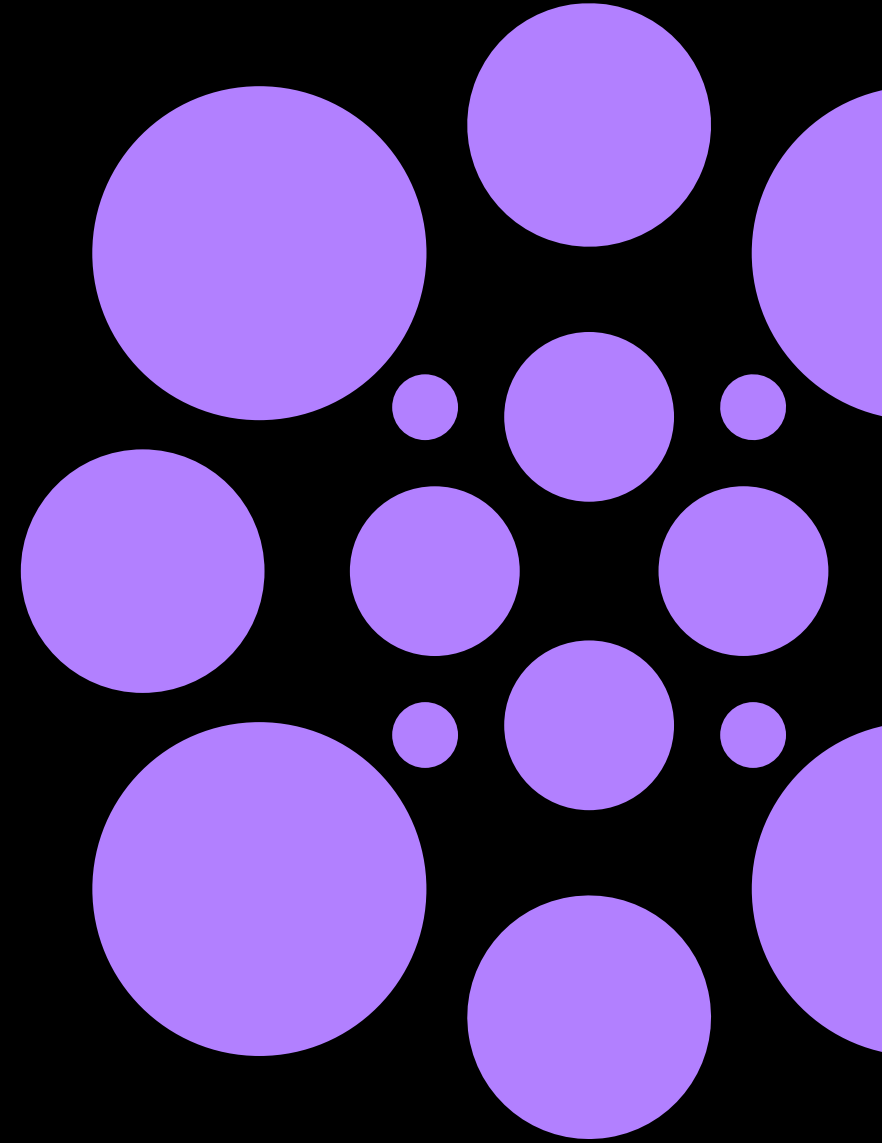


# NCRVoyix Support Hub Training Manual

Version: October 2022



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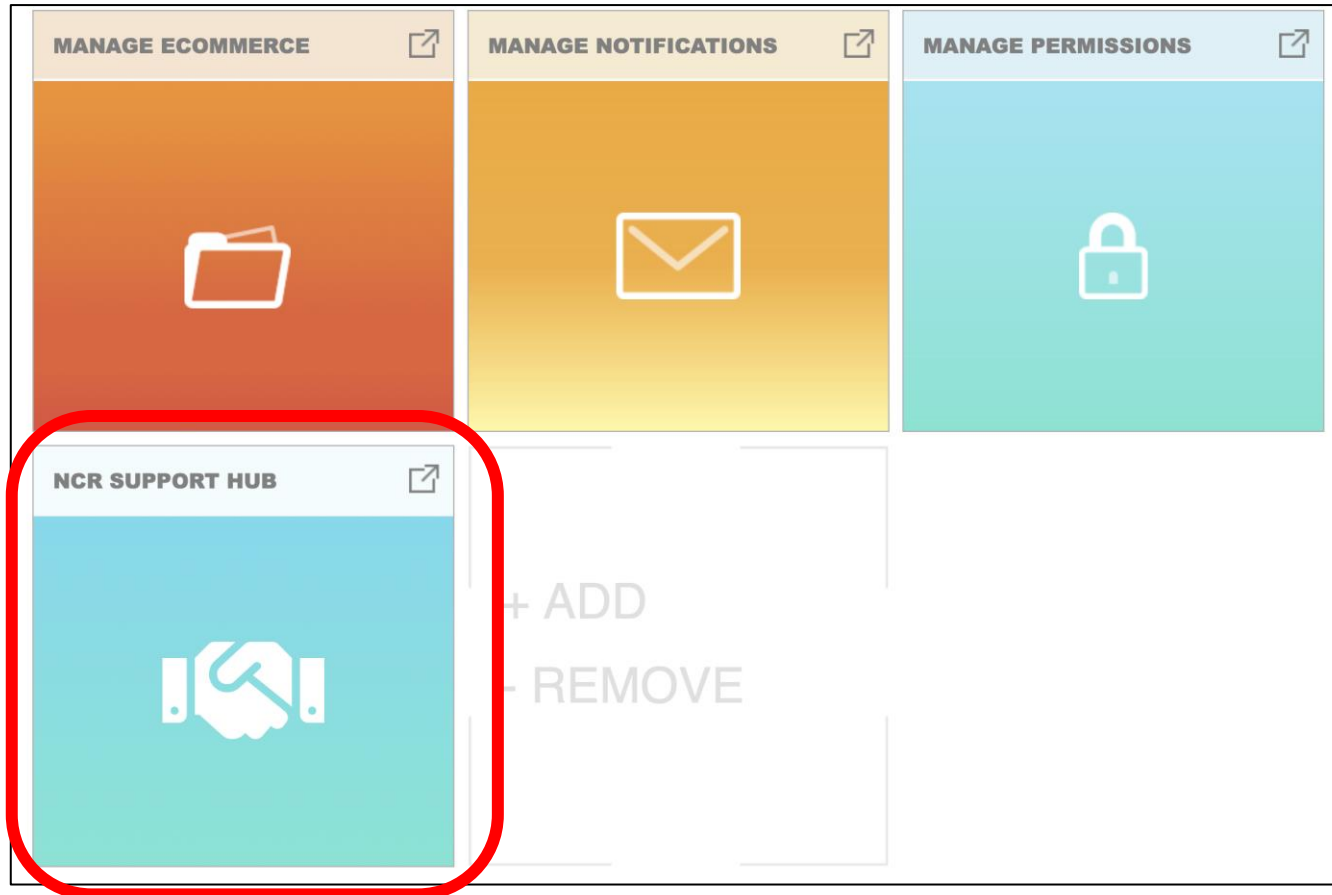
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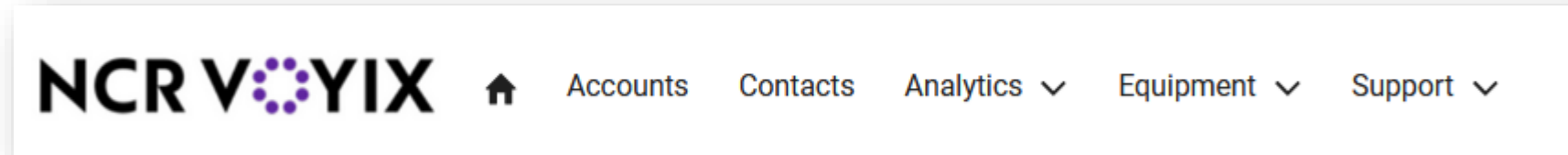
## How to access NCRVoyix Support Hub

- From the MyNCR Homepage, click on the square applet named, NCRVoyix Support Hub, under the Application tab:



## Menu Items

- Once you click on the NCRVoyix Support Hub applet, you will be redirected to the Homepage for the platform.



