

User Guide

Self-Service Client Portal

Version 1



Portal Overview	3
Logging In to the Portal	3
Viewing Your Cases	4
Logging a New Case	8
Email Notifications	12

Portal Overview

This document will demonstrate how to use the Salesforce Client Portal. The Salesforce Client Portal allows LIM customers to view, and update the inquiries they have reported to LIM. The Portal also enables LIM customers to report new issues to LIM.

Logging In to the Portal

To log in to the Self-Service portal:

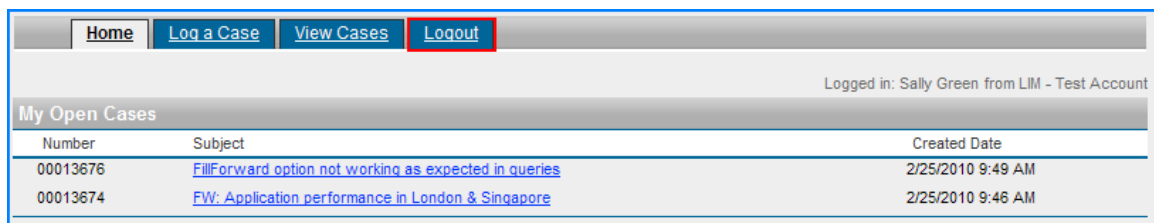
- ▶ Open the Self-Service portal in your browser. The URL is: www.lim.com/support
- ▶ Enter your username and password as provided via email.

If you do not have your password available, click **Forgot your password?**. Enter your user name and click **Submit**. You will receive an email with a temporary password. When you log in to the Self-Service portal, you will be asked to reset your password.

- ▶ Click **Login**.



Once logged in, you will be in the **Home** tab. To log out of the Self-Service portal, simply click the **Logout** tab.

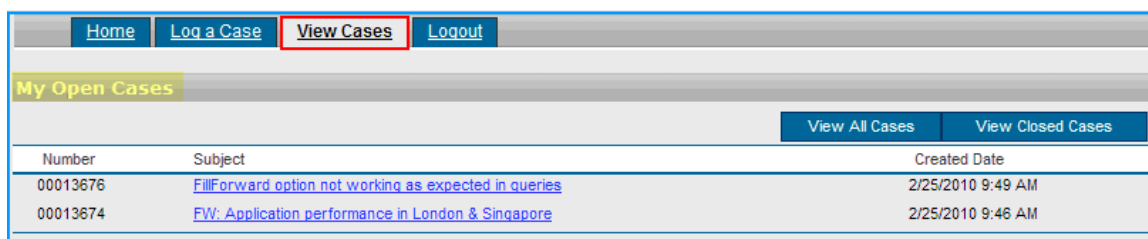


Number	Subject	Created Date
00013676	FillForward option not working as expected in queries	2/25/2010 9:49 AM
00013674	FW: Application performance in London & Singapore	2/25/2010 9:46 AM

Viewing Your Cases

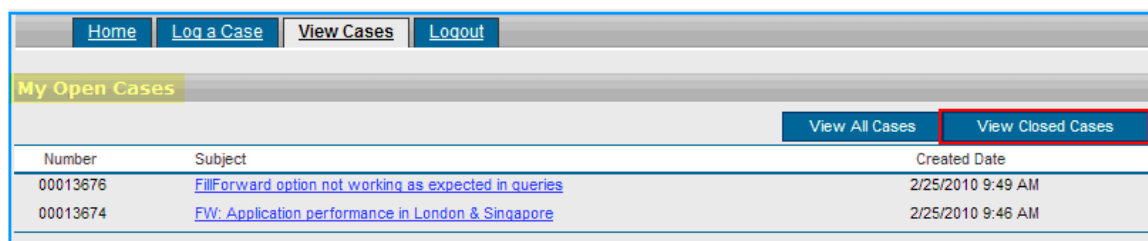
In the Self-Service portal, the inquiries that you submit to the Customer Support team are called "cases." To view your open and resolved cases:

- ▶ Click the **View Cases** tab. The open cases that you have submitted are displayed. The title bar that is highlighted yellow will indicate what case view you are in.



