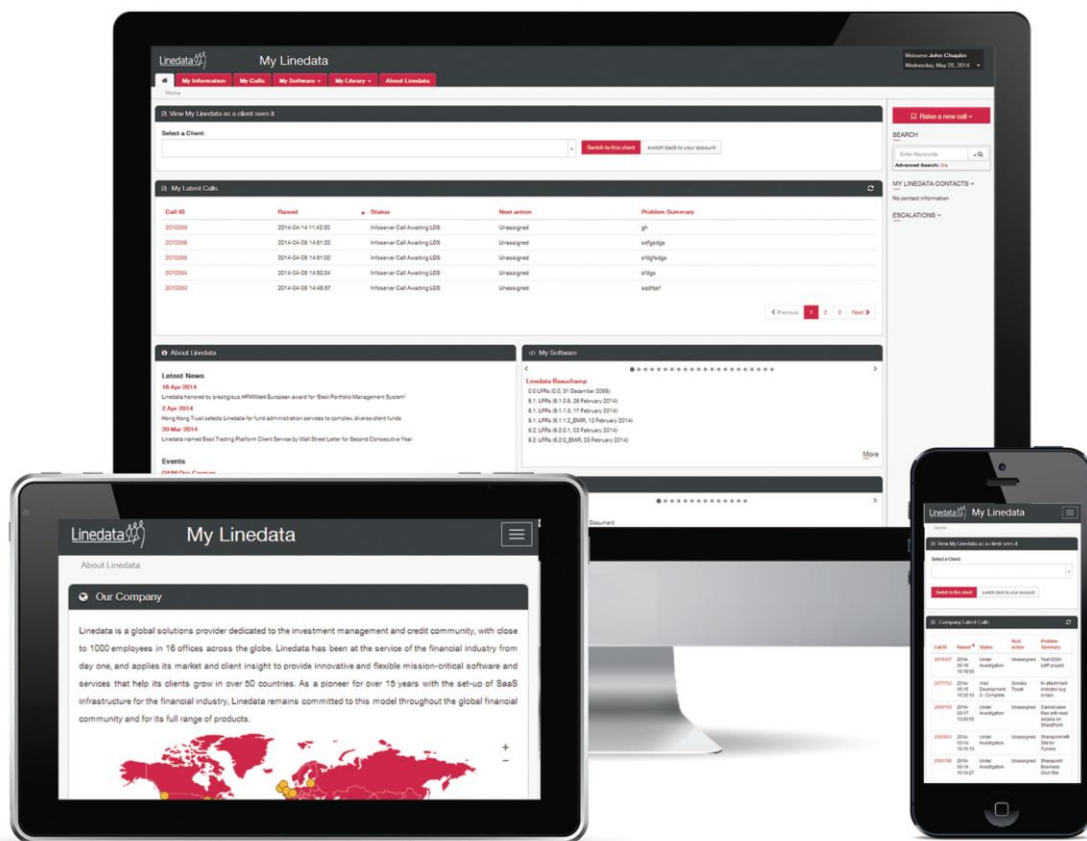# MY LINEDATA

360° VISION OF YOUR LINEDATA
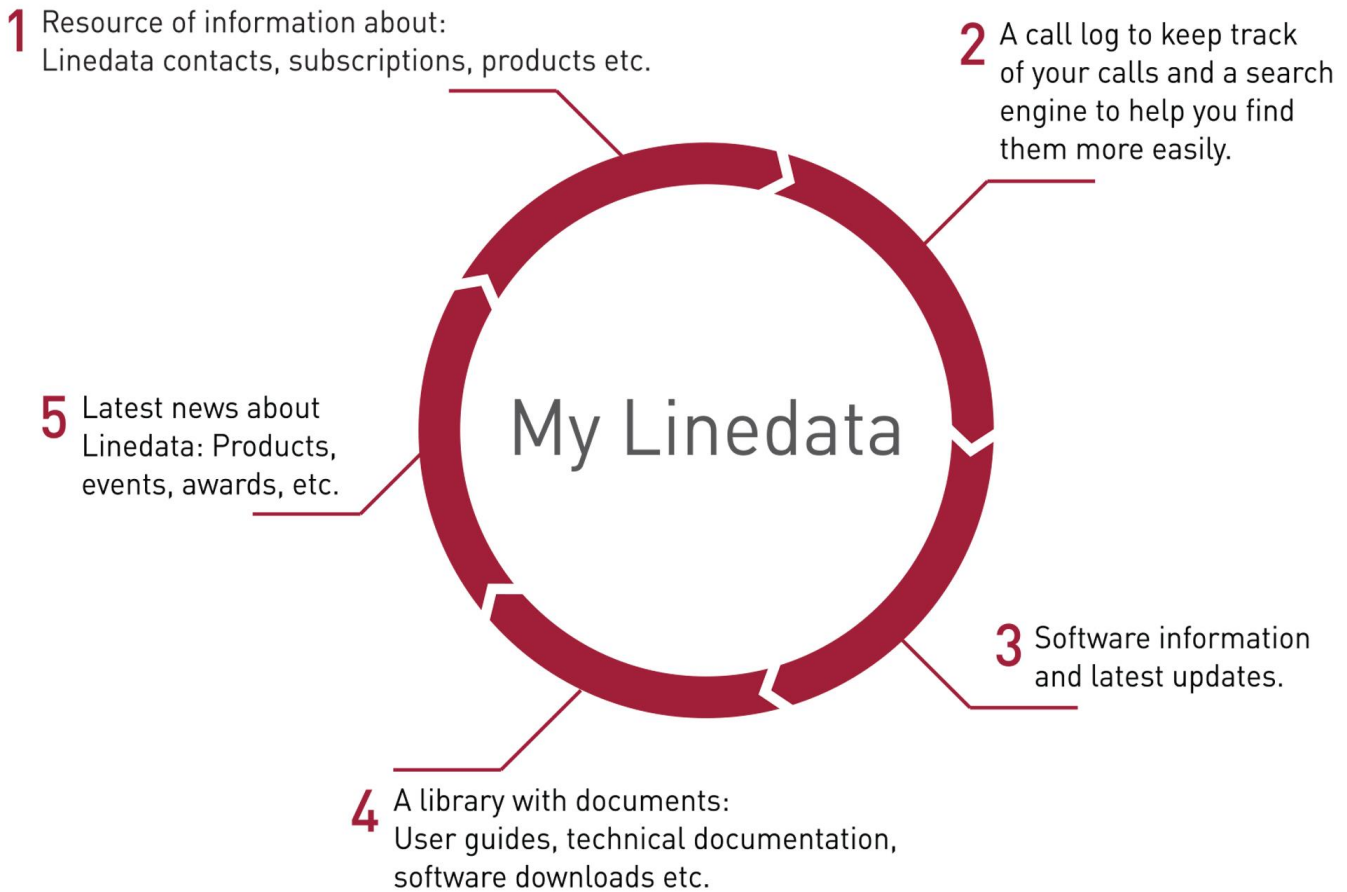
USER GUIDE

Linedata

TABLE OF CONTENTS

ONE PORTAL WITH ALL THE INFORMATION YOU NEED

My Linedata is the new generation of client web portal: **https://my.linedata.com**
You will find all the information you need through a unique web portal.

1 Resource of information about:
Linedata contacts, subscriptions, products etc.

2 A call log to keep track
of your calls and a search
engine to help you find
them more easily.

My Linedata

5 Latest news about
Linedata: Products,
events, awards, etc.

3 Software information
and latest updates.

4 A library with documents:
User guides, technical documentation,
software downloads etc.

1. COMPATIBILITY

https://my.linedata.com

My Linedata is compatible with:

- Internet Explorer 8 and above.
- Google Chrome 14 and above.
- Mozilla Firefox 9 and above.
- Opera 10 and above.
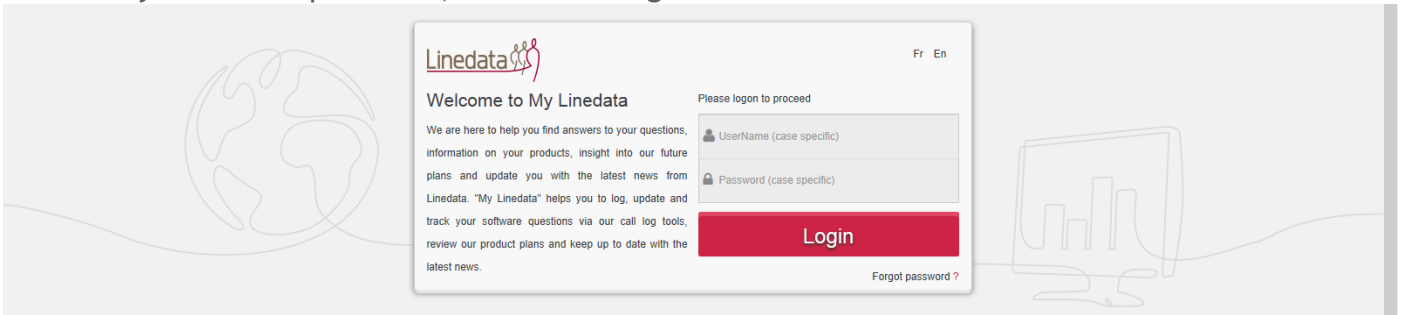- Apple Safari 4 and above.

My Linedata does not work with:

- Internet Explorer 6 and 7

2. MANAGE YOUR MY LINEDATA SESSION

2.1 Connect

To open a session:

- Enter URL https://my.linedata.com – or click on URL link.