- In the page header, there are several navigation tabs:
  - *Home*: Home Page, select to navigate back to Home
  - *Cases*: Access and view your Cases, previously called 'Incidents'
  - *Accounts*: View and navigate to the Accounts you have access to
  - *Contacts*: View and navigate to the Contacts you have access to
  - *Work Orders*: Access your Work Orders, previously called 'Service Requests'
  - *Reports*: Access and download pre-created Reports
  - *Dashboards*: Visual representations of multiple reports available to filter and download
- These tabs offer distinct list views and page layouts containing relevant information based on the specific tab.

## NCRVoyix Support Hub Tile Options

The screenshot displays the NCR Voyix Support Hub interface. At the top left is the NCR VOYIX logo. To its right are navigation links: Home, Accounts, Contacts, Analytics, Equipment, and Support. A search bar is located to the right of the navigation links, and a user profile for Milos Bratic is visible in the top right corner. Below the navigation is a large banner image of a server in a white uniform serving a customer. Overlaid on the banner is a white text box with a domain change notice. Below the banner, three support tiles are visible: 'View Support Cases' with a list icon, 'Support Dashboard' with a funnel icon, and 'Create Case / Hardware Dispatch' with a document and pencil icon. A red rounded rectangle highlights these three tiles. Three red arrows point from the text 'Welcome Milos, how may we serve you?' to the three tiles. A note box on the right side of the tiles explains that the 'Create Case' tile may not be visible depending on permissions.

Due to the NCR company split, on Oct 16th, NCR Voyix' email domain changed from ncr.com to ncrvoyix.com for email coming FROM NCR Voyix. For phase 2, please start emailing us using ncrvoyix.com immediately (though there will be a TBD period where both domains will still work). Thanks for your support. Send questions or concerns regarding this domain change to Hospitality.SupportEnablement@ncrvoyix.com.

Welcome Milos,  
how may we serve you?

- View Support Cases
- Support Dashboard
- Create Case / Hardware Dispatch

*Note: Depending on your permission set, you may not see the 'Create Case' tile.*

## 1. View Cases

- Once this tile is selected, you will be directed to a 'Cases' list-view. **List Views** are filtered lists of data, and they are a quick and easy way to provide an overview and access to records.

**1. Select the dropdown** to view other available filtered lists.

**2. Use the Search Bar** to search for a record within the List.

**3. Select any column header** to sort by that field.

The screenshot shows a user interface for viewing cases. At the top left, there is a yellow folder icon and the text 'Case Portal Only - All Open Cases' with a dropdown arrow and a refresh icon. A purple box with the number '1' is positioned over this dropdown arrow. To the right, there is a search bar with the placeholder text 'Search this list...' and a settings gear icon. A purple box with the number '2' is positioned over the search bar. Below the search bar, there is a status bar with the text '50+ items • Sorted by Case Number • Filtered by All case - Status, Case Record Type • Updated a few seconds ago'. At the bottom, there is a table header with several columns: 'Ca...' (with an up/down arrow), 'Contact Name', 'Date/Time Ope...', 'Subject', 'Status', 'Priority', 'Mast...', 'Site Name', and 'Support Queue'. A purple box with the number '3' is positioned over the 'Ca...' column header.

## 1. Case Page Layout

- When you select a specific 'Case Number,' the Case's page layout will open.

1. **Highlights Panel** contains frequently referenced information about a record.
2. **Case Detail** contains all available Case information
3. **Chatter** is a collaboration tool used to communicate with NCRVoyix on Cases
4. **Related** contains related Files and Work Orders
5. **Action Buttons:** Edit the record or Follow to receive alerts on key record changes

The screenshot displays the NCR Voyix Case Page Layout with five numbered callouts:

- 1**: Highlights Panel (Case Number, Priority, Status, Date/Time Opened, Date/Time Closed)
- 2**: Case Detail (Case Owner, Case Number, Contact Name, Account Name, Contact Phone, Contact Email, Software Product, Other Software Product)
- 3**: Chatter (Chatter, Related)
- 4**: Related (Attached file(s), Upload Files, Or drop files, I am not providing any personally identifiable information in the above documents, Confirm)
- 5**: Action Buttons (+ Follow)

The Case Number is 00381772, Priority is Minor, Status is In Progress, Date/Time Opened is 7/22/2022 1:22 PM, and Date/Time Closed is blank. The Case Owner is John Doe, Case Number is 00381772, Contact Name is John Doe, Account Name is 1234 LLC, Contact Phone is 123, Contact Email is blank, Software Product is blank, and Other Software Product is blank.

