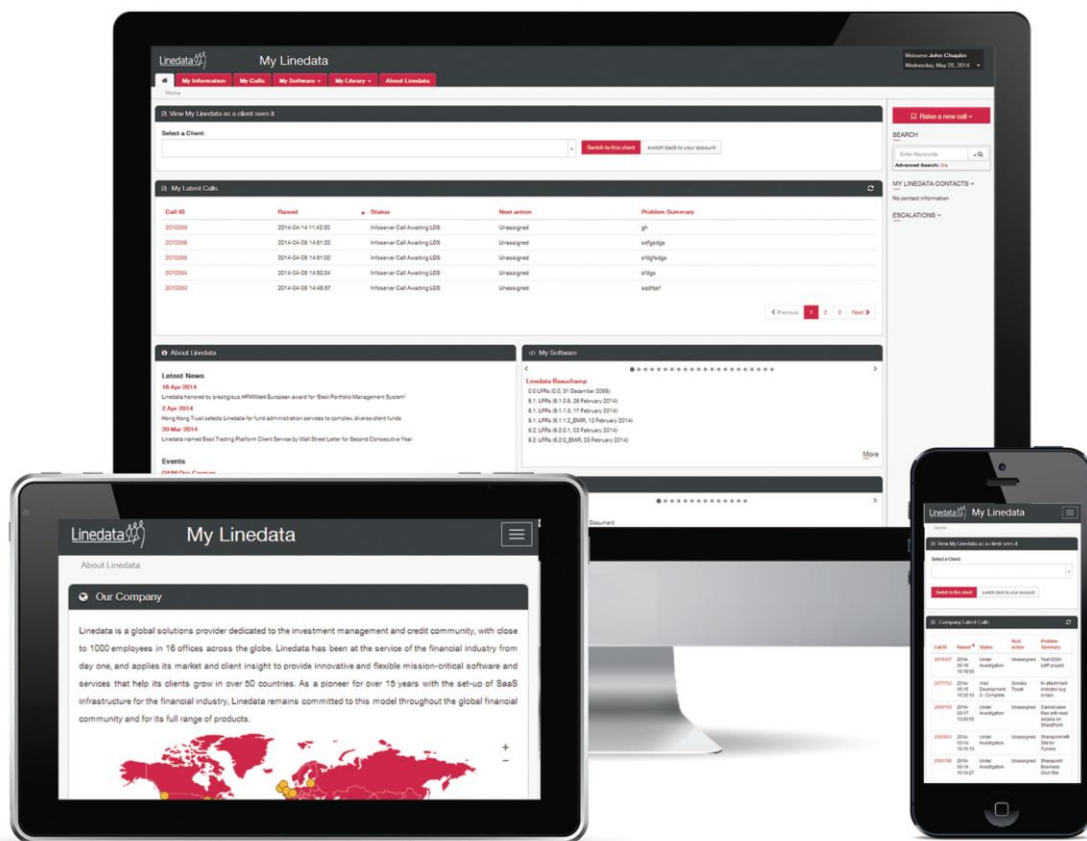


# MY LINEDATA

## 360° VISION OF YOUR LINEDATA



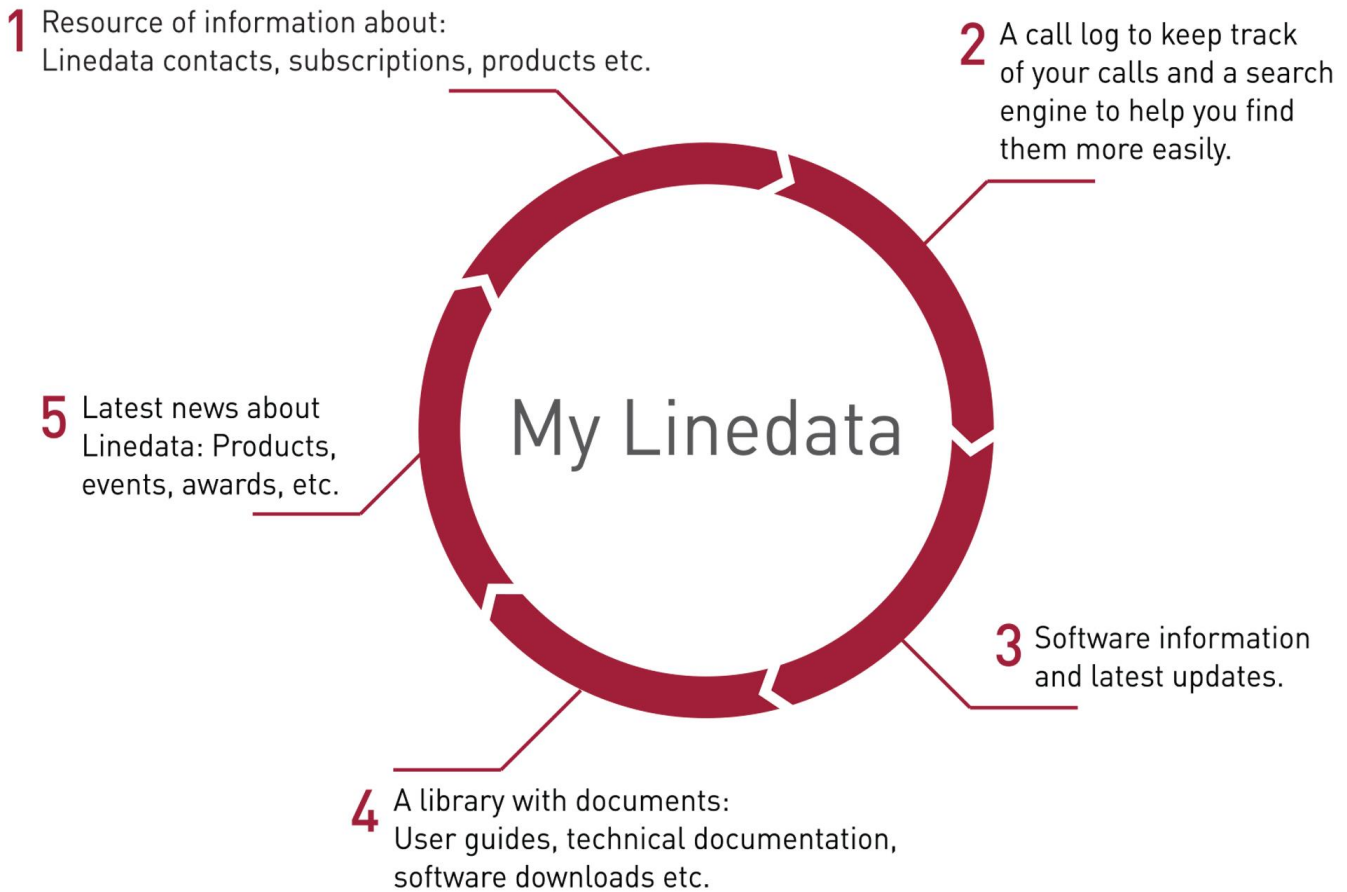
# USER GUIDE

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# 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. 