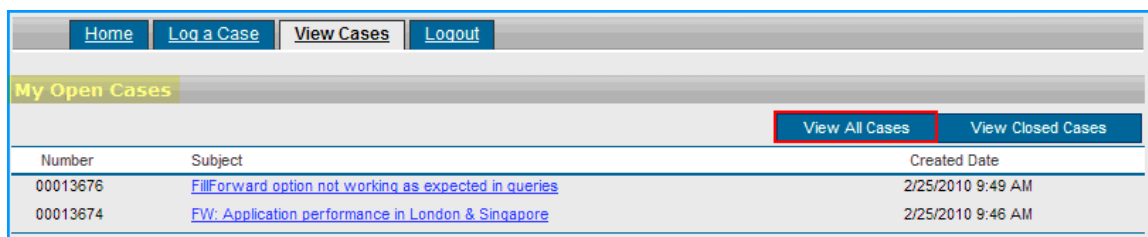
Number	Subject	Created Date
00013676	FillForward option not working as expected in queries	2/25/2010 9:49 AM
00013674	FW: Application performance in London & Singapore	2/25/2010 9:46 AM

- Optionally, click the **View Closed Cases** button to view a list of your resolved cases.



Number	Subject	Created Date
00013676	FillForward option not working as expected in queries	2/25/2010 9:49 AM
00013674	FW: Application performance in London & Singapore	2/25/2010 9:46 AM

- If you are a Self-Service portal "super user," you will be able to view all of the open and resolved cases submitted by everyone in your company by clicking the **View All Cases** button.



Number	Subject	Created Date
00013676	FillForward option not working as expected in queries	2/25/2010 9:49 AM
00013674	FW: Application performance in London & Singapore	2/25/2010 9:46 AM

- After selecting **View all Cases**, you will be in the **All Open Cases** view.

All Open Cases			View My Cases	View Closed Cases
Number	Subject	Created Date		
00013868	test case	3/3/2010 2:40 PM		
00013685	Do you have Natural Gas futures from the NYMEX?	2/25/2010 11:33 AM		
00013676	FillForward option not working as expected in queries	2/25/2010 9:49 AM		
00013674	FW: Application performance in London & Singapore	2/25/2010 9:46 AM		
00013342	data schema	2/11/2010 3:04 PM		
00005055	MIMIC 5.1 Enhancement	12/22/2009 7:52 AM		
00003697	Mimic 5.1 Conversion Point	11/11/2009 11:07 AM		
00001120	dev test 1 8.19.2009	8/19/2009 9:37 AM		

- ▶ While in any of the various views, select a case subject to view the details of the case.

My Closed Cases			View All Cases	View Open Cases
Number	Subject	Created Date		
00013673	What is the meaning of Fd, Td, MA, DA in Platts symbols?	2/25/2010 9:23 AM		
00001470	setting up Futures Questions	10/7/2009 2:33 PM		
00001367	New client setup	9/28/2009 2:34 PM		
00001349	Incident Assignment: 60883: Database: PJM hour 24 data for 8/31/2009	9/25/2009 3:17 PM		
00001339	RE: MIMIC 4.2.0.4 upgrade	9/24/2009 2:48 PM		
00001268	Test Add Case with undefined email	9/15/2009 3:27 PM		
00001254	Test Add email to Open Case	9/11/2009 1:46 PM		
00001242	Test: Add Case 09 10 09	9/10/2009 11:49 AM		
00001234	(TEST) Add case 09 10 09	9/10/2009 8:57 AM		

The case details are shown, including the case number, status, last modified date, and any comments that have been added to the case. Cases logged prior to the implementation of the Portal will not display case comments.

Home Log a Case View Cases Logout	
Case 00013673	
Case Number: 00013673	Status: Closed
Type: Question	Case Origin: Phone
Contact Name: Sally Green	Date/Time Opened: 2/25/2010 9:23 AM
	Date/Time Closed: 2/25/2010 9:33 AM
	Last Modified Date: 2/25/2010 9:33 AM
Product: Data	
Subject: What is the meaning of FDt, Tdt, MA, DA in Platts symbols?	
Description: What do the abbreviations for Platts Megawatt Daily codes stand for (i.e., FDt, Tdt, MA, DA, etc)?	
Add Comment Add Attachment	
Related Comments	
Comment 2/25/2010 9:24 AM Denise Simek These are provided by Platts as part of their description. Tdt - transaction date - when the transaction occurred FDt - flow date - the dates that the electricity is flowing as per Megawatt Daily DW - time frequency is daily/weekday - updates 5 days a week (M-F) WA - time frequency is weekly MA - time frequency is monthly - Monthly average DA - time frequency is daily - updates 7 days a week OPk - off peak hours as defined by Megawatt Daily Pk - peak hours as defined by Megawatt Daily	

- Optionally, the **Home** tab displays all of your open cases when you log in. To view a case from the **Home** tab, click its subject.