## 2. Cases Dashboard

- Once this tile is selected, you will be directed to a 'Dashboard' list-view. Make your way down the side-panel to the 'Shared with Me' button.

1. Select the 'Shared with Me' button to view shared dashboards.
2. Navigate to 'NCRVoyix Support Hub' folder to access templated dashboard(s).
3. Select 'Case Dashboard' to access the specific dashboard.

Dashboards Shared with Me

2 items

DASHBOARDS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Hospitality Dashboards	Soliday, Ashlea L	4/2/2012, 10:47 AM	Ricker, Tera	10/24/2012, 8:22 AM
Created by Me	NCR Support Hub	br185135	7/21/2022, 6:29 PM	br185135	7/21/2022, 6:29 PM

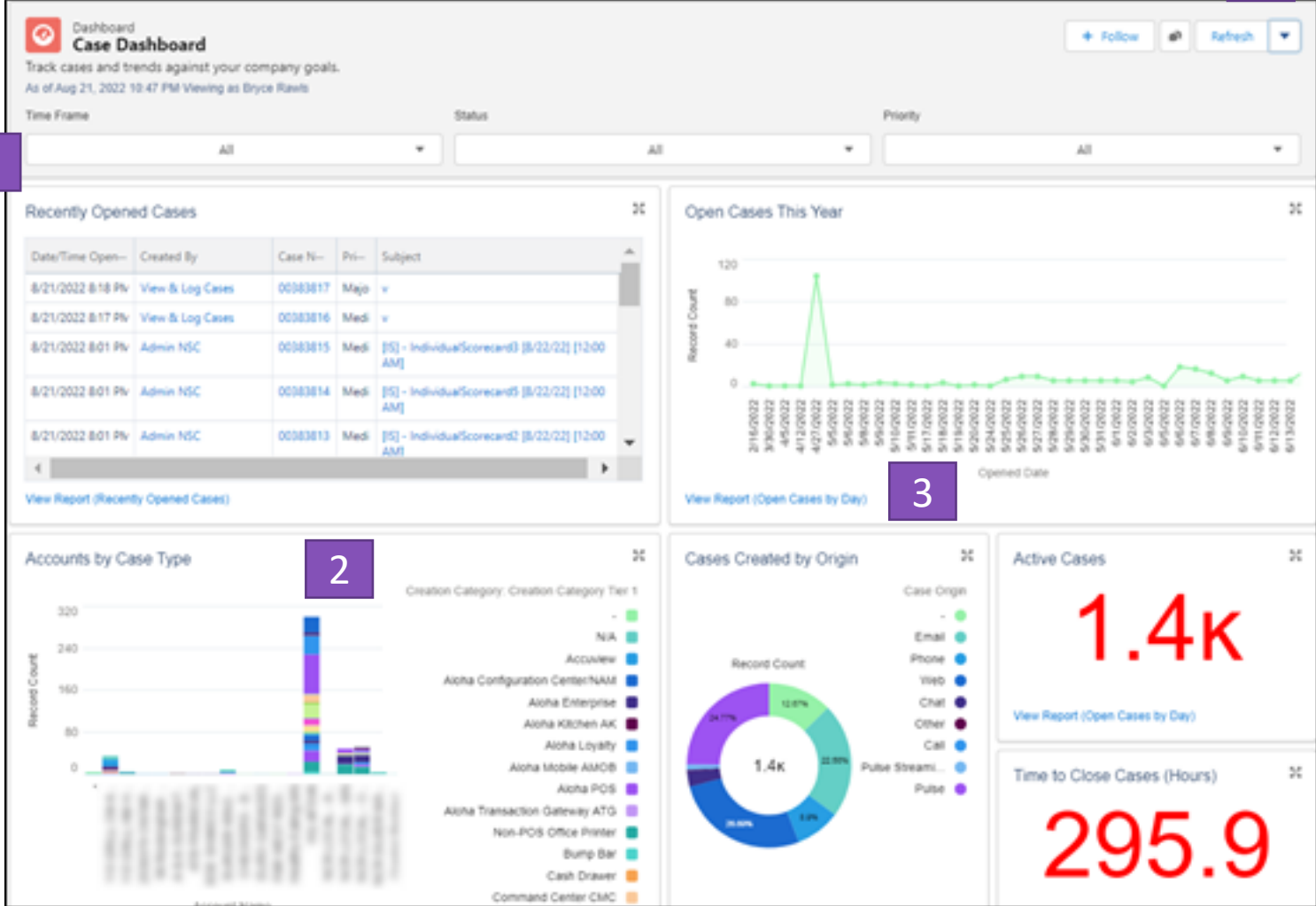
Name	Description	Folder
Case Dashboard	Track cases and trends against your company goals.	NCR Support Hub