  Enter your id and password, then click Login.

2.2 Manage your session: Renew – Log Out

A. Renew session

Reset countdown to 24 hours:

- Click button on top right next to your name.
- Display a new page.

B. Calendar

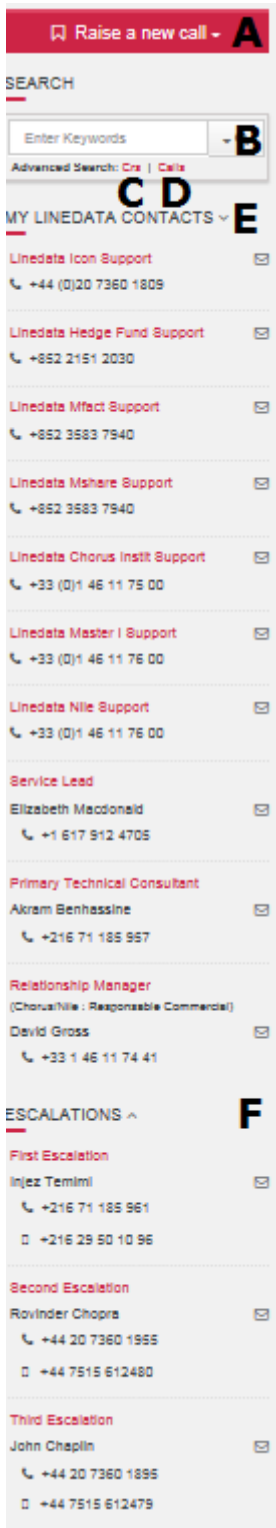Hover over the button to display current date.

C. Help

Click button to display/download the My Linedata User Guide.

D. Log Out

Close your session:

- Click the button on the top right of the page next to the current date.
- Shutdown your browser = Close all tabs and windows.
- Your connection closes automatically if your session is idle for 24 hours.

3. SIDEBAR

A. Raise a new call

Click **Raise a new call**, and select the product for which you have a request.

Please select Product **My Linedata** if you have a request about the My Linedata site.

B. SEARCH

Enter a Call or CR id or keywords and launch your query in Calls or CRs database.

The search engine searches all Calls or CRs, whether they are active or closed.

C. Advanced Search: Crs

Click **CRs** to display the CR detailed search form.

D. Advanced Search: Calls

Click **Calls** to display the Call detailed search form.

