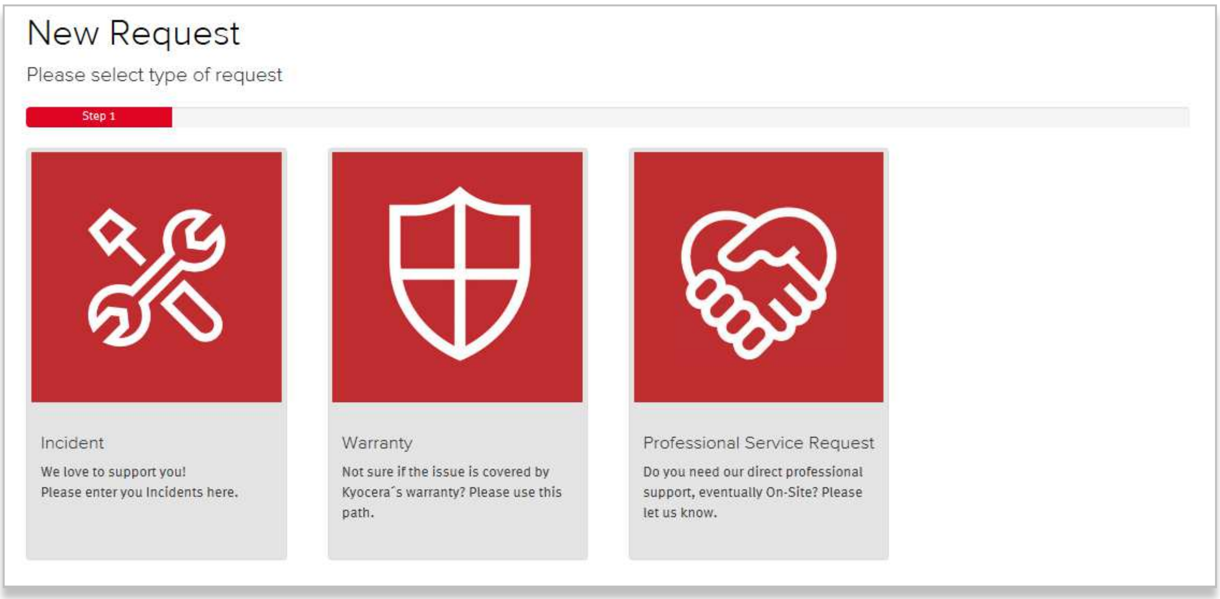
10.4. REQUEST MANAGING

To manage your requests, please click on the 'Requests' menu entry in the main menu as shown in Picture 13.

Picture 13

10.4.1. CREATING NEW REQUESTS

The process for creating new requests is completely wizard driven to ease the process of entering all required data.

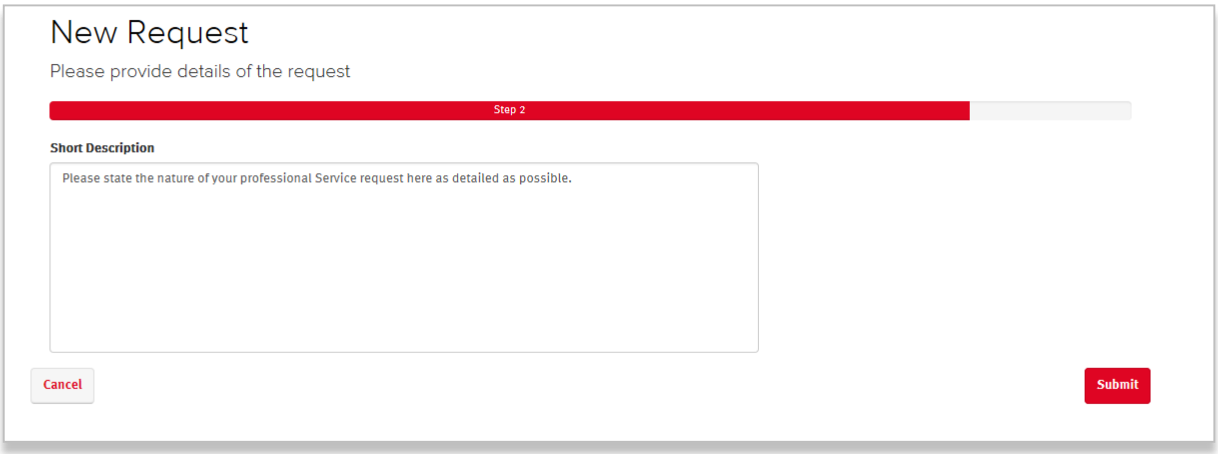


Picture 14

Depending on your qualification and classification you will be offered one or more options to select from. In the future we might add more wizards for your convenience here. In the following chapters the currently available options will be described in detail.
Please start the wizard you need by clicking on the respective icon.

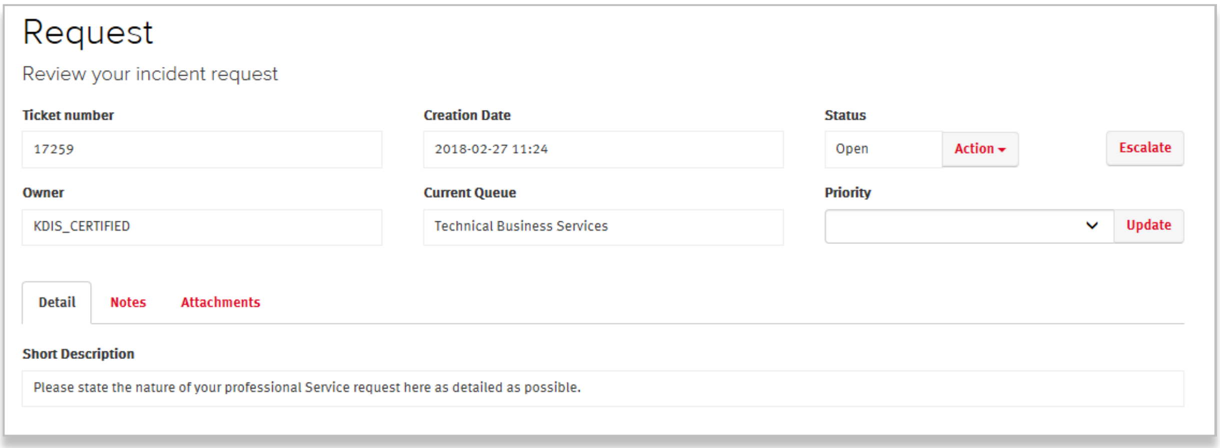
10.4.1.1. Professional Service Request

This wizard is the easiest and simplest of all available. In the "Short Description" field describe the professional service you would like to request from us as detailed as possible and needed.



Picture 15

If all information is provided click on submit.