## 2. Cases Dashboard

- When the 'Case Dashboard' is selected, a visual dashboard of up-to-date case information is displayed.

- Filters:** Select the drop-down to choose different values in each field to filter by.
- Report Widgets:** Access and view visually-created reports. These are highly interactive, where you can select a specific box, point, percentage, etc. on the graph/widget to dynamically open a filter-report.
- View Report:** Select this to view the raw-data with no dynamic-filter attached. These can also be viewed from the 'Reports' navigation tab.
- Refresh:** Click this to refresh the dashboard with updated Case information

4



1

2

3

Note: This image is displaying test data from an administrator-view

## 3. Create Case

- Once this tile is selected, you will be directed to the 'Case Creation Form.'

### Case Creation Form

*\*\*If you have a critical issue, please call your Help Desk for assistance instead of creating a case here.*

<p>* Site Name</p> <input type="text" value="Search Accounts..."/>	<p>* Priority</p> <input type="text" value="--None--"/>
<p>* Type</p> <p><input type="radio"/> Hardware</p> <p><input type="radio"/> Software</p>	<p>* Brief Description</p> <input type="text"/>
<p>Customer Ticket Number <span>i</span></p> <input type="text"/>	<p>* Problem Description</p> <input type="text"/>
	<p>* Do you have files to attach?</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>

*Note: This image may be subject to change*

## 3. Create a Hardware Case

1. Select the problem **Site** (searchable by City, MCN, Site Number, etc.)
2. Type equals **Hardware**
3. Select **No** for a **Hardware Dispatch** (Service Request)
4. Enter **Customer Ticket Number**
5. Enter **Priority**
6. Provide **Brief Description**
7. Provide **Problem Description**
8. For File Attachments select **Yes** or **No**
  - If **Yes**, a file-upload button will appear on the next window after selecting 'Create Case'
9. Click **Create Case**

**Case Creation Form**

*\*\*If you have a critical issue, please call your Help Desk for assistance instead of creating a case here.*

* Site Name <input type="text" value="1234 LLC"/>	* Priority <input type="text" value="--None--"/>
* Type <input checked="" type="radio"/> Hardware <input type="radio"/> Software	* Brief Description <input type="text"/>
* Is this a hardware dispatch (or work order)? <input type="text" value="No"/>	* Problem Description <input type="text"/>
Customer Ticket Number <input type="text"/>	* Do you have files to attach? <input type="radio"/> Yes <input type="radio"/> No

## 3. Create a Software Case

1. Select the problem **Site** (searchable by City, MCN, Site Number, etc.)
2. Type equals **Software**
3. Choose **Software** from drop-down
4. Enter **Customer Ticket Number**
5. Enter **Priority**
6. Provide **Brief Description**
7. Provide **Problem Description**
8. For File Attachments select **Yes** or **No**
  - If **Yes**, a file-upload button will appear on the next window after selecting 'Create Case'
9. Click **Create Case**

### Case Creation Form

*\*\*If you have a critical issue, please call your Help Desk for assistance instead of creating a case here.*