E. MY LINEDATA CONTACTS

1. Displays each of your Product Support Team's telephone numbers and email addresses.
2. Displays each of your Linedata dedicated Contacts telephone numbers and email addresses.
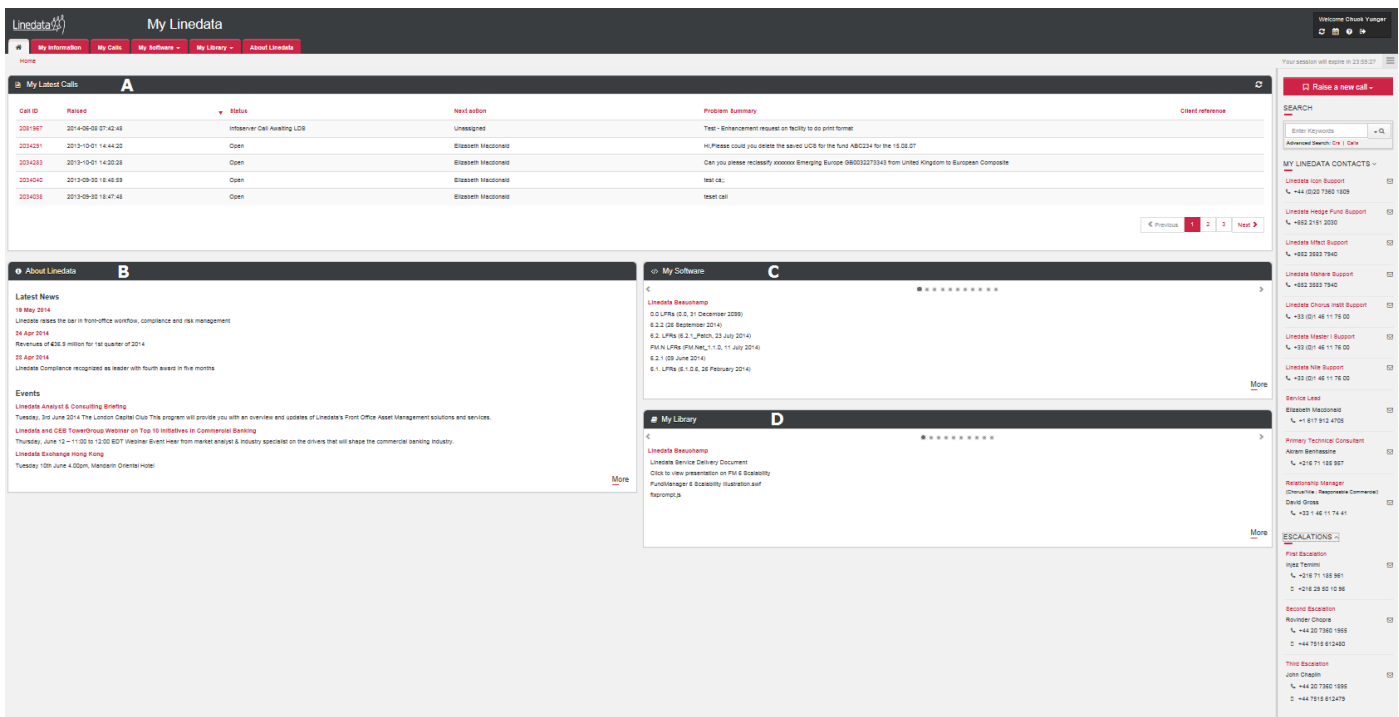
F. ESCALATIONS

Displays Linedata Managers of a Product Line who are in charge of resolving your requests outside the standard process of Call Log Management.

Escalation 1 = Initial level.

Escalation 2 = Intermediate level.

Escalation 3 = Maximum level.

4. MY HOMEPAGE

A. My Latest Calls

Displays your recently raised active Calls. If you currently have no active calls, My Linedata displays your Company's active calls.

B. About Linedata

1. Displays recent press releases.
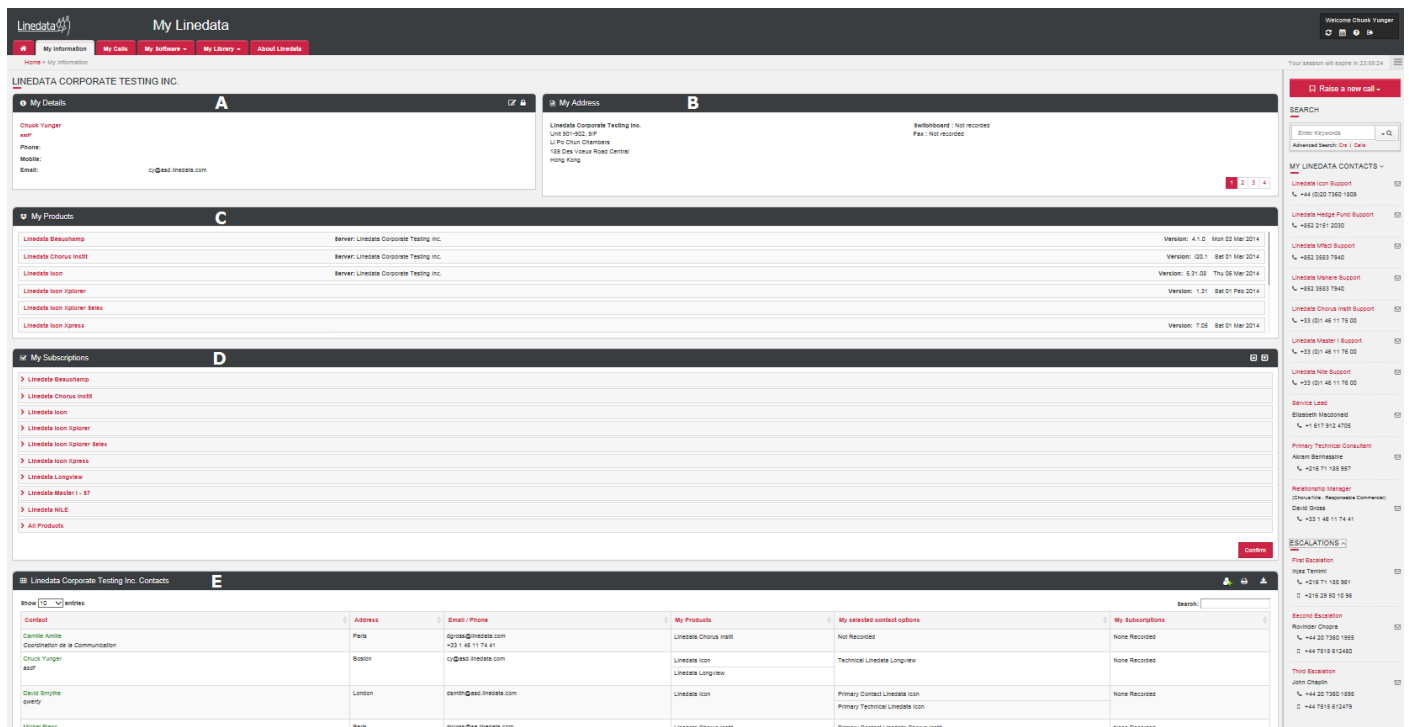2. Displays upcoming events organised byLinedata or in which Linedata takes part.