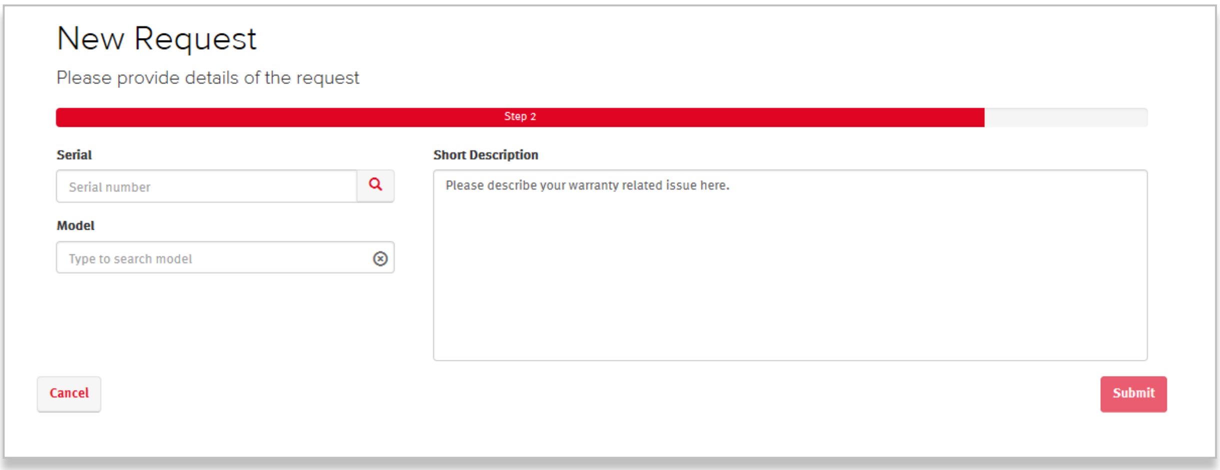
Picture 16

As a result of a successful registration you will be shown a summary of the details and a confirmation email about the request creation will be sent to you.

The details of the available TABs, buttons and drop down boxes will be explained in the chapter "Incident request" on page 14.

10.4.1.2. Warranty Request

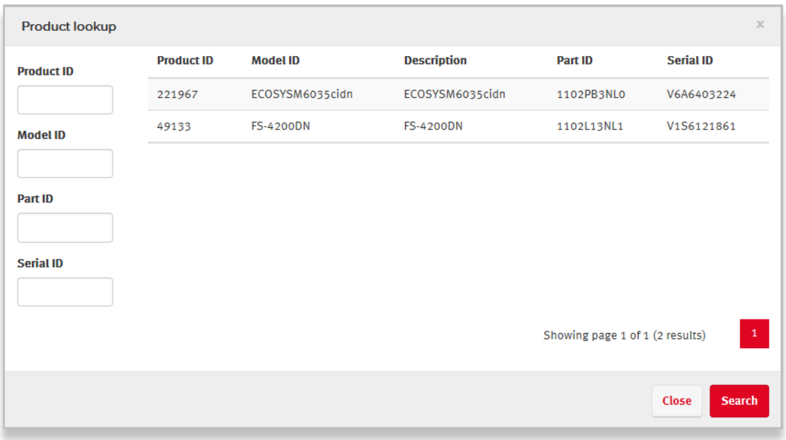
Any warranty request should reference a serial number or a model at least. Ideally you have a serial number at hand to allow us to answer your question as accurate as possible.



Picture 17

You can either manually type in the serial number in the appropriate field as shown in Picture 17 or by clicking on the magnifying glass.

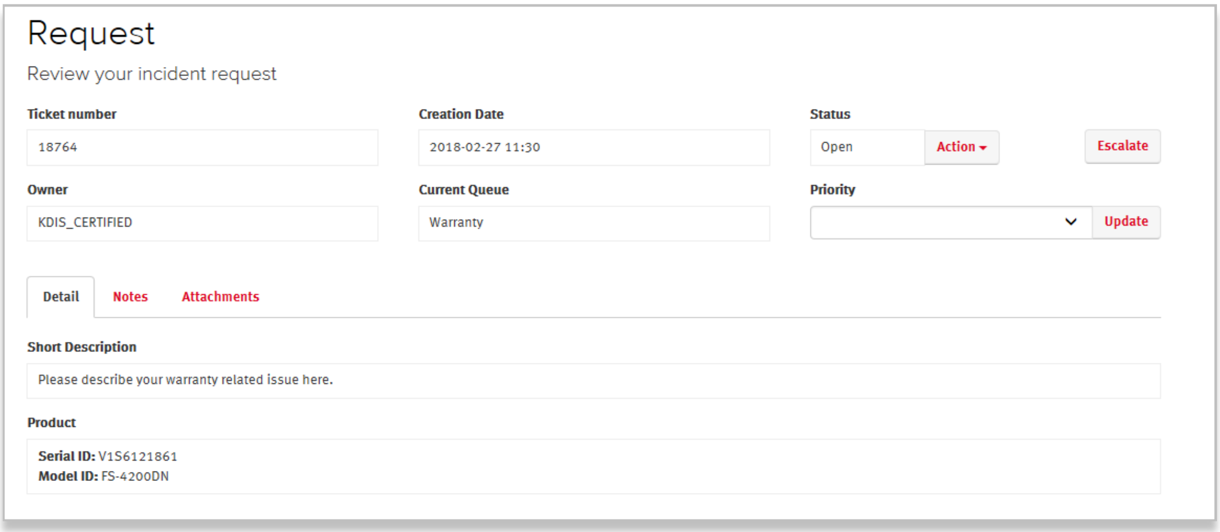
The latter will present you with a detailed search box:



Picture 18

You filter the results list by adding details to the available fields. You will only be presented with serial numbers of devices that you have ordered from Kyocera.

Once you have provided the correct and complete details click on submit (Picture 17).



Picture 19

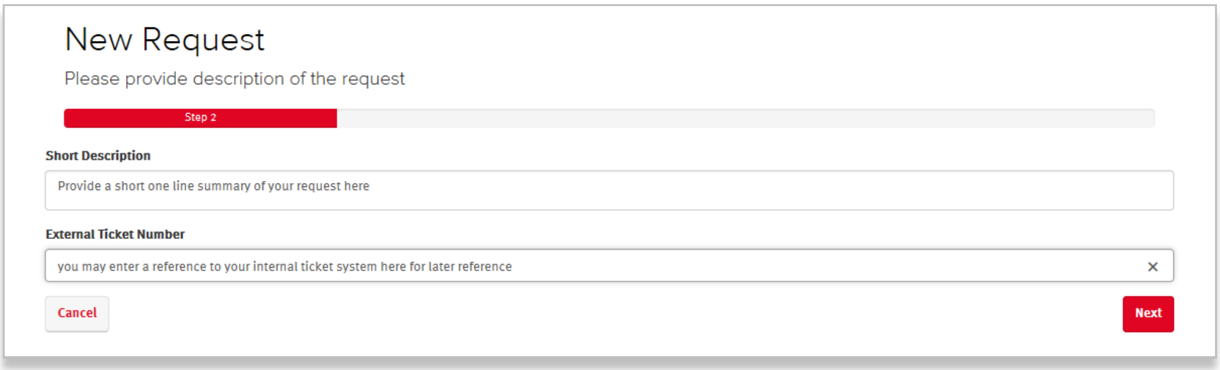
You will receive a confirmation email that your request has been registered and the summary of your request will be shown. (See Picture 19).