* Site Name 1234 LLC	* Priority Major
* Type <input type="radio"/> Hardware <input checked="" type="radio"/> Software	* Brief Description Software very slow
* Software Product Aloha Loyalty	* Problem Description It keeps freezing and slowing down when I pressed any button on the screen.
Customer Ticket Number 1234abcd	* Do you have files to attach? <input type="radio"/> Yes <input checked="" type="radio"/> No

Create Case

## 4. Create a Work Order (Service Request)

1. Select the problem **Site** (searchable by City, MCN, Site Number, etc.)
2. Type equals **Hardware**
3. Select **Yes** for a **Hardware Dispatch** (Service Request)
4. Enter **Customer Ticket Number**
5. Enter **Priority**
6. Provide **Brief Description**
7. Provide **Problem Description**
8. For File Attachments select **Yes** or **No**
  - If **Yes**, a file-upload button will appear on the next window after selecting 'Create Case'
9. Click **Create Case**

**Case Creation Form**

*\*\*If you have a critical issue, please call your Help Desk for assistance instead of creating a case here.*

<p>* Site Name 1234 LLC</p>	<p>* Priority P3 - Medium</p>
<p>* Type <input checked="" type="radio"/> Hardware <input type="radio"/> Software</p>	<p>* Brief Description Terminal not working</p>
<p>* Is this a hardware dispatch (or work order)? Yes</p>	<p>* Problem Description Issue with the screen, very slow making transactions</p>
<p>Customer Ticket Number 1234abcd</p>	<p>* Do you have files to attach? <input type="radio"/> Yes <input checked="" type="radio"/> No</p>

[Create Case](#)

**Note:** The ability to create a work order is granted based on specific permission sets. This process may not apply to you.

## 4. Create a Work Order: Step 1

Once the Case has been created, you will go to a dispatch process:

1. **Asset Lookup:** Type in the Asset that you would like to create a Work Order/Dispatch for.

EC Case Create with Dispatch Option

Step 1: Review Case Details 0% Complete

▼ Incident Details

**Case Number:**  
00383818

**Account:**  
Food Enterprise

**Customer Site:**  
1234 LLC

**Customer Contact:**

\* Asset:

[Next](#)

## 4. Create a Work Order: Step 2

The next window involves selecting the serial number of the problem asset.

1. **Serial Number:** You may either select the drop-down for pre-populated serial numbers or you may override the drop by selecting **Yes** at the bubble switch and typing in your own serial number.

EC Case Create with Dispatch Option

Step 2: Select Serial Number 16% Complete

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[Incident Details](#)

Case Number: 00383818      Solution Set Id: 502941

Account: Food Enterprise

Customer Site: 1234 LLC

Customer Contact:

Asset: PID BKC OOS

[Serial Number](#)

You can select the serial number from existing serialized assets related to the same site account, or you can simply choose to manually insert the value.

Enter Override Serial Number  No

\* Serial Numbers (related assets)

-None-

[Previous](#) [Next](#)

## 4. Create a Work Order: Step 3

The next window involves selecting the service level agreement that you would like to proceed with.

1. **Service Level Agreement (SLA):** You will have the option to choose to override your current SLA or continue with it as you proceed with this Work Order request.
2. **Entitlement:** This defines whether the asset is New-for-New or Out-of-Scope.
  - **New-for-New (NFN):** Manufacturing shipped a new asset to a site, but it failed. The site has warranty and will receive a NEW replacement.
  - **Out-of-Scope (OOS):** The asset does not have any warranty and the customer will need to pay for a replacement.

EC Case Create with Dispatch Option

Step 3: Validate SLA 33% Complete

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▼ [Incident Details](#)

<p><b>Case Number:</b> 00383818</p> <p><b>Account:</b> Food Enterprise</p> <p><b>Customer Site:</b> 1234 LLC</p> <p><b>Customer Contact:</b></p> <p><b>Asset:</b> PID BKC OOS</p>	<p><b>Solution Set Id:</b> 502941</p> <p><b>Contractual SLA:</b> 1459</p>
---	---

2

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Request qualifies for *New for New* replacement. Select from below to proceed.

\* **Service Level Agreement (SLA):**

Override Contractual SLA to [5x9 NBD PO]  
 Continue with Current SLA [1459]

Previous
Next

1

## 4. Create a Work Order: Step 4

The next window involves providing additional details relating to the problem asset.