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:**

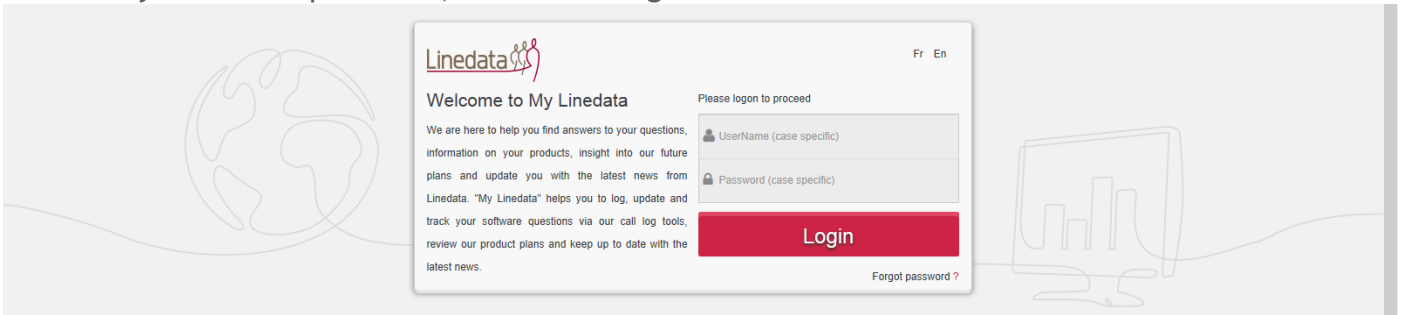
- Internet Explorer 6 and 7

## 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

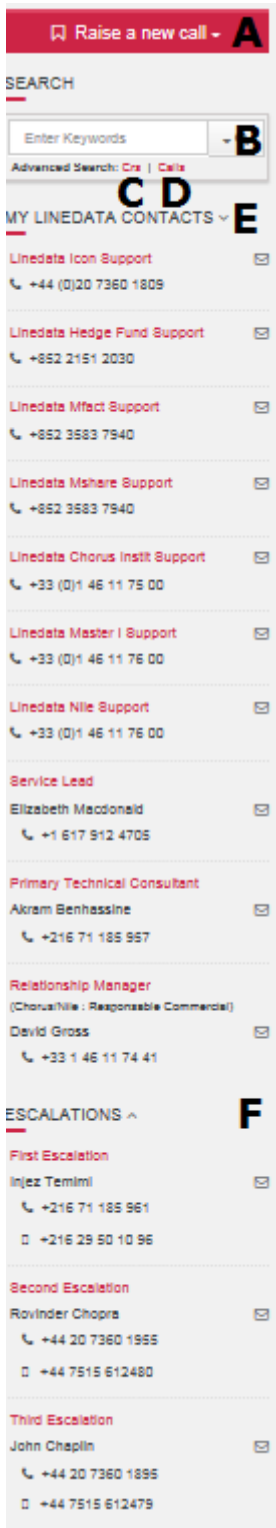
Click button to display/download the My Linedata User Guide.