- Optionally, Add a Comment or Attachment to your case

Home Log a Case View Cases Logout

Case 00013673

Case Number:	00013673	Status:	Closed
Type:	Question	Case Origin:	Phone
Contact Name:	Sally Green	Date/Time Opened:	2/25/2010 9:23 AM
		Date/Time Closed:	2/25/2010 9:33 AM
		Last Modified Date:	2/25/2010 9:33 AM

Product:
Data

Subject:
What is the meaning of FDT, TDT, MA, DA in Platts symbols?

Description:
What do the abbreviations for Platts Megawatt Daily codes stand for (i.e., FDT, TDT, MA, DA, etc)?

Add Comment Add Attachment

Related Comments

Comment

2/25/2010 9:24 AM | Denise Simek
These are provided by Platts as part of their description.
TDT - transaction date - when the transaction occurred
FDT - flow date - the dates that the electricity is flowing as per Megawatt Daily
DW - time frequency is daily/weekday - updates 5 days a week (M-F)
WA - time frequency is weekly
MA - time frequency is monthly - Monthly average
DA - time frequency is daily - updates 7 days a week
OPk - off peak hours as defined by Megawatt Daily
Pk - peak hours as defined by Megawatt Daily

- Click **Add Comment** to add a comment related to your specific case and Click Submit when done.

Home Log a Case View Cases Logout

Submit Comment

Comment:

Submit Cancel

- Click **Add Attachment** to add a file to your specific case that you think would assist the support team in answering your inquiry. This can be any file but especially, a MIMIC Worksheet, XMIM query, or Excel Workbook

Attach File

- 1. Select the File**
Type the path of the file or click the Browse button to find the file.
- 2. Click the "Attach File" button.**
Repeat steps 1 and 2 to attach multiple files.
(When the upload is complete the file information will appear below.)
- 3. Click the Done button to return to the previous page.**
(This will cancel an in-progress upload.)

Logging a New Case

If you have a new inquiry, you can submit a case to our Customer Support team. There are 2 ways to submit a case automatically; via email or through the portal

Via Email –

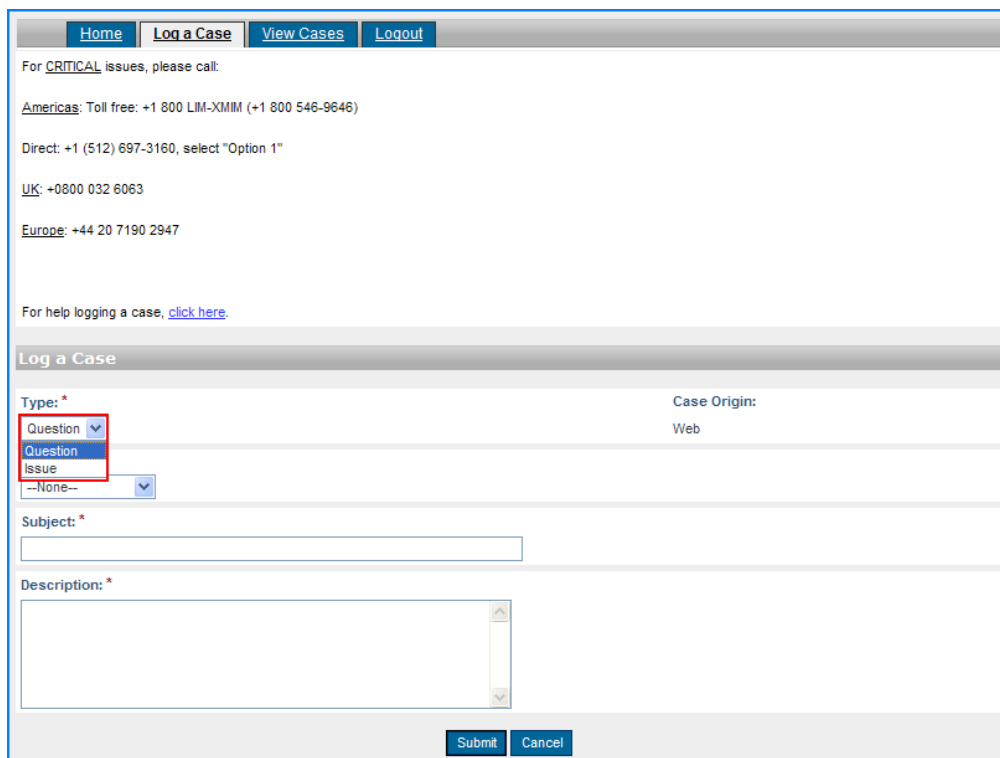
- ▶ Send an email to supportcases@lim.com including the details of your request or question.