The details of the available TABs, buttons and drop down boxes will be explained in the chapter "Incident request" on page 14.

10.4.1.3. Incident request

The Incident request wizard will guide you through the complex process.

10.4.1.3.1. Initiating the incident request

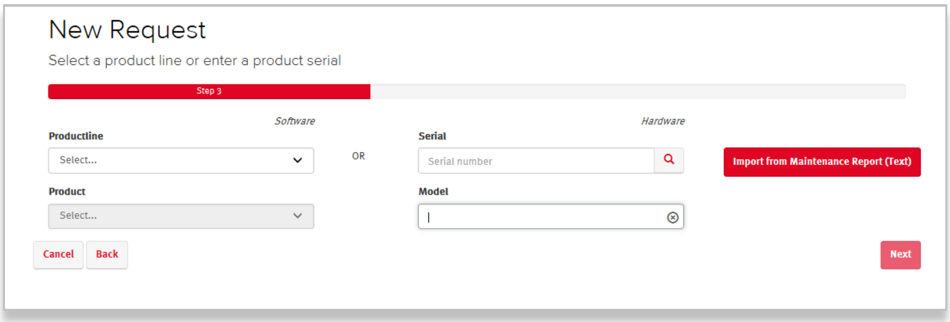


Picture 20

Please fill in the details as explained in Picture 20. The "External Ticket Number" is an optional field and is only for your convenience and later reference. To proceed, click on Next.

10.4.1.3.2. Selecting the product

The next step is to select the product. This can be either Software or a Hardware product. The wizard will skip the forms that do not match your selected product. However in this document all forms will be shown and described.



Picture 21

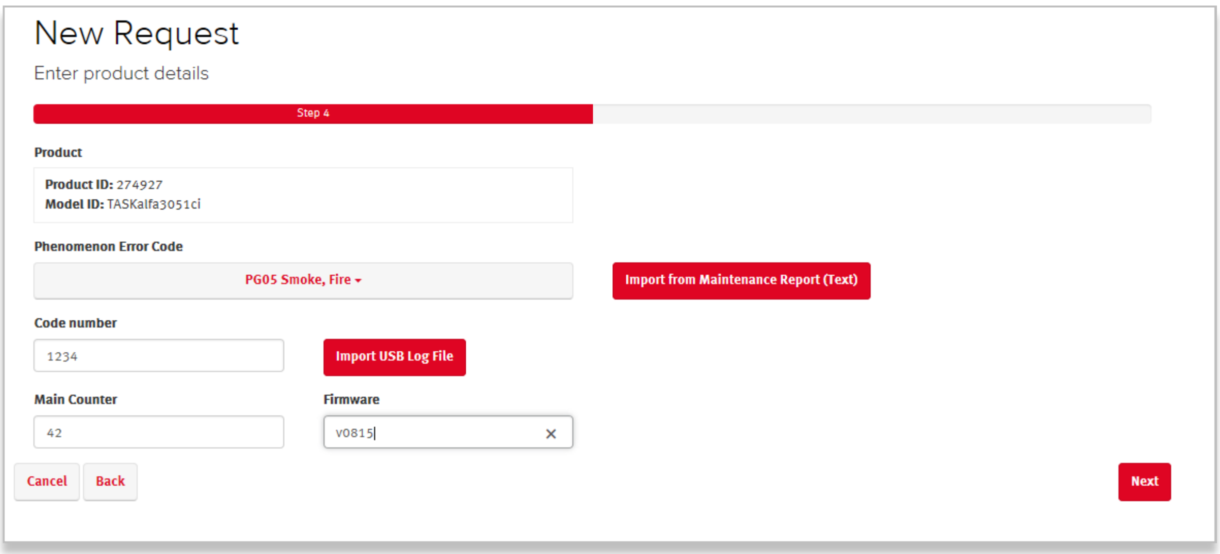
To select a Software product please click in the "Productline" drop down box to select the area of the software then click in product and select the correct product.

To select a hardware product you can either provide the serial number (recommended) or at least the exact Model name. If you click on the magnifying glass a new search form will open (See Picture 18) that allows you easily find the product. If you enter the serial number manually the Model will be filled in automatically by the system. This way you are immediately able to verify that you entered the correct value.
If you want to add the Maintenance report you can click on the "Import from maintenance report" button and upload this file to the system. Currently the Maintenance report is not automatically parsed by the system.
Click on next to proceed.

10.4.1.3.3. Enter product details

Depending on your previous choice you may have to enter more details regarding your product.

10.4.1.3.3.1. Hardware



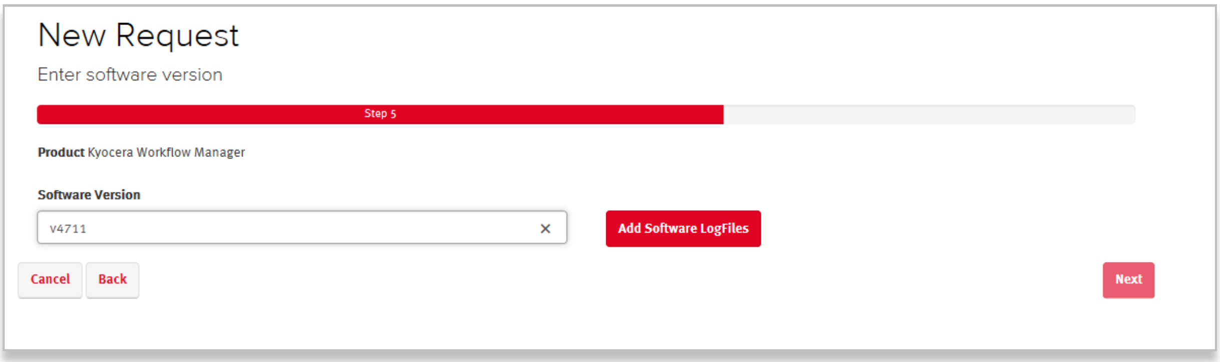
Picture 22

For Hardware we need all fields to be filled in. We recommend uploading the USB log file (U964) to the request as well, as it may contain important information for supporting you with your request. In case you do not have the USB log at hands, please add the maintenance report or a status page at least. If you skip uploading the file here, our Service Desk may ask you later on to provide the file, which will slow down the processing speed of your request.

When all data is provided click on next to proceed.

10.4.1.3.3.2. Software

For Software you have at least to provide the correct version of the software for processing your request. Frequently used software products offer log files that hold details on events and errors. It is recommended to upload these files now by clicking on the "Add Software Logfiles" button. If you skip uploading the file here, our Service Desk may ask you later on to provide the file, which will slow down the processing speed of your request.