#### 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

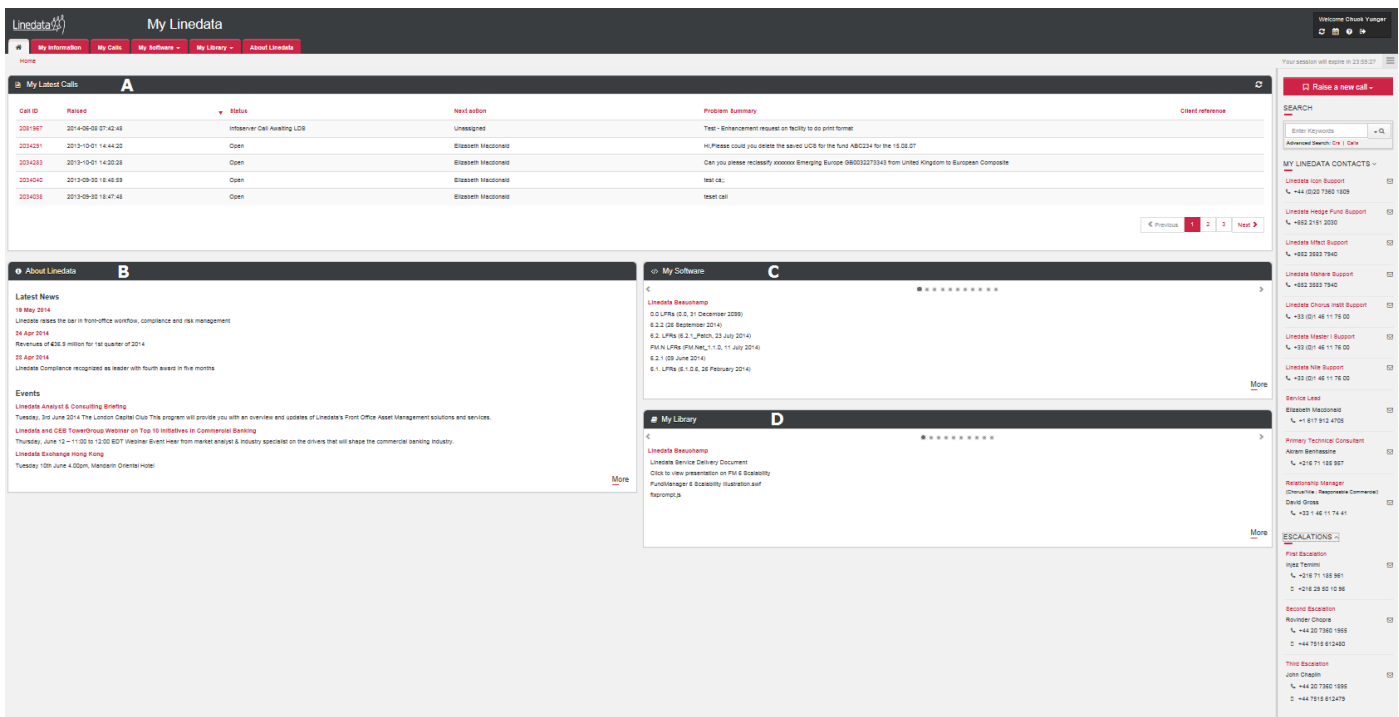
Displays Linedata Managers of a Product Line who are in charge of resolving your requests outside the standard process of Call Log Management.

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 by Linedata or in which Linedata takes part.