Via the portal

- ▶ Click the **Log a Case** tab.

Number	Subject	Created Date
00013676	FillForward option not working as expected in queries	2/25/2010 9:49 AM
00013674	FW: Application performance in London & Singapore	2/25/2010 9:46 AM

- ▶ Select the type of case you are logging from the drop-down, either Question or Issue.

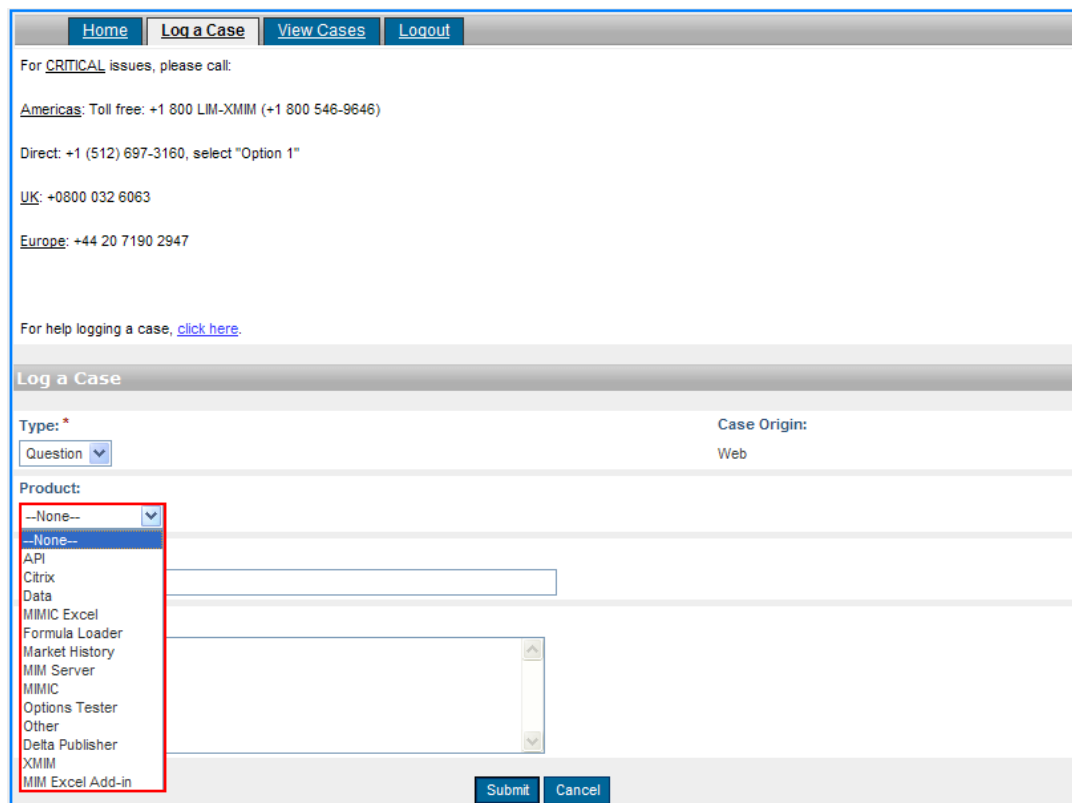


The screenshot shows the 'Log a Case' form in the Salesforce Client Portal. At the top, there are navigation tabs: Home, Log a Case, View Cases, and Logout. Below the tabs, there is contact information for CRITICAL issues, including phone numbers for Americas, Direct, UK, and Europe. A link for help logging a case is provided. The main form area is titled 'Log a Case' and contains the following fields:

- Type:** A dropdown menu with 'Question' selected and highlighted by a red box. Other options include 'Issue' and '--None--'.
- Case Origin:** A text field with 'Web' entered.
- Subject:** A text input field.
- Description:** A text area with a scroll bar.