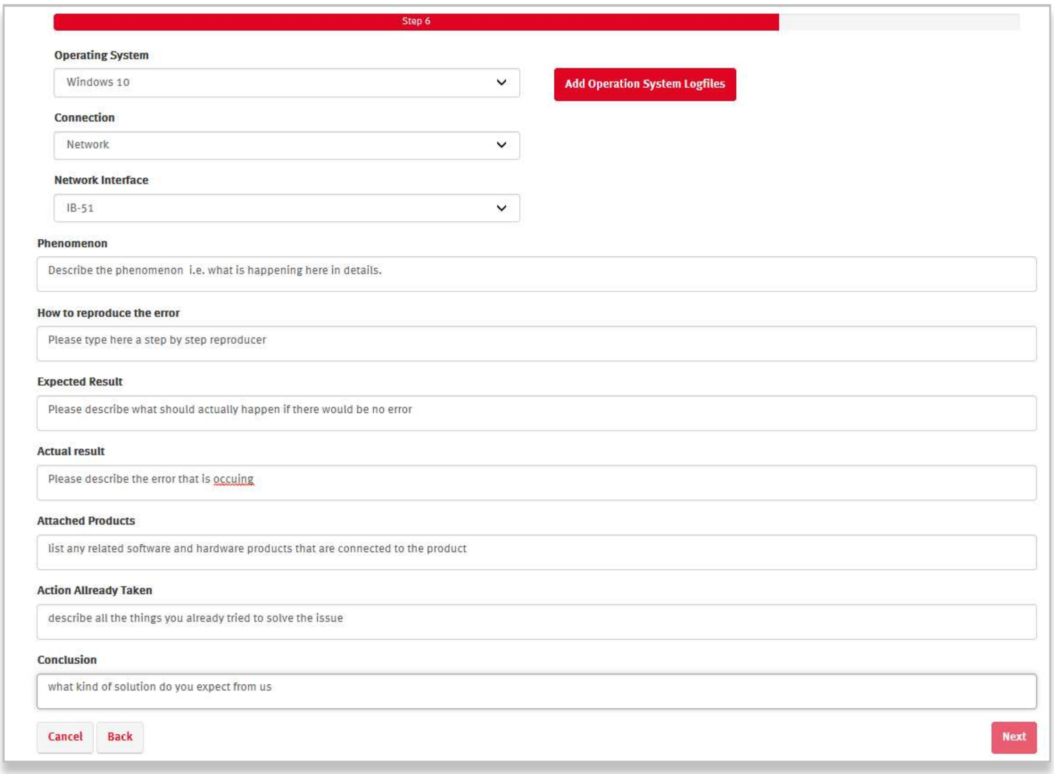


Picture 23

When all data is provided click on next to proceed.

10.4.1.3.4. Error and environment details

Please use the form shown in Picture 24 to describe the error and the environment as detailed and precise as possible. If the error is also visible in the Windows event log, we recommend uploading the Operating System Log files here. Please check the picture for the content of the individual fields.

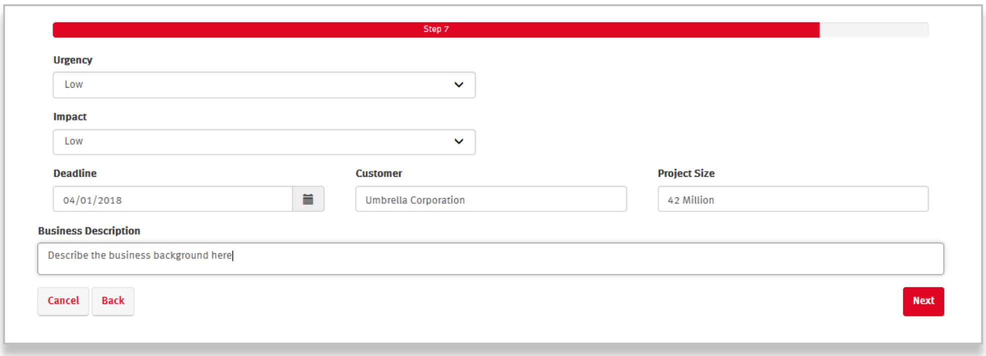


Picture 24

When all data has been entered click on Next to proceed.

10.4.1.3.5. Business information

By default the Urgency and Impact of all request is set to low. In this case all fields are optional. If you set either or both values to high, all fields in this form are mandatory.



Picture 25

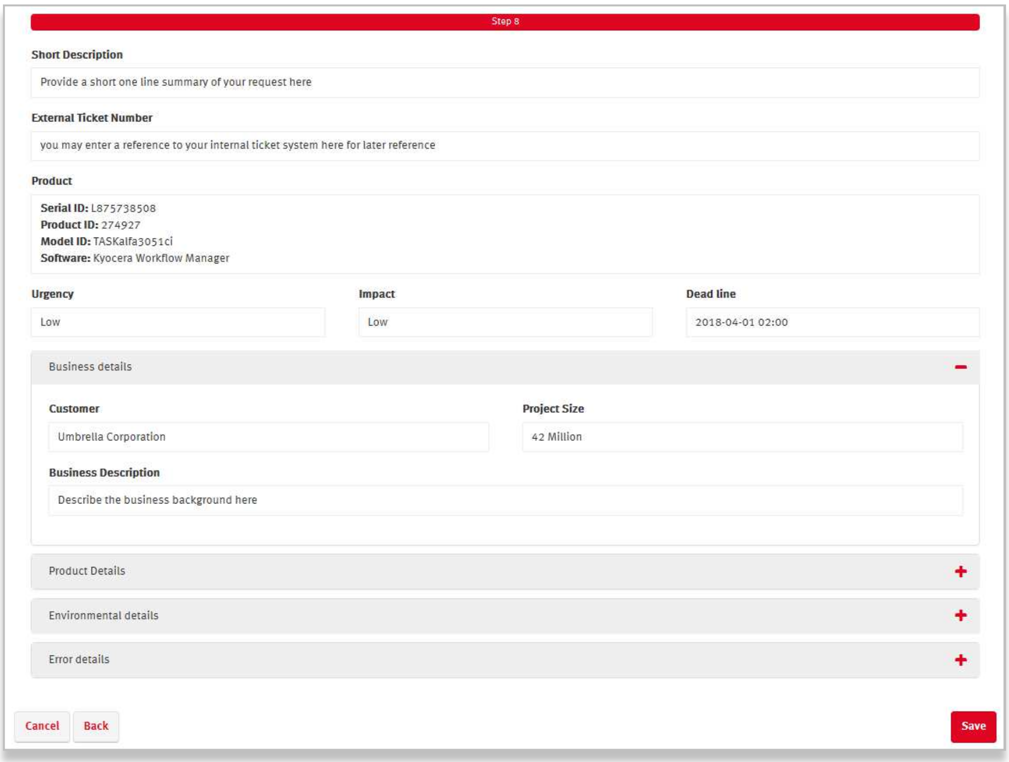
Please be aware that providing accurate details here may improve the processing speed of your request. For details on the required fields, please check the description provided in Picture 25.

Once all details have been provided click on next to proceed.

10.4.1.3.6. Request summary

Now you have almost finalized the request creation wizard. In this last step all details are shown to you (See Picture 26). To see the details of the individual section click on the + sign to expand or the - sign to collapse the corresponding section.

If you find any errors, you can use the back button to go back to the respective form, correct the data and use the next button to return to the summary. All data is cached and using the next and back button will not lose any details.