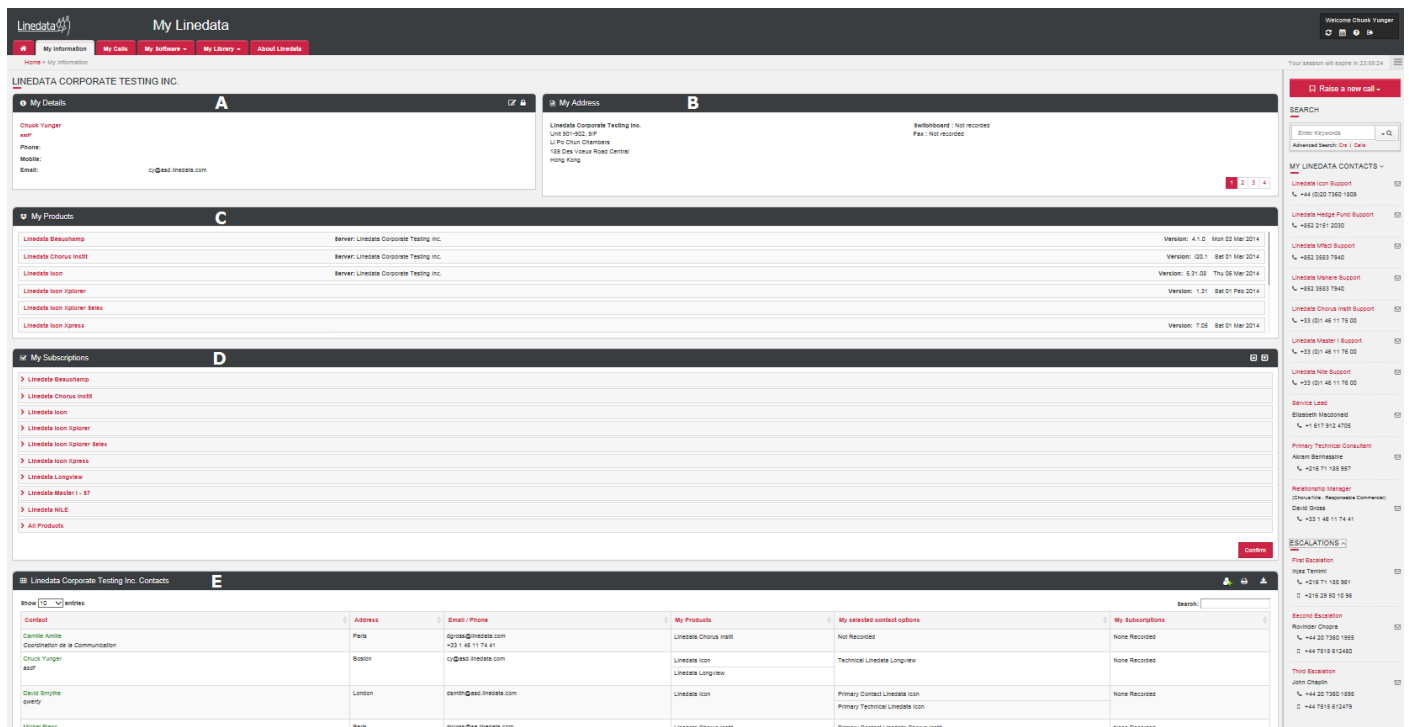
## C. My Software

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

Call ID	Subsystem	My Product	Raised By	Raised	Status	Next action	P.B.L.	Call type	Area	Last Journal	Problem Summary	Client reference
2001967	Icon - General	Linedata Icon	Chuck Yunger	2014-08-08 07:42:48	Unassigned	4		Issue	Live	2014-08-08 08:21:17	Test - Enhancement request on facility to do print format	
2004291	LongView Trading	Linedata Longview	Chuck Yunger	2013-10-01 14:44:20	Open	Elizabeth Macdonald	6	Other	Live		HiPlease could you delete the saved UCS for the fund ABC224 for the 18.08.07	
2004293	LongView Trading	Linedata Longview	Chuck Yunger	2013-10-01 14:20:28	Open	Elizabeth Macdonald	6	Other	Live		Can you please recheck? excess Emerging Europe 08032272343 from United Kingdom to European Composite	
2004040	LongView Trading	Linedata Longview	Chuck Yunger	2013-09-25 13:58:59	Open	Elizabeth Macdonald	6	Other	Live		test call.	
2004039	LongView Trading	Linedata Longview	Chuck Yunger	2013-09-25 14:47:45	Open	Elizabeth Macdonald	6	Other	Live		test call	
2004036	LongView Trading	Linedata Longview	Chuck Yunger	2013-09-25 14:17:35	Open	Elizabeth Macdonald	6	Other	Live		test	
2000000	Back Office Consulting	Linedata Mfcat	Chuck Yunger	2013-09-25 20:02:26	Open	Elizabeth Macdonald	6	Custom Code Enhancement	Live		This is a test call	
1930293	LongView Trading	Linedata Longview	Chuck Yunger	2012-05-13 16:36:53	Open	Elizabeth Macdonald	4	Other	Live		This is a test call	
1917703	Back Office Consulting	Linedata Mfcat	Chuck Yunger	2012-03-02 16:24:46	Open	Elizabeth Macdonald	4	Enhancement Request	Live		Consultancy Work Schedule - Upgrade LIV/LOC to T3028	
1408863	LongView Trading	Linedata Longview	Chuck Yunger	2009-01-05 16:28:20	Open	Unassigned	6	Other	Live		This is a test call for email testing for LYN	

### 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 by**.

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

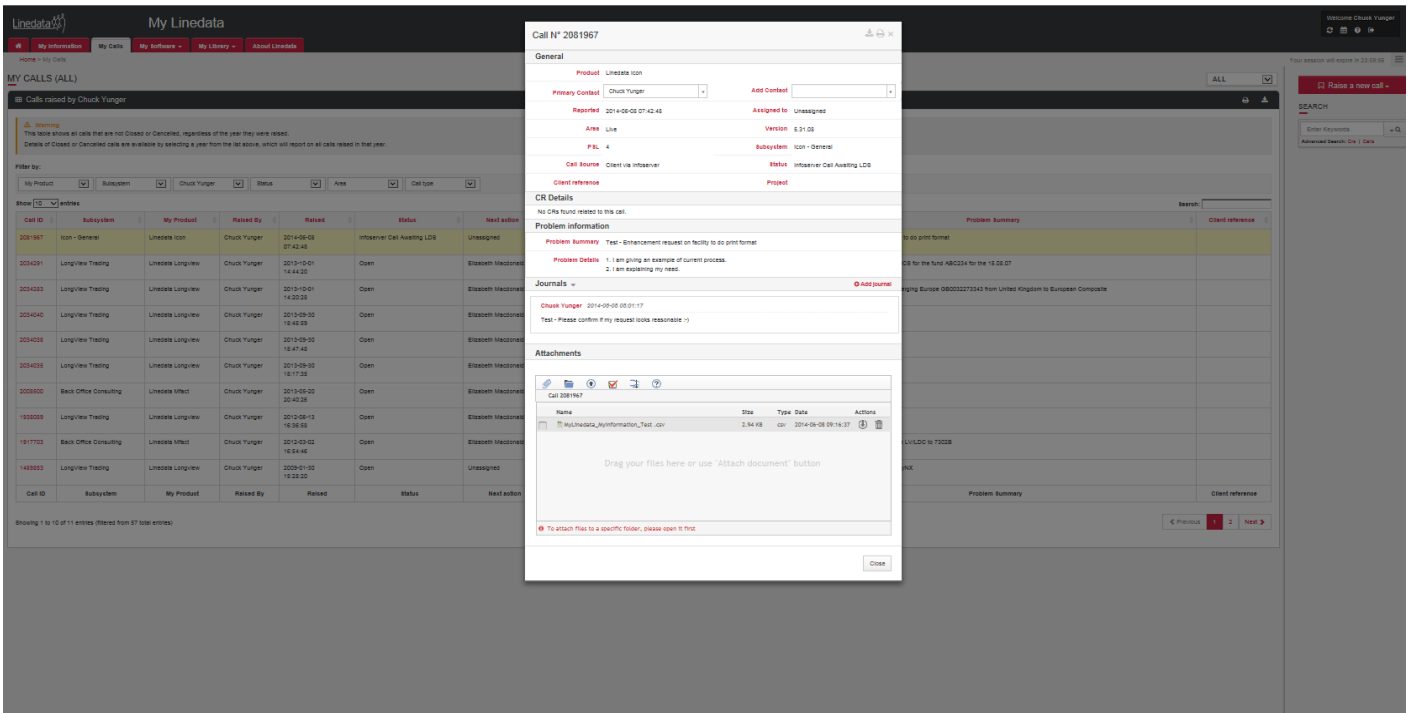
Enter a Call id or keywords to launch your query in the Calls database.

The search engine will search for occurrences of entered keywords or Call id on all active Calls.