C. My Software

For each of your Linedata products, displays latest versions closed for release.

D. My Library

For each of your Linedata products, displays the latest published documentation.

5. MY INFORMATION

A. My Details

In the title banner, click on the corresponding button to:
- Edit Details
- Change Password

B. My Address

Displays your business address and possibly any other addresses of your Company's offices.

If you want to have an address updated, please contact Linedata.

C. My Products

Displays the product version used in Live area with its installation date.

Click on product name to display the version used in each of your areas.

If you want to have a Version or an Area updated, please contact Linedata.

D. My Subscriptions

For each of your Linedata products, you may subscribe to receive nightly email notifications that display which of your Calls and CRs have been processed in the past 24 hours.

1. Click on a Product to display its subscription list.
2. Check the box for each notification you are interested in, and click **Confirm**.

E. [My Company] Contacts

A **Contact whose name is displayed in green** has a My Linedata full access account, which includes the right to:

- Add a Contact to your Company
- Edit details of your Company Contacts
- Deactivate your Company Contacts
- Raise and update your Company Calls
- Subscribe to receive notifications about your Company Calls and Crs

A **Contact whose name is displayed in red** has a My Linedata account with read only rights.

A **Contact whose name is displayed in black** has no My Linedata account.

Please contact Linedata to obtain a My Linedata account or to update rights for one of your Company Contacts.

6. MY CALLS

A. Report of your Calls at an active status

Displays your currently active calls.

If you currently have no active calls, My Linedata displays your Company's active calls.

To view all active calls no matter who raised them, in the filter section above the report, in the third field from the left, select **Raised b**y.

In **Calls raised by** [.] tile, in title banner, click on corresponding button to:

- Format the report for print.
- Export the report as CSV = Download the report as file for Excel.

B. Filter Calls raised by year

Select a year to see all Calls raised by your Company during this year.

Report of calls in a given year shows all calls, whether they are in an active or closed status.
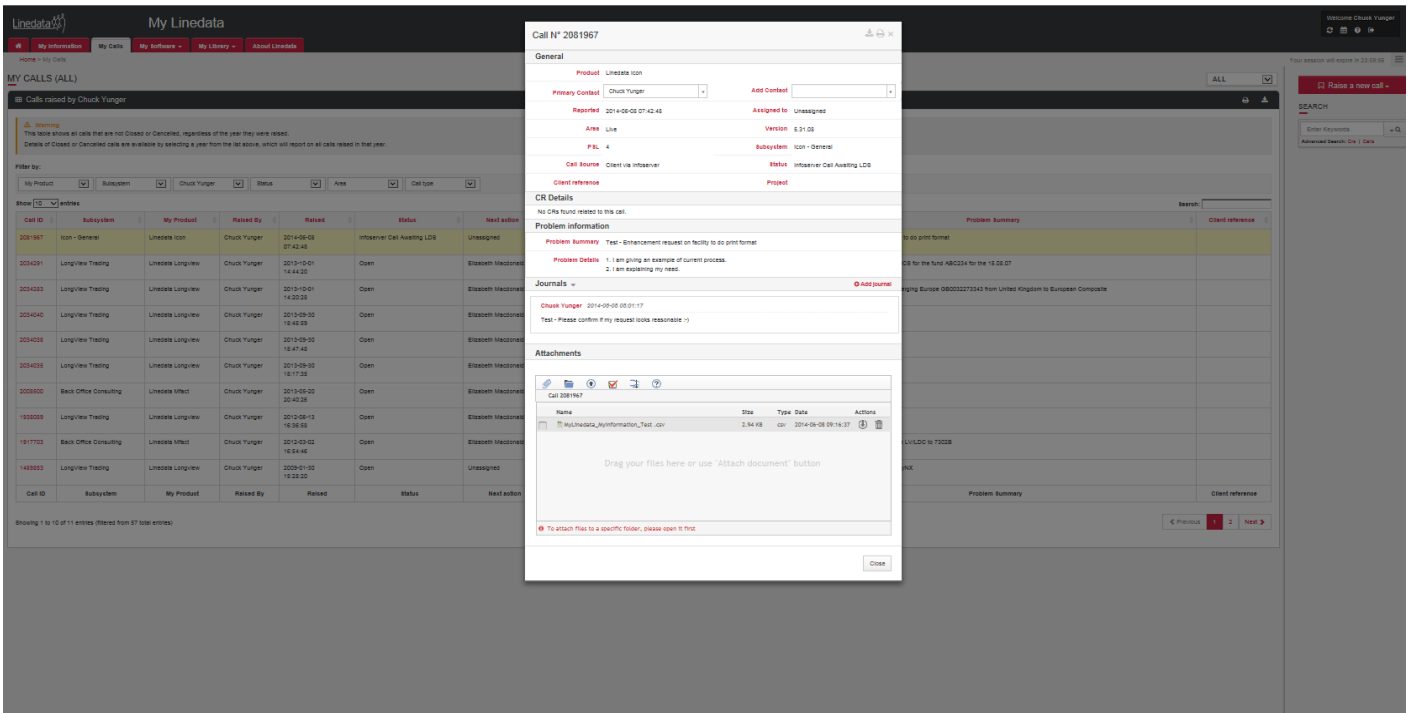
C. Search

Enter a Call id or keywords to launch your query in the Calls database.