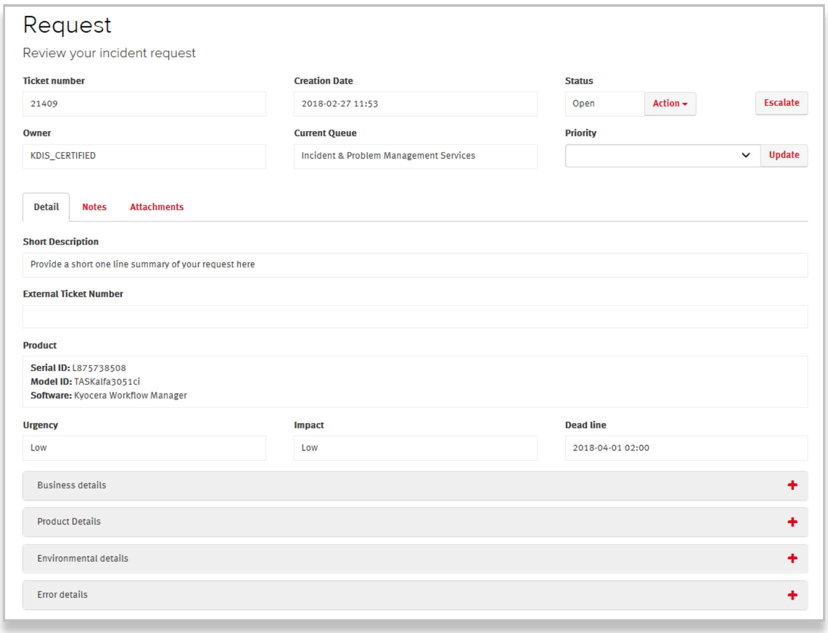
Picture 26

Once you have verified that all data entered is correct and complete click on 'Save' to finally register your incident request.

10.4.1.3.7. Request Confirmation

You will receive an automated email notification from the system that your request has been registered successfully.

Additionally a form (Picture 27) is shown to you providing a summary on all the details you have added to the request during Incident registration.



Picture 27

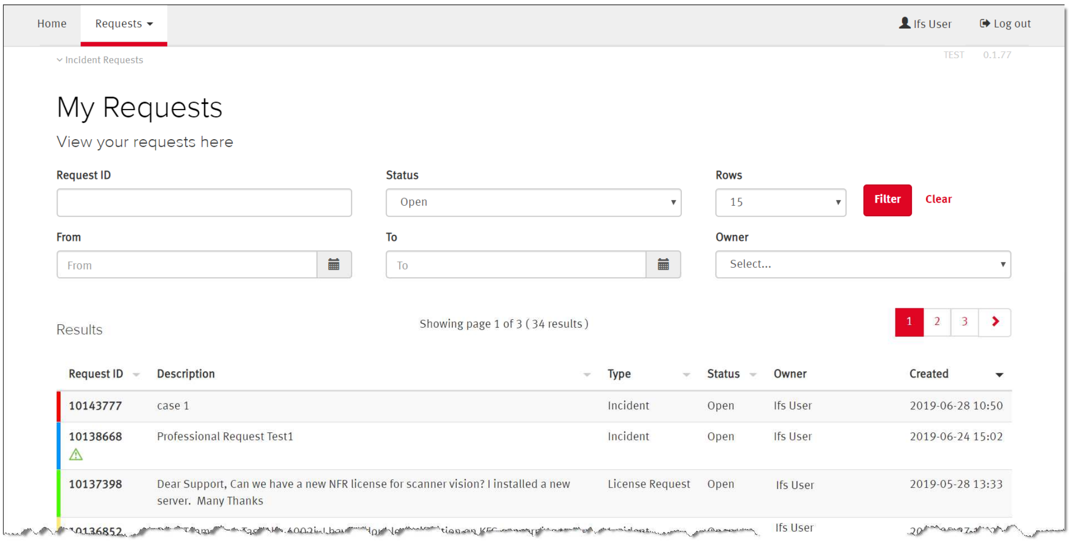
10.4.2. Managing existing Requests

The Portal offers you the possibility to easily find your existing requests and manage them. All features are explained in the following chapters.

Picture 28

To start managing your requests click on "requests" and then "My Requests" in the menu as shown in Picture 28.

You will get as a result a list similar to this:



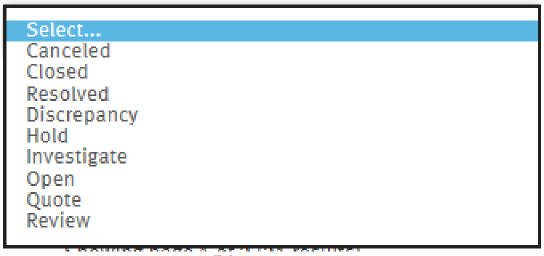
Picture 29

10.4.2.1. Filtering results

Please use the fields above the list to filter the results. The following filters are currently offered:

Request ID: Enter a complete ID here to directly go to that request

Status: You can filter by the status of the request. Please select one of the choices as shown in Picture 30.



Picture 30

From: Select the date. It will show all requests created starting from the selected date.

To: Select the date. It will show all requests created until that date.

Rows: The number of requests shown per result page.

Owner: The name of the user who ‘owns’ i.e. created the request. If this field is left empty, all requests from your company are shown.

10.4.2.2. Notification icons

The portal is using the following notification icons to indicate changes in content or status of a request in the overview: (more icons to be added)

The request has been escalated by the customer

The escalation is in progress by Kyocera [1]

The escalation has been resolved by Kyocera[2]

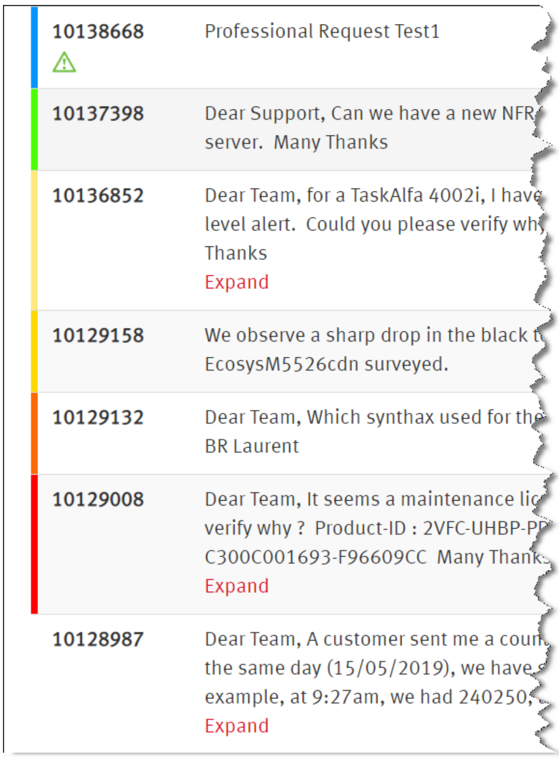
A new note / email is available for this request. [3]

New Note / Communication available for this request[4]

User has subscribed this request

10.4.2.3. Priorities

The request overview is supporting you to easily identify your most important and critical issues.