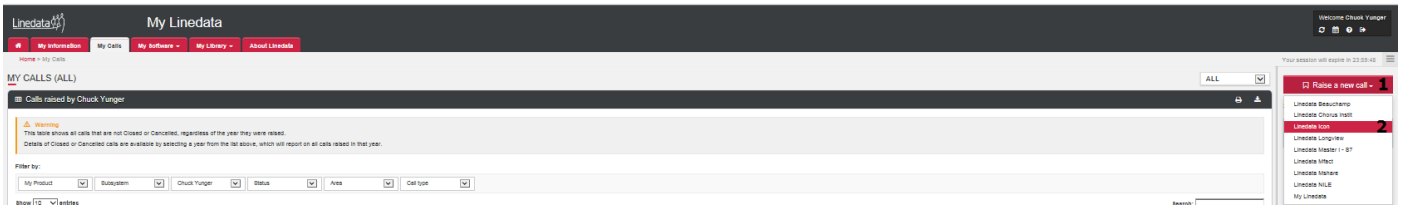
#### 6.1 See a Call

To display the details of a Call, click its Call id.

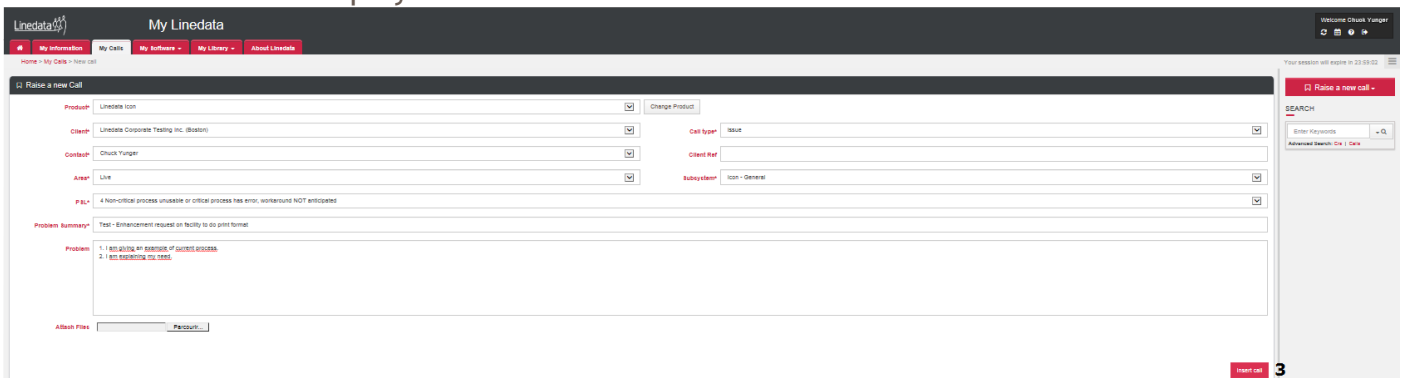




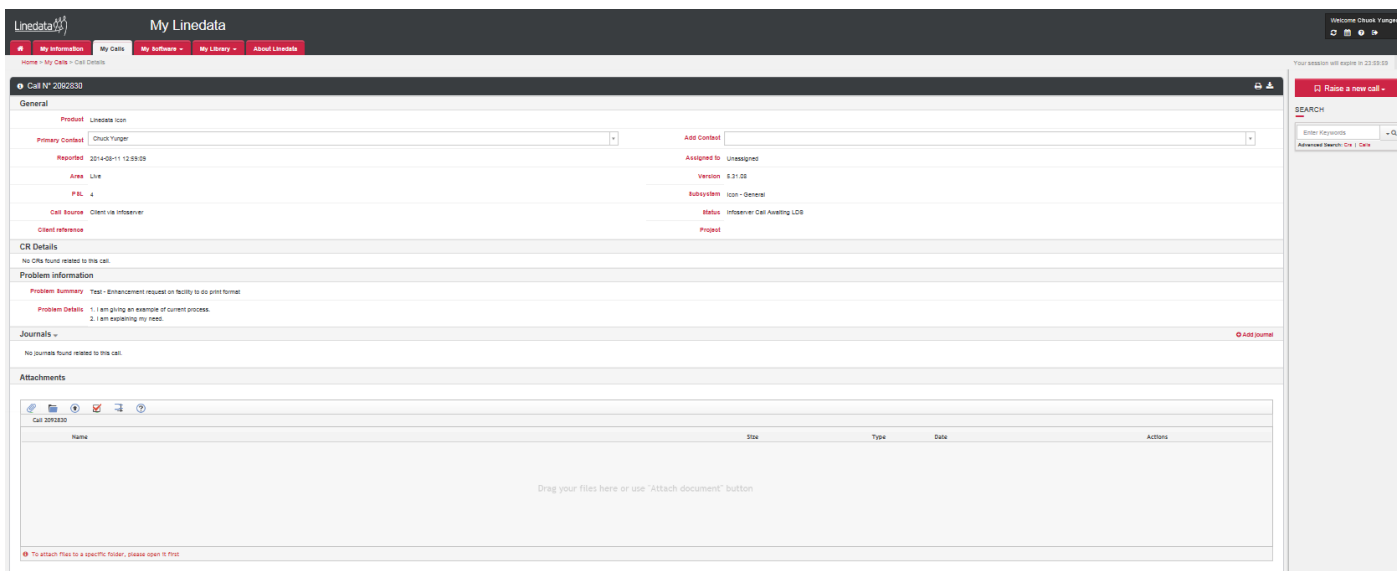
## 6.2 Raise a New Call



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

**Add Contact**

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				

**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
<input type="checkbox"/> 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
<input type="checkbox"/> 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

The screenshot shows the 'My Linedata' interface. The main content area is titled 'Calls raised by Chuck Yungler'. A warning message states: 'Warning: This table shows all calls that are not Closed or Cancelled, regardless of the year they were raised. Details of Closed or Cancelled calls are available by selecting a year from the list above, which will report on all calls raised in that year.' Below the warning is a filter section with dropdown menus for 'My Product', 'Subsystem', 'Chuck Yungler', 'Status', 'Area', 'Call type', and 'PSL'. A table of call records is displayed below the filter, with columns for 'Call ID', 'Subsystem', 'My Product', 'Raised By', 'Raised', 'Status', 'Crs', 'Next action', 'PSL', 'Call type', 'Area', 'Last Journal', 'Problem Summary', and 'Client reference'. A search bar is located to the right of the table. On the right side of the interface, there is a 'SEARCH' section with a search bar and a 'SELECT FIELDS' section with checkboxes for 'Subsystem', 'My Product', 'Raised By', 'Status', and 'Crs'. A 'Raise a new call' button is visible in the top right corner.