At the bottom of the form, there are 'Submit' and 'Cancel' buttons.

- ▶ Select the Product that the case is in reference to.



The screenshot shows the 'Log a Case' form in the Salesforce Client Portal, similar to the previous one. The 'Type' dropdown is set to 'Question' and 'Case Origin' is 'Web'. The 'Product' dropdown menu is open and highlighted by a red box, showing a list of product names:

- None--
- API
- Citrix
- Data
- MMIC Excel
- Formula Loader
- Market History
- MIM Server
- MMIC
- Options Tester
- Other
- Delta Publisher
- XMIM
- MIM Excel Add-in

The 'Subject' and 'Description' fields are empty. At the bottom, there are 'Submit' and 'Cancel' buttons.

- ▶ Use guide to help select the appropriate product
 - **API** – Inquiry regarding API programming
 - **Citrix** - Inquiry regarding connecting /running the applications through the Citrix website
 - **Data** - Inquiry regarding the data (availability, location or source), data dispute or missing data issue
 - **MIMIC Excel** – Inquiry regarding running MIMIC worksheets inside Excel
 - **Formula Loader** – Inquiry regarding the Formula Loader that loads the data output from saved queries
 - **Market History** – Inquiry regarding subscription or content on Markethistory.com
 - **MIM Server** – Inquiry regarding Server questions or issues
 - **MIMIC** – Inquiry regarding usage or behavior of the MIMIC application
 - **Options Tester** – Inquiry regarding usage or behavior of the MIMIC application
 - **Other** – Select if none of the products represents your inquiry
 - **Delta Publisher** – Inquiry regarding usage or behavior of the Delta Publisher
 - **XMIM** – Inquiry regarding usage or behavior of the XMIM application
 - **MIM Excel Add-in** – Inquiry regarding usage or behavior in the MIM Excel Add-in (not to be confused with the MIMIC Excel)

*If you are logging a case regarding the data then the product is Data regardless of which application you are using.

- ▶ Enter a subject and description for your case. Enter as much information as you can to assist our Customer Support reps in responding to your inquiry.
- ▶ Click **Submit** to complete the issue

Home Log a Case View Cases Logout

For **CRITICAL** issues, please call:

Americas: Toll free: +1 800 LIM-XMIM (+1 800 546-9646)

Direct: +1 (512) 697-3160, select "Option 1"

UK: +0800 032 6063

Europe: +44 20 7190 2947

For help logging a case, [click here](#).

Log a Case

Type: * Case Origin:
Question Web

Product:
Data

Subject: *
Do you have Natural Gas futures from the NYMEX?

Description: *
I need to know where I can find the symbol of Nymex Nat gas? Here is the site I am looking at and need to find these prices in MIMIC.
<http://www.cmegroup.com/trading/energy/natural-gas/natural-gas.htm>

Submit Cancel

- Once the issue is submitted, click **Add Comment** to add additional comments related to your specific case.
- Additionally, you can click **Add Attachment** to add a file to your specific case that you think would assist the support team in answering your inquiry.

Home | Log a Case | View Cases | Logout

Case 00013685

Case Number: 00013685	Status: Open
Type: Question	Case Origin: Web
Contact Name: Sally Green	Date/Time Opened: 2/25/2010 11:33 AM
	Date/Time Closed:
	Last Modified Date: 2/25/2010 11:33 AM
Product: Data	
Subject: Do you have Natural Gas futures from the NYMEX?	
Description: I need to know where I can find the symbol of Nymex Nat gas? Here is the site I am looking at and need to find these prices in MMIC. http://www.cmegroup.com/trading/energy/natural-gas/natural-gas.html	

Add Comment | Add Attachment

Related Comments
None Found

Email Notifications

Email notifications will be sent when the following actions take place.

- ▶ You, as a customer/user, log a case through the portal – Email is sent to the user and LIM support indicating a new case has been created
- ▶ You, as a customer/user, adds a comment or an attachment to an issue – LIM Support gets an email indicating that the case has been updated
- ▶ LIM support staff enters a public comment – You, as a customer/user, gets an email indicating that the case has been updated.
- ▶ LIM support staff closes the case - User gets an email indicating the case has been closed