Picture 31

[1] This icon is shown for the following states: In progress, On hold, Cancelled, or no defined status.

[2] This icon is shown for the following states: Closed, Completed.

[3] The notification icon disappears only if the creator of the requests opens the request.
In case a subscriber opens the request, the icon does not disappear. Please be aware that it is not required to open the specific TAB in the request.

[4] The notification icon disappears only if the creator of the requests opens the request.
In case a subscriber opens the request, the icon does not disappear. Please be aware that it is not required to open the specific TAB in the request.

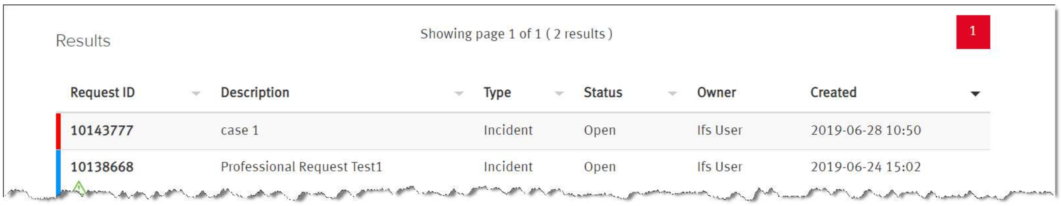
The coloured bar next to each request identifies its current priority and the colours have the following meaning:

Colour	Priority
White	Not set
Blue	Planning
Green	Low
Light Yellow	Medium
Yellow	High
Orange	Critical
Red	Major Incident

Table 1

10.4.2.4. Results overview - columns

The requests are shown as a table.



Picture 32

Request Id: The Request Id identifies your request. If you contact us by email, note or phone, please always share the request id with the service desk agent.
In this column you will also find the notification icons that are used to notify you about changed details.

Description: The description is a short overview of your request. It should help you identifying a request, if you do not know the request id.

Type: This identifies the type of your request. Currently the following types are supported: Incident, Warranty, Professional Service and License request.

Status: The status column informs you about the status of your request. I.e. you can easily detect, if a request is open, on hold, cancelled or closed.

Owner: In this column you will find the name of the person currently owning the request. I.e. it is the name of the person who created the request originally.

Created: This is the date and time when the request has been created.

You may sort your requests in ascending or descending order by clicking on any of the column headers. Sorting by ‘Owner’ is currently not possible. This may be added in the future.

10.4.2.5. Communication with the Service desk

To communicate with the Service desk, the portal is offering two possibilities.

a) Notes
b) Email

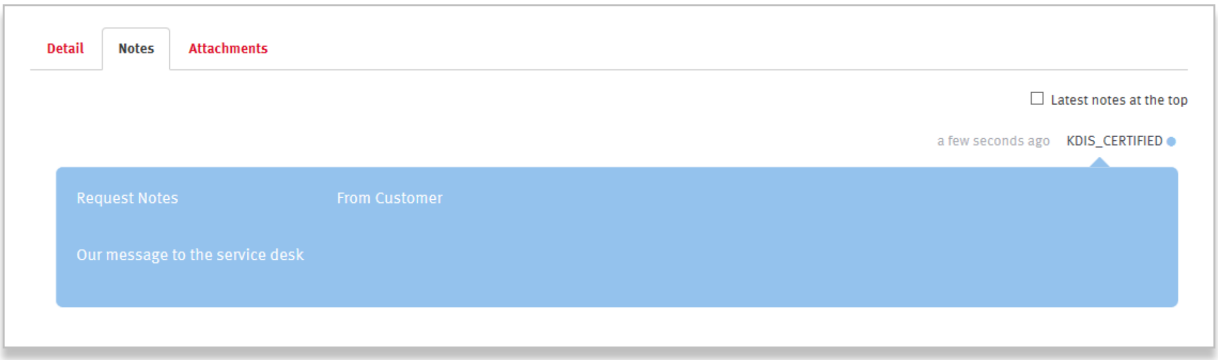
Both possibilities are explained in the following paragraphs in detail.

10.4.2.5.1. Notes

Using Notes is the preferred method for any communication. It is an integrated instant messaging system.

Picture 33

When a request has just been created the message thread is empty. To write a message, just type your text in the field as shown in Picture 33 and then click on "Add".



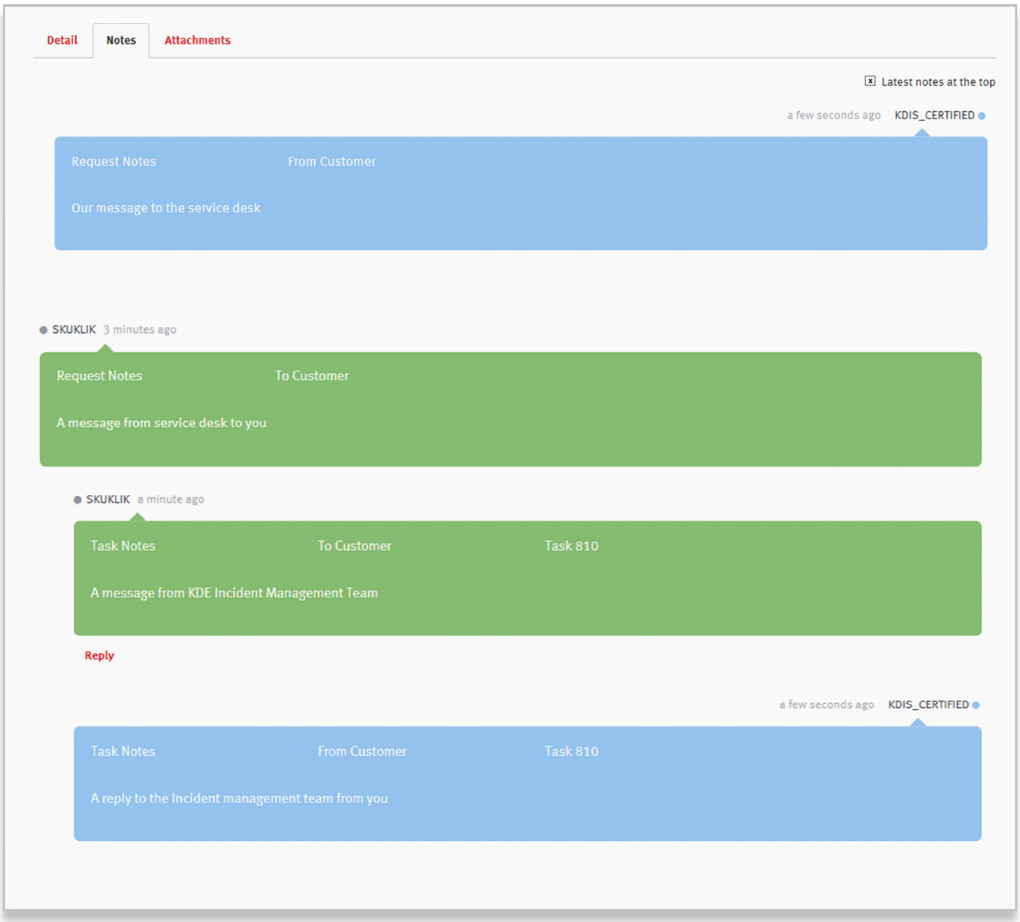
Picture 34

You will see the result immediately.