1. **Override Request Type:** Select the request type from the drop-down (**appears only if asset is neither NFN nor OOS**)
2. **Site Address:** You will have the option to choose to override your site address or stick with the one provided.
3. **HW Role:** Select the Hardware role that the asset provides.
4. **Config Details:** Select the Hardware role that the asset provides.
5. **Failure Reason:** Select the failure reason pertaining to the asset.
6. **Notes:** Add any additional details you would like the Support Agent to know.

The screenshot shows a web form with the following fields and callouts:

- 1** Override Request Type: A dropdown menu with "--None--" selected.
- 2** Site Address: A text input field with a greyed-out area.
- 2** Address Override: A toggle switch currently set to "No".
- 3** \* HW Role: A dropdown menu with "--None--" selected.
- 4** Config Details: A text input field with a small information icon.
- 5** \* Failure Reason: A dropdown menu with "--None--" selected.
- 6** Notes: A text area containing the word "Test".

At the bottom right of the form are "Previous" and "Next" buttons.

## 4. Create a Work Order: Step 5

- This window displays the summary of all the information that you have entered during the Dispatch Process.
- Please confirm to make sure you have entered all the details correctly.

Please review the following details. Next, a work order record will be created and an outbound request will be sent out to ES. The result of the outbound request will be shown on the next screen.

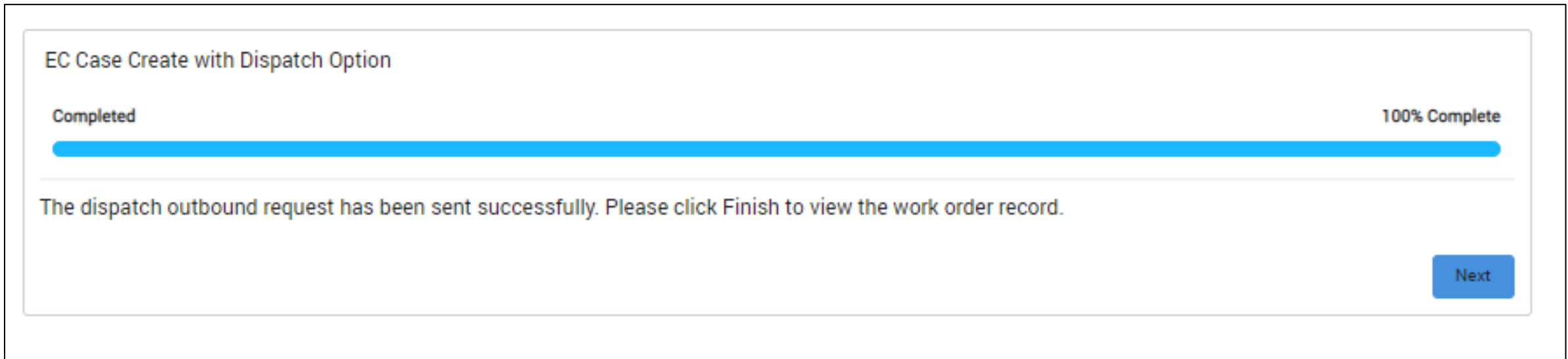
Account	BURGER KING BKC
Site	Food Enterprise
Case	1234 LLC 00383818
Asset	PID BKC OOS
Serial Number	121212
Contractual SLA	1459
Request Type	NEW FOR NEW
Shipment Method	Default
Failure Reason	Communication Error
Solution Set	
Config Details	
Is Out-of-Scope?	false
Address Override?	false
Notes	

The asset was overheating and making noises. This started to happen yesterday. This device doesn't seem to connect with the back of house devices.

[Previous](#) [Next](#)

## 4. Create a Work Order: Finish

Select 'Next' to finalize the Work Order process and view the newly-created record.



The screenshot displays a software interface for a process completion. At the top, the text "EC Case Create with Dispatch Option" is shown. Below this, a progress bar is labeled "Completed" on the left and "100% Complete" on the right. A solid blue bar indicates the progress is at 100%. Below the progress bar, a message states: "The dispatch outbound request has been sent successfully. Please click Finish to view the work order record." In the bottom right corner, there is a blue button labeled "Next".

Thank you