### 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**.

The screenshot shows the 'Call Search' form in the Linedata application. The form is titled 'Call Search' and is located under the 'My Linedata' header. It includes several sections:
 

- Product:** A dropdown menu set to 'All Products'.
- Raised by:** A dropdown menu set to '\* All Staff'.
- Call Source:** A dropdown menu set to 'All Sources'.
- Status:** A section with checkboxes for 'ALL', 'Awaiting Linedata', 'CR Pending', 'Cancelled', 'Awaiting Client Action', 'Closed', 'Open and all other status', 'Awaiting Client Acceptance', and 'CR Closed'.
- Date reported:** Two date input fields, 'From' (2015-01-01) and 'To' (2015-02-11).
- Include keywords in this search:** A checkbox set to 'NO'.

 A 'Search' button is located at the bottom right of the form. On the right side of the interface, there is a 'SELECT FIELDS [save]' list with various fields checked, including Product, Area Name, Raised Date, Closed Date, Source, Status, Raised By, Problem Summary, Problem Details, and Client reference. A 'Raise a new call' button is also visible at the top right.

## 6.9 Search CRs

The screenshot shows the 'MY CALLS (ALL)' section in the Linedata application. The header includes 'My Linedata' and 'Welcome Chuck Yungler'. Below the header, there is a navigation bar with 'My Information', 'My Calls', 'My Software', 'My Library', and 'About Linedata'. The main content area is titled 'MY CALLS (ALL)' and includes a dropdown menu set to 'ALL'. A warning message is displayed:
 

**Warning**  
This table shows all calls that are not Closed or Cancelled, regardless of the year they were raised. Details of Closed or Cancelled calls are available by selecting a year from the list above, which will report on all calls raised in that year.

 On the right side, there is a 'SEARCH' section with a text input field for 'Enter Keywords' and a search button. A 'Raise a new call' button is also visible at the top right.

### 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.

The screenshot shows the 'Cr Search' form in the Linedata application. The form is titled 'Cr Search' and is located under the 'My Linedata' header. It includes several sections:
 

- Product:** A dropdown menu set to 'All Products'.
- Status:** A section with checkboxes for 'Released', 'No Action/Previously Done', and 'All Active Status'.
- Class/PSL:** A dropdown menu set to 'All Class' and a list of checkboxes for 'PSL 1', 'PSL 2', 'PSL 3', 'PSL 4', 'PSL 5', 'PSL 6', and 'Not allocated'.
- Date reported:** Two date input fields, 'From' (2003-05-31) and 'To' (2015-02-11).
- Release row filters:** A dropdown menu set to 'All Release lines'.
- Include keywords in this search:** A checkbox set to 'NO'.

 A 'Search' button is located at the bottom right of the form. On the right side of the interface, there is a 'SELECT OTHER FIELDS [save]' list with various fields checked, including Call ID, Summary, Actual Release, Forecast Release, Current Status, Product, Date Entered, PSL, Subsystem, Solution Summary, Server, Date reported, Client reference, Error type, and Contact. A 'Raise a new call' button is also visible at the top right.