The search engine will search for occurrences of entered keywords or Call id on all active Calls.
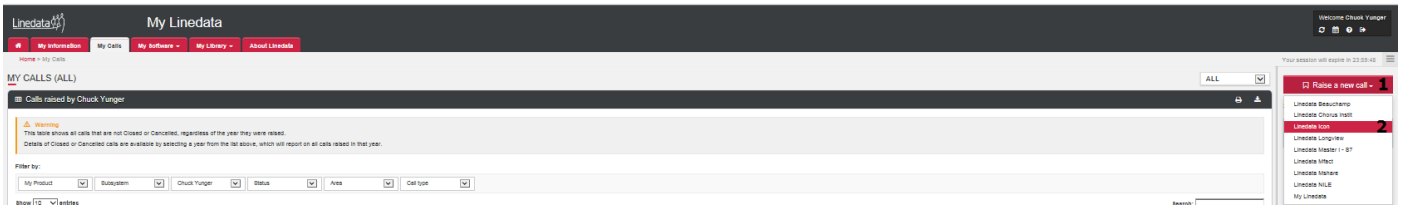
6.1 See a Call
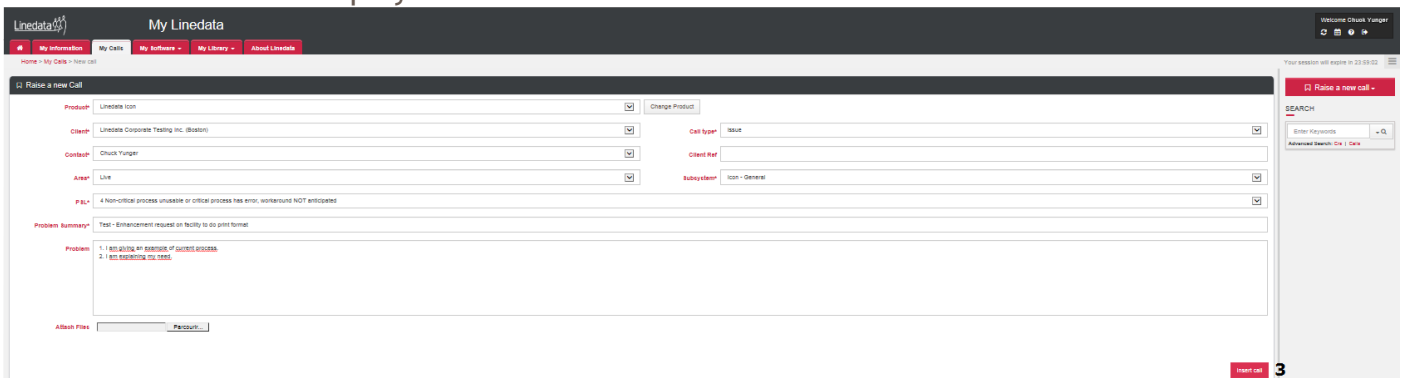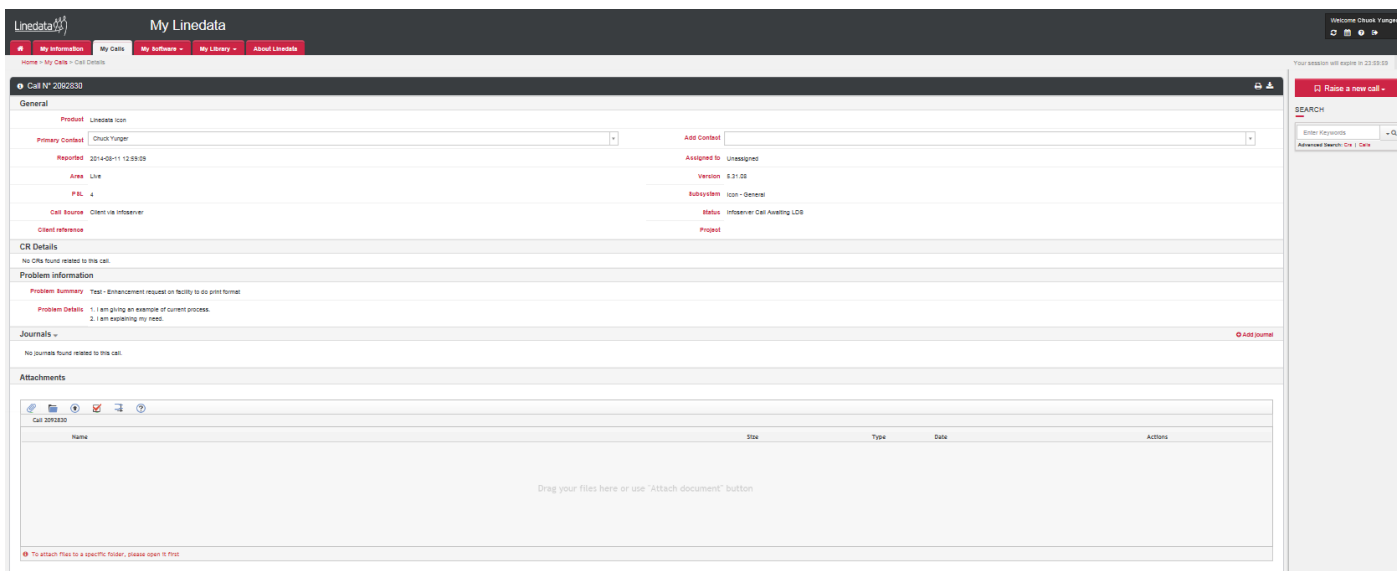
To display the details of a Call, click its Call id.

6.2 Raise a New Call

1. In sidebar, click **Raise a new call**.
2. Select Product to display the **Raise a new call form**.

3. Fill in the appropriate fields, and click **Insert Call**.

- Be informed in real time of call updates, just as is the call raiser
- A Call is recorded with a unique Linedata id number.
- An email notification is sent to the Call raiser.
- An email notification is sent to all members of the group in charge of Calls for your Company for the selected Product.
- The Call is visible on My Linedata.

6.3 Add a Contact in a Call

1. Open a Call detail form by clicking on its Call id number.
2. In **Add a Contact**, select one of your Company Contact names.

Adding one or more Contacts for your Company enables them to receive the same email notifications as the call raiser.