You can send as many message as you may need to this way. All of them will go to your request and can be read by the service desk and higher support levels as well. They are not sent to a specific person.

The same communication channel can be used by the Service desk or higher levels - in case the request has been escalated to a higher level - to send messages to you.

So if you have received messages from the Service desk or a higher level, you will see them in the notes tab as follows:



Picture 35

Please note the following conventions on the messages:

Blue: These are your messages to the Service desk or a higher level
Green: These are the messages you have received from the service desk or a higher level

By clicking on reply, you can respond to a specific message. If this is a message from a task, your note will go directly to the referenced task and the service desk owner will receive a notification about your new note.

10.4.2.5.2. Email

Service desk agents are able to send emails to you. And also the system may send emails to you. Usually emails sent by the system do not expect that you reply to them by email. They are intended to send out information only or notifications. In these cases the sender of the email will be DoNotReply@deu.kyocera.com.

Emails sent out by service desk agents may require an answer from your side. Please be careful when answering to these emails.
In the body you will find a text like this:

```
"[Please do not remove this line if you reply to this mail -
EMAIL_THREAD_ID[
KdOJVzeQdI0HL2nu6pxMQOhWjFARxHk91bsCyT7dycIg1S+18mb+zZLmTsjusj1qLC4fX5
cYZDF/DuTDWrQAZg==]  ]"
```

Picture 36

It is used by the system to identify the task or request where your answer will go.
Please do not remove this text from the answer.

And also do not change the reply-to. The standard sender will be ITSM-answer@deu.kyocera.com.
Only emails sent to this address and with a correct hash code similar to the example above will be processed properly. Incorrect ones will simply be discarded. This is to avoid spamming the system and protecting it from bots.

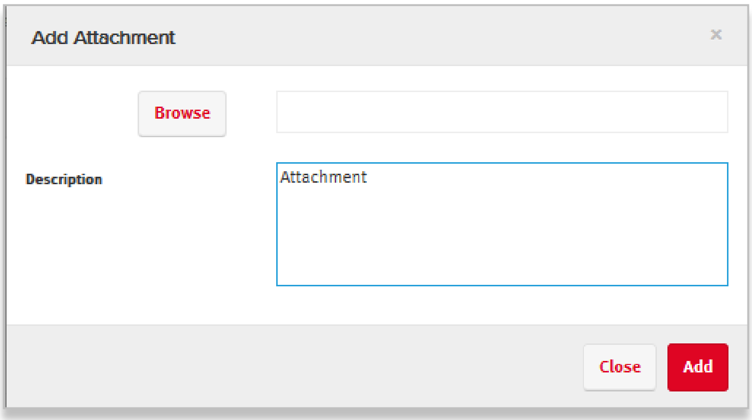
Standard method for communication should be using notes and attachments.

10.4.3. Adding attachments

You are able to add attachments to the system at any time after creating the request.

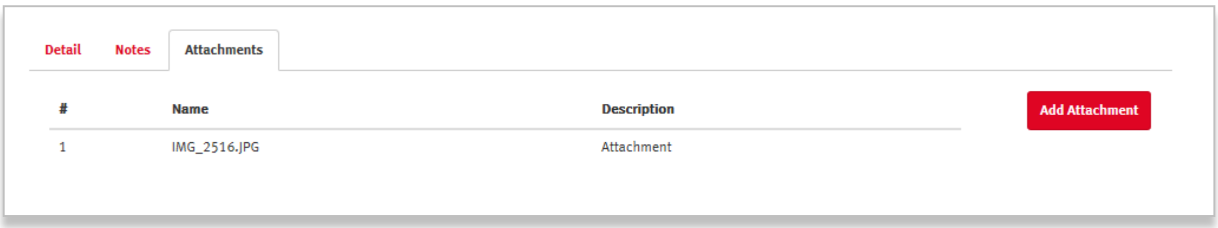
Picture 37

Just go to the request and open the Attachments TAB and click on 'Add Attachment'. A new dialog will open:



Picture 38

Click on browse and select the file you want to attach to the system. In the description please provide a description of the new file to be added. Store the file by clicking on 'Add'.



Picture 39

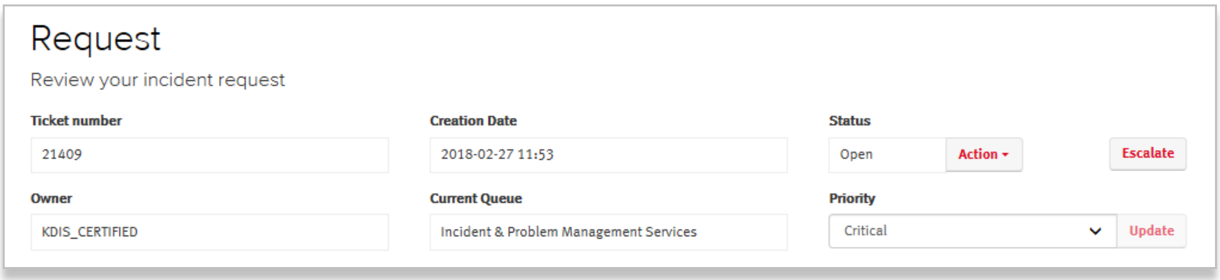
A successful upload will result in an updated list with your new file appearing in it.

If the service desk provides files for you, these will be shown here as well. By clicking on the name you can download the attachment locally.

Hint: In case you need to describe your request in details, using images or rich formatted text, it is highly recommended to use your standard office text writer application and add the document to the request. In the note you than may just add a simple reference to the attached document. The description field for the attachment may also be used for this purpose.

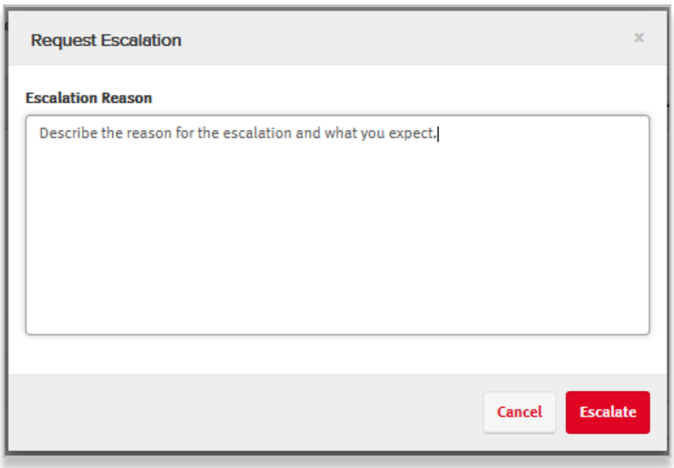
10.4.4. Hierarchical Escalations

Hierarchical Escalations are to be used very carefully only. Try to solve the issue using notes or emails to the request.
If you have the strong feeling that the request should be escalated hierarchically from the Service desk, meaning a message should be sent to the management, then use the hierarchical escalation functionality.