## 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.

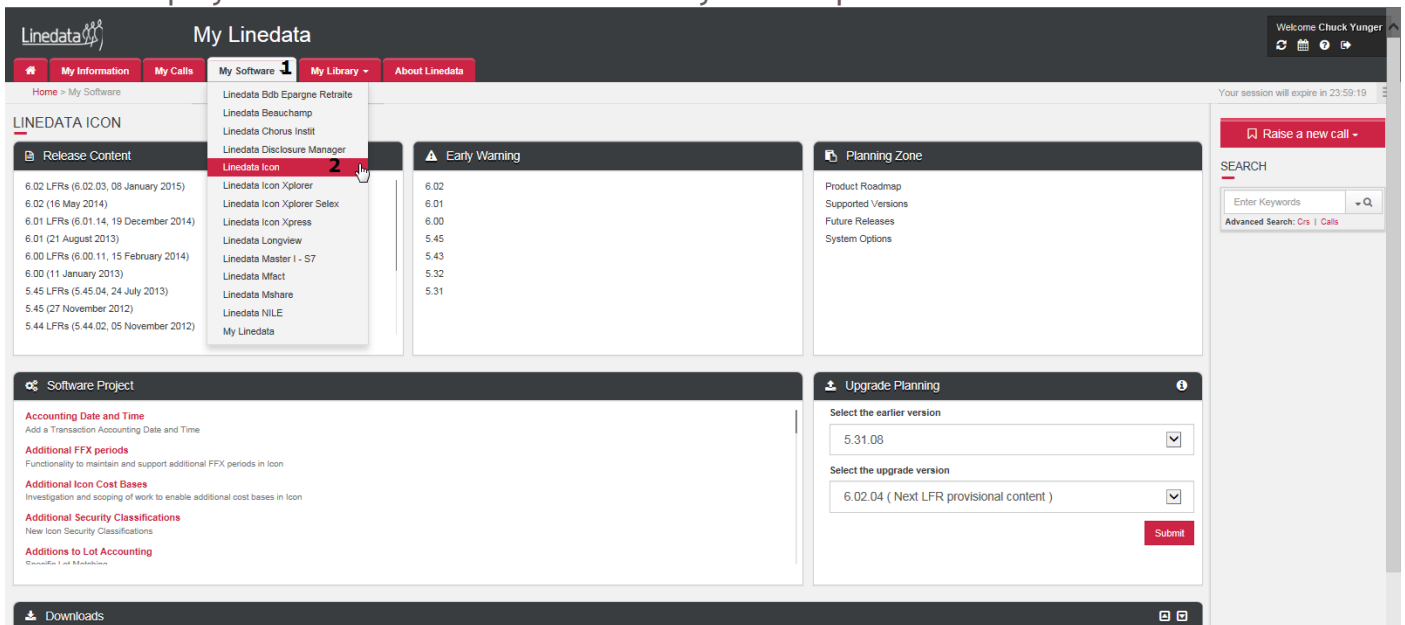


Do any of the following:

- 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

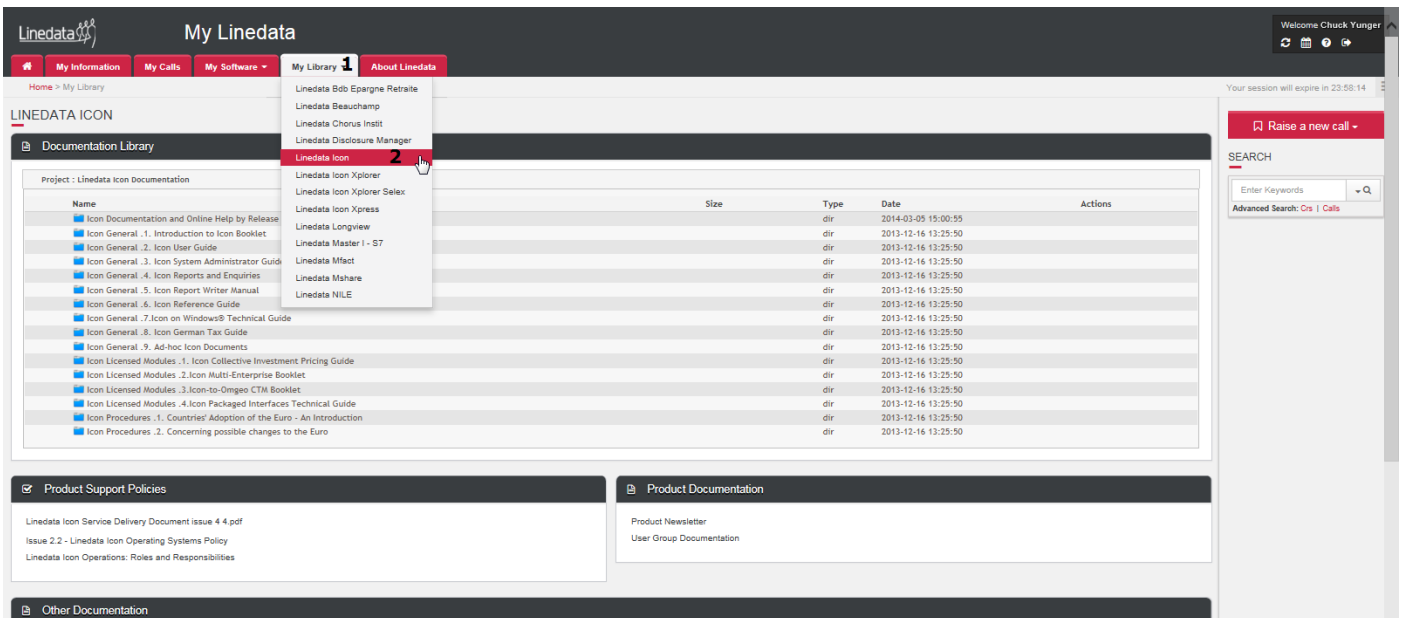
You can display information about the software you have purchased from Linedata.



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 display the 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.