So, added Contacts may:

- Be informed in real time of call updates, just as is the call raiser
- Take action quickly on Call if the Call raiser is unavailable
- Respond instead of the Call raiser if necessary

Before selecting Company Contacts to add, please check if they are registered with their email address in **My Information**.

6.4 Add a Journal Entry in a Call

1. Open a Call detail form by clicking on its Call id number.
2. Click **Add a Journal**.
3. Enter appropriate information in free text field.
4. Click **Add New Journal**.

An email notification is sent to all members of the group in charge of Calls at your company for the selected product, or to the Linedata employee assigned to the Call.

When a Linedata member moves a Call to a status that requires a response from your company, a Journal is added to the call and an email is sent to your company's call contacts.

6.5 Upload a File to a Call

Attachments

Call 2081967

Name	Size	Type	Date	Actions

Drag your files here or use "Attach document" button

ℹ To attach files to a specific folder, please open it first

1. Open the Call detail form by clicking its Call id number.
2. In **Attachments** area, you may:
- Drag and Drop a File from your PC to the Attachment area.
- Click the **Paperclip** button to browse your PC for the file you want to attach.

An email notification is sent to all members of the group in charge of Calls at your company for the selected product, or to the Linedata employee assigned to the Call.

6.6 Delete a File that you have uploaded in a call

Attachments

Call 2081967

	Name	Size	Type	Date	Actions
☐	📄 MyLinedata_MyInformation_Test .csv		csv	2014-06-08 09:16:37	⊕ 🗑

1. Open Call detail form by clicking on its Call id number.
2. In the **Attachments** area, at the end of the row containing the file you want to delete, click the **Trash Can** icon.

6.7 Download a File attached to a Call

Fichiers joints

Appel 2081965

	Nom	Taille	Type	Date	Actions
☐	📄 My Linedata_Test_01.csv		csv	2014-06-07 13:38:15	⊕ 🗑

You may download Files attached to Calls.

1. Open Call detail form by clicking on its Call id number.
2. In the **Attachments** area, at the end of the row containing the file you want to download, click the **Trash Can** icon .

Note: you can perform the actions above on attachments in all areas of My Linedata.

6.8 Search Calls

A. Report of your Company Calls at an active status

Display of your Company's active Calls.

If you currently have no active calls, My Linedata displays your Company's active calls

To view all active calls no matter who raised them, in the filter section above the report, in the third field from the left, select **Raised by**.

In **Calls raised by** [.] tile, in title banner, click on corresponding button to:
- Format the report for printing
- Export the report as CSV = Download the report as file for Excel.

B. Filter Calls raised by year

Select a year to see all Calls raised by your Company during this year.

The report displays all calls, whether they are at an active or closed status.

C. Search

Enter a Call id or keywords and launch your query in the Calls database.

The search engine searches all active Calls..

D. SEARCH

Enter a Call or CR id or keywords and launch your query in the Calls or CRs database.

The search engine searches all Calls or CRs, whether they are at an active or closed status.

E. Advanced Search: Calls

Click **Calls** to display the Call detailed search form.

The appearance of the form differs depending on the Linedata product you are using.

Fill in the appropriate fields, and click **Search**.

6.9 Search CRs

A. SEARCH

Enter a Call or CR id or keywords and launch your query in the CRs database.

The search engine searches all CRs, whether they are at an active or closed status.

B. Advanced Search: CRs

Click on **CRs** link to display the CR Search form.

The appearance of the form differs depending on the Linedata product you are using.

Fill in the appropriate fields, and click **Search**.

6.10 Calls and CRs – Sorting

Do any of the following:

- To sort by a column, click its header.
- To sort by multiple columns:
  - Click the header of the first column to sort by, hold down **Ctrl**, and click the header of the second column.
  - Add extra columns by continuing to hold down **Ctrl,** and clicking them.

6.11 Calls and CRs: Navigating Search results

Each search result displays the:
- Result count in the lower left corner of the report
- Number of pages in the middle
- Number of rows displayed per page in the lower right corner of the report.

If your search results in numerous pages, you can navigate through the pages.

Do any of the following:
- To adjust the number of rows displayed per page, in **Rows**, select the appropriate number, and the page refreshes automatically.
- To move to the next page in the report, click **Next >**.
- To move to the last page click **Last**.
- To move to a specific page number click the appropriate number.

7. MY SOFTWARE

You can display information about the software you have purchased from Linedata.
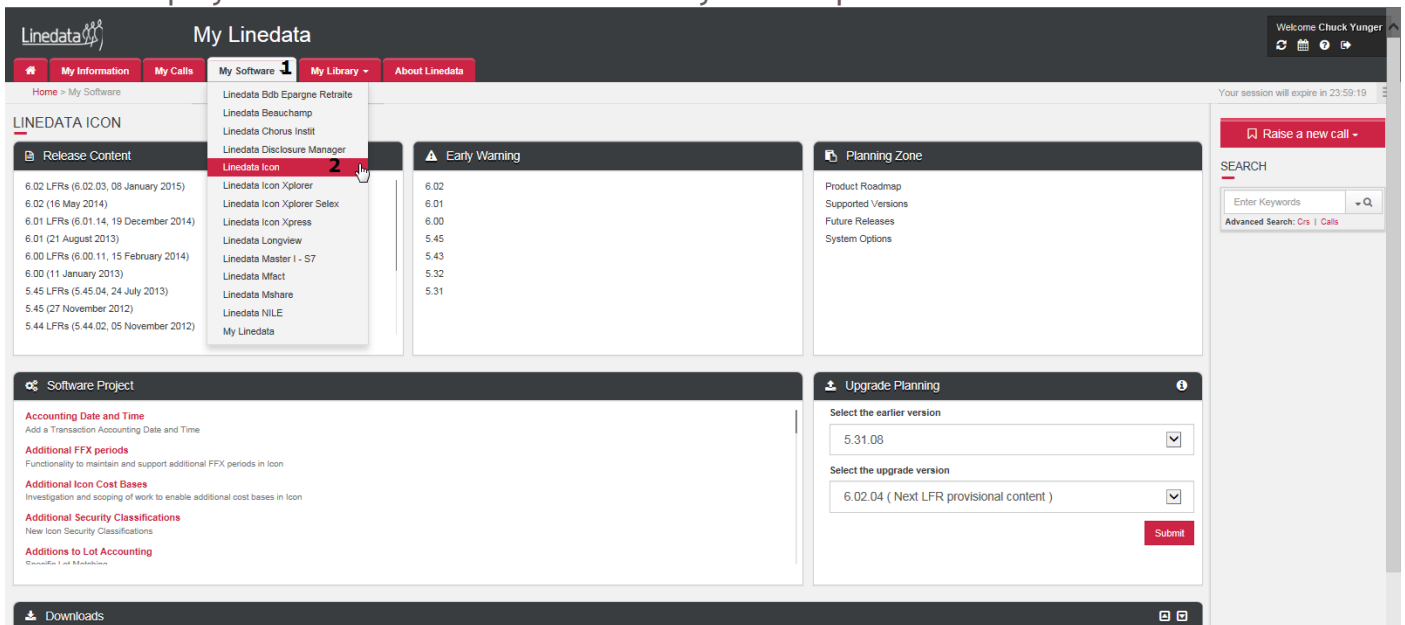
1. Click the My Software tab.
2. Select the Product for which you want to display details.
   The page structure is the same no matter which product you select.