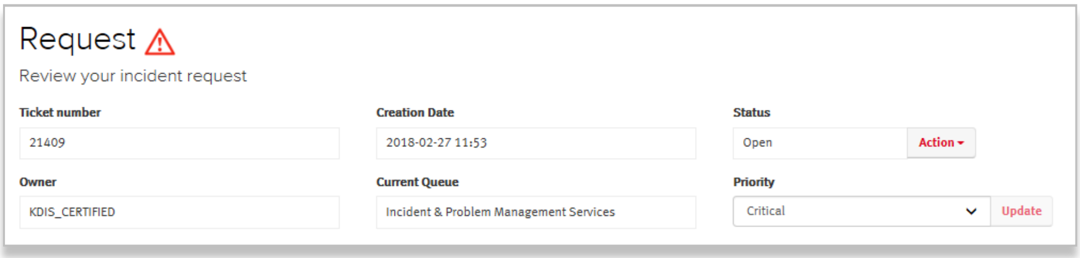
Picture 40

In the request just click on the "Escalate" button to initiate the escalation process:



Picture 41

Please give us an exact description why you started the escalation and what you do expect to happen in the field "Escalation Reason". Then click on "Escalate" to send out the escalation.

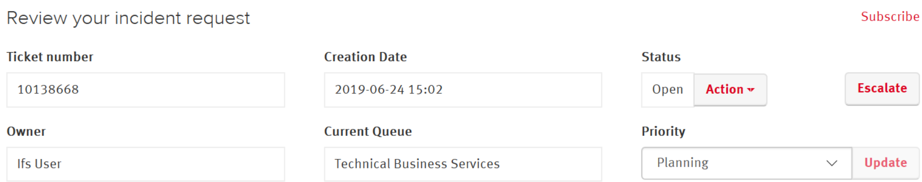


Picture 42

The escalation status is shown with an icon both in the request and in the overview.

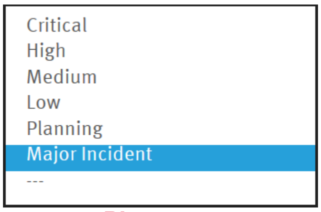
10.4.5. Changing the Request Priority

Usually the priority of a request is set during the creation process based on the facts valid at that time. As the conditions may change or new details are available it might be important to update the priority of a request. This can be either lowering or increasing the priority.



Picture 43

To change the priority of a request, just select the requests from the overview. In the top area of the request you will be presented with an overview of the most important summary details as shown in Picture 43. Please click in the drop-down-box 'Priority' to get a list of possible priorities.



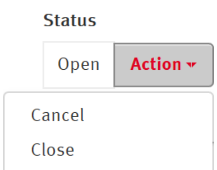
Picture 44

Once you have chosen the proper priority, click on 'Update'. By updating the priority a message will be sent to the Service Desk, to inform them about the status change.

Hint: It is highly recommended to write an additional note for explaining the background and reasons of the priority change.

10.4.6. Updating the Request Status

Similar to the priority change, there might be reasons for changing the status of a request. When clicking on the 'Action' button (See Picture 43) you will be presented the following options:



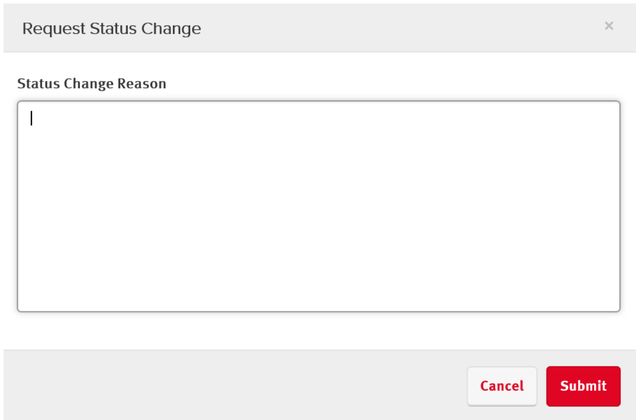
Picture 45

Please select the appropriate option and proceed.

In cases, where the request has been completed on our side, this is usually the case when we have provided a solution or workaround to you, you may reopen the request.

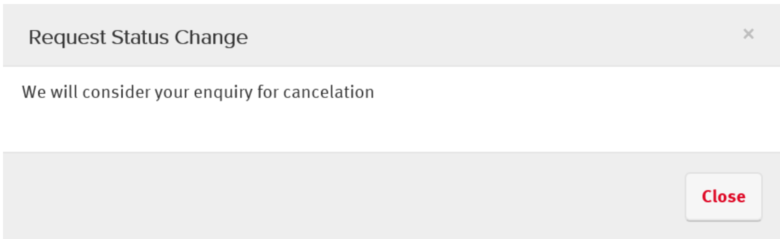
Picture 46

For those requests the Status field looks slightly different and you may just click on ‘Reopen’.
In both scenarios you should continue with filling in the ‘Status Change Reason”:



Picture 47

The more details you provide, the easier it is for the Service Desk Agents to understand the background and reasons for the status change request. When done click on ‘Submit’.

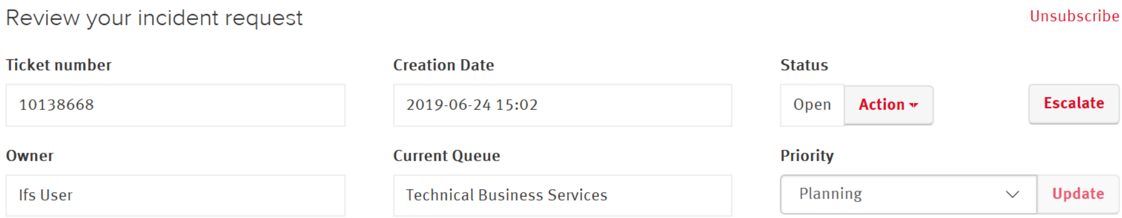


Picture 48

10.4.7. Subscribing to Requests

It might be necessary on your side to take care of requests that you did not initially create. For those requests you will not receive notifications on updates and changes by default. For receiving those notifications you have to ‘Subscribe’ to a request. To do so, just open the appropriate request and click on ‘Subscribe’ (Please see Picture 43).

Once subscribed, you will be informed about your subscription status each time you open the request. By clicking on ‘Unsubscribe’ you may change this any time needed.



Picture 49

Hint: Even as the original creator you may unsubscribe from a request. But please be very careful doing this. If you are the only subscriber for a request and then unsubscribe, no notifications will be sent out any more, until somebody subscribes to the request. It is solemnly your responsibility to monitor updates manually in this case. It is highly recommended that at least one engineer on your site is an active subscriber for a request.

11. SUPPORT ON USING THE PORTAL

If you encounter issues using the portal e.g. bugs, improvement ideas, etc. feel free to contact us.

We have specifically created an email mailbox for this purpose: sms.project@deu.kyocera.com.
Just sent us a notification and we will take care.

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14. APPENDIX

Availability

The portal is available 24/7. As tickets need to be handled manually these will be serviced and measured only during KDE BOG office times. These details can be reviewed in the respective SLA agreement and are not covered by this manual.