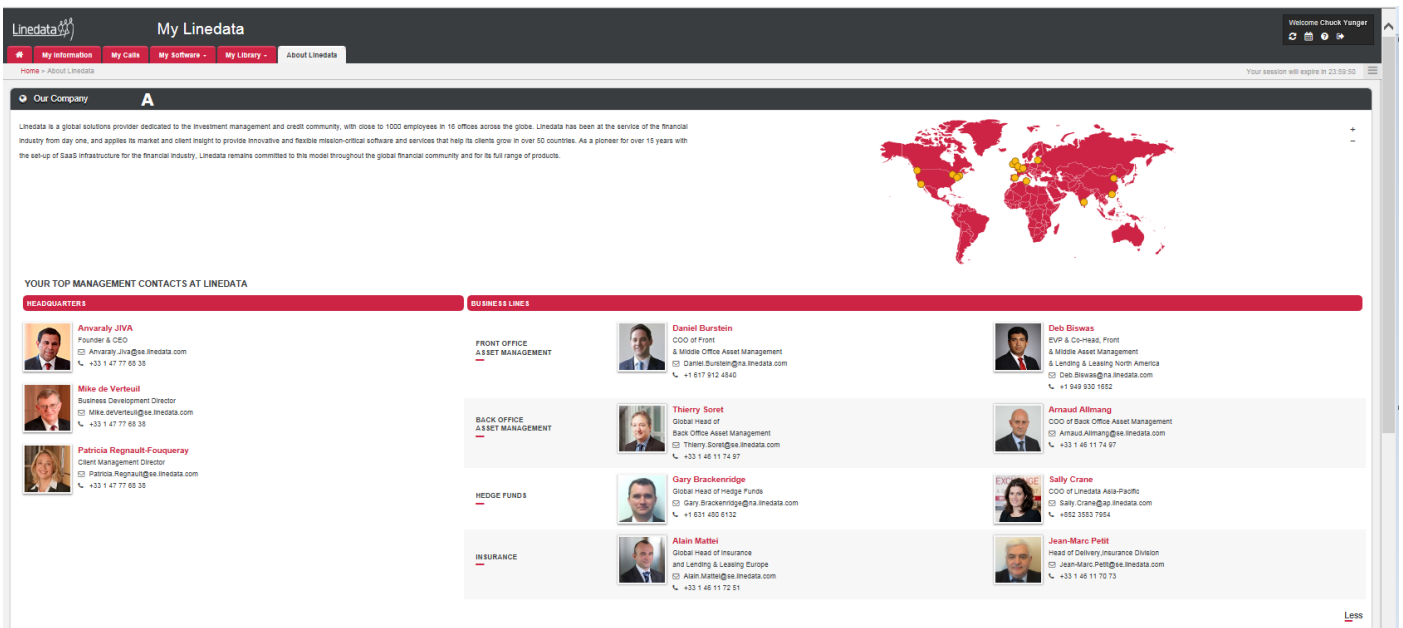


Display of User Documentation:

- 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.



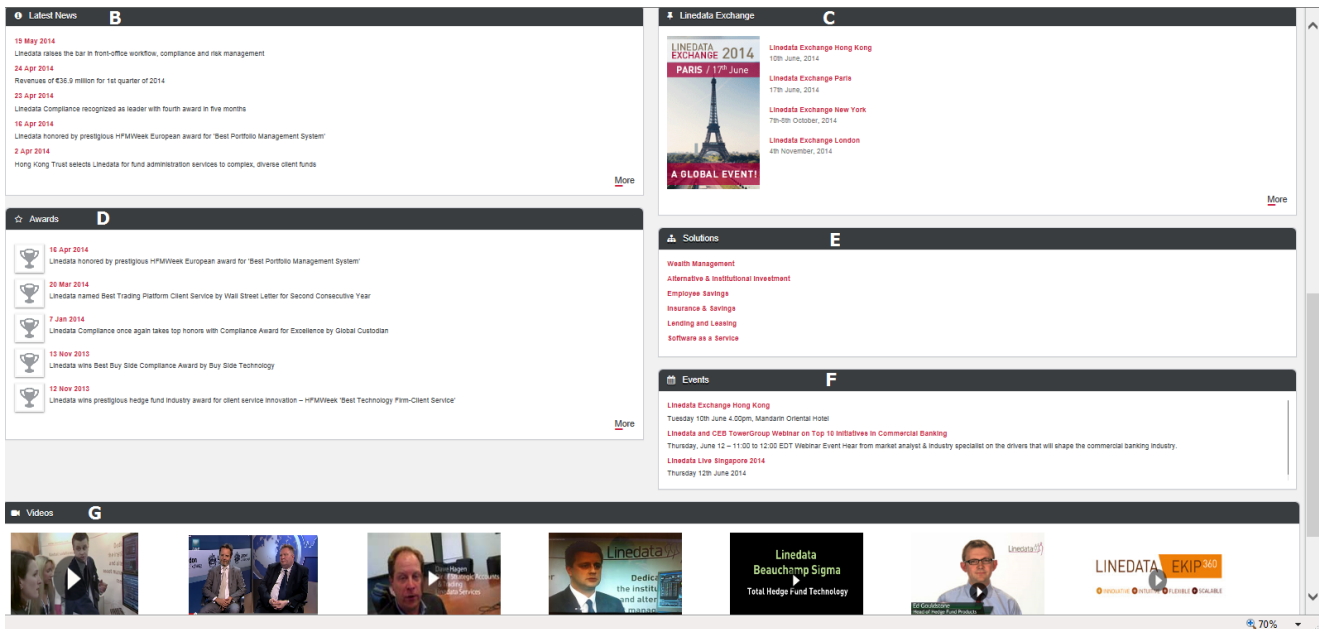
### A. Linedata: General Information

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

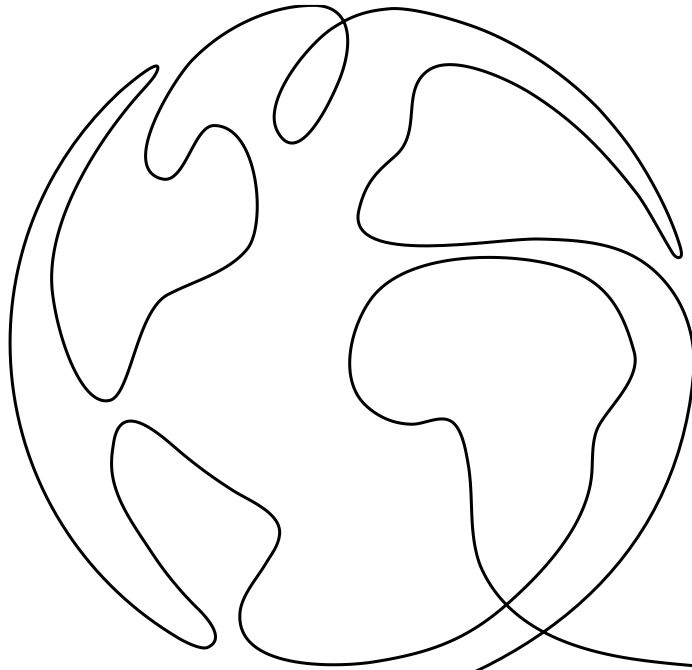
Displays upcoming events that organized by Linedata or in which Linedata will participate.

## G. Videos

Linedata Media Communications.







## USA

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