   Tiles display information according to Product Teams Management.
3. Click the links to displaythe detailed content of Versions, Projects … and any documentation that may be attached.

8. MY LIBRARY

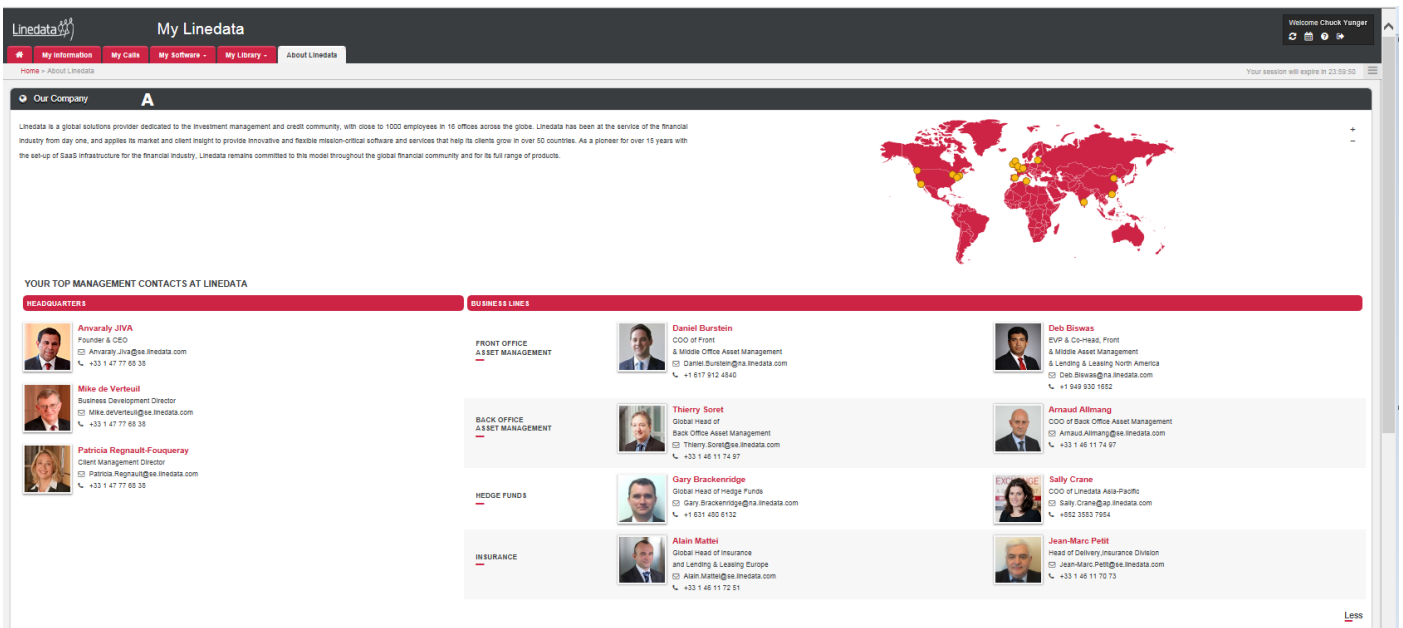You can view documents related to the Linedata products you have purchased by clicking the My Library tab.
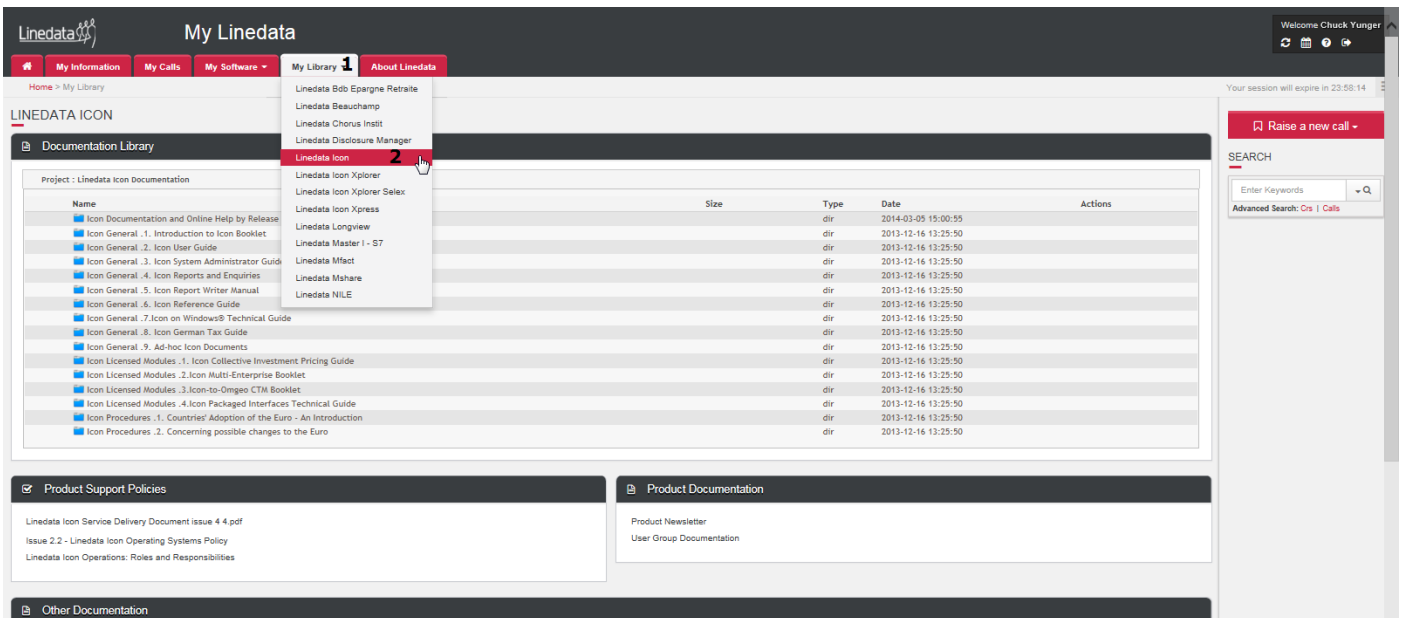
Display of User Documentation:

- Global and specific to each product.
- Possibly Specific to your Company.

9.   ABOUT LINEDATA

You can view information about Linedata by clicking the About Linedata tab.

A. Linedata: General Information

Reminder of software publisher activities dedicated to Asset Management, Insurance and Credits communities.

Display of Linedata map of offices around the world.

Display of Linedata Senior Management main Contacts.

Display of Linedata Business Line Managers.
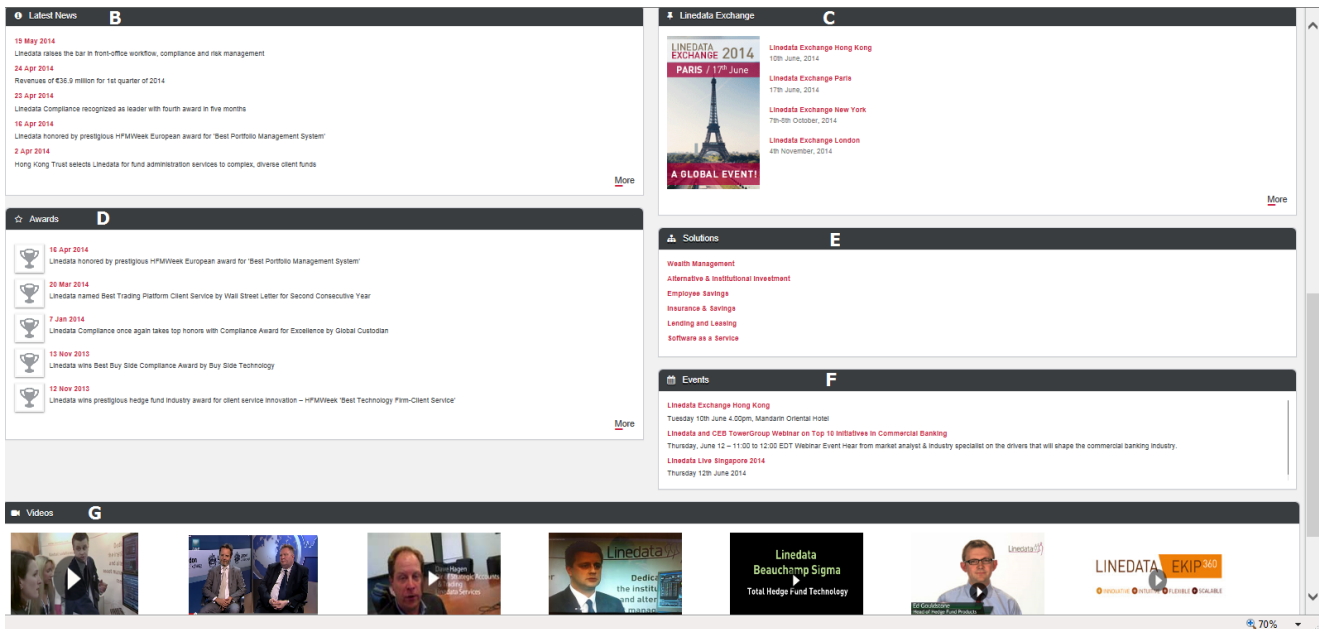
B. Latest News
Displays most recent press articles

C. Linedata Exchange
Displays upcoming Linedata Exchange programmes.

D. Awards
Displays awards received by Linedata for product performance and service quality.

E. Solutions
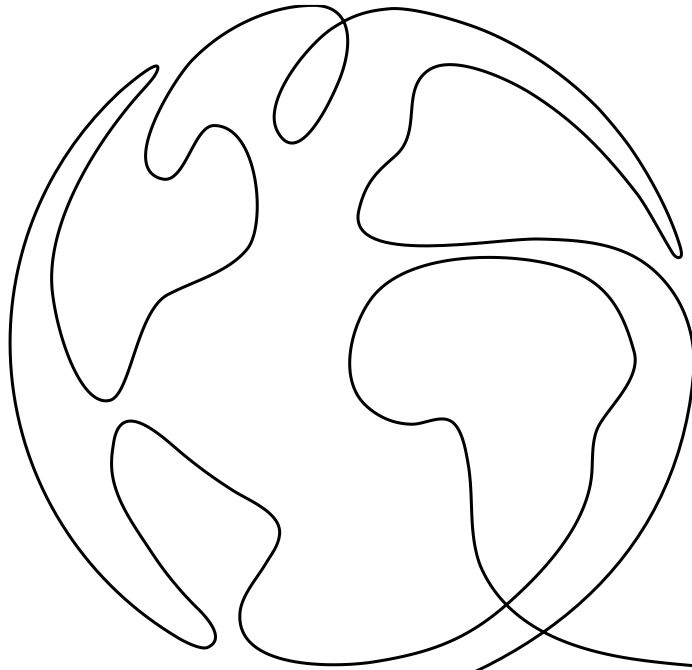Displays links to Linedata's Solutions.

F. Events
Displays upcoming events that organized by Linedata or in which Linedata will participate.

G. Videos
Linedata Media Communications.

USA

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Linedata
260 Franklin Street
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