



**LEARN MORE!**

**Best Practices for Support  
Requests & Managing  
your Cases**

---



# THE OPUS SUPPORT PORTAL

## Opus Community Portal



# OPUS ADVISOR

TARGETED HELP WHEN YOU NEED IT

Contact us today to learn more!

[Click here to see Opus Advisor in action!](#)

[Contact Support](#)

My Cases ▾ Printable View

24 items • Sorted by Status • Filtered by All cases - Customer Case?, Status, Disposition • Updated a few seconds ago  ⚙️ 🔄

Case Number	Status	Subject
1	Product Management Working	How the ability to register a previously published case from the web tool
2	Product Management Working	Enhancement ability to the new device address
3	Product Management Working	Address Enhancement and case notification of new content

# ACCESSING THE SUPPORT PORTAL FROM DASHBOARD

The screenshot shows the Opus dashboard interface. At the top, the navigation bar includes the Opus logo (Powered by Epilogue Systems) and menu items: DASHBOARD, TASKS, PROJECTS, CONTENTS, and ANALYTICS. The user profile is identified as LeAndra Fisher LEANDRA. A dropdown menu is open, listing options: My Profile, Email Preferences, Account Info, Billing, Settings, Online Help, Community (highlighted with a red circle), and Logout. The main content area is divided into three columns. The left column, 'My Tasks', lists 'Install the Opus Web Recorder Extension', 'View a wait list', and 'Resolve a problem in ITSM desktop client (edit selected content)'. The middle column, 'My Projects', lists 'SPA', 'Salesforce' (highlighted), 'Project for Tuesday', 'Oracle Fusion', 'Opus Quick Start Guide', 'ABC Project', and 'Test for CMSE'. The right column contains a 'What's the difference & Author?' section with a link to 'Opus Community Portal' (circled in red), and an 'Opus Technical Support' section. At the bottom, the 'My Contents' section displays a table of content items.

**My Tasks**

- Install the Opus Web Recorder Extension
- View a wait list
- Resolve a problem in ITSM desktop client (edit selected content)

**My Projects**

- SPA
- Salesforce
- Project for Tuesday
- Oracle Fusion
- Opus Quick Start Guide
- ABC Project
- Test for CMSE

**My Contents**

Title	Status	Date	Views
Salesforce - Installed Packages	Imported	01/13/2022	0
Lawson - Find/Print Payroll Check Stub (Valid Thru 1/31/22)	Imported	01/13/2022	0

**What's the difference & Author?**

The document Owner is a manual field that typically designates the responsible for the document co-screen displays the Owner and th hyperlinked to their email.

The document Author is the last on a document and is updated at

[Here's more info on how autho the Opus workflow!](#)

**Opus Technical Support**

Visit our Opus Community to manage & log your cases. If you are not already a member, simply select Sign Up on the log-in page.

[Opus Community Portal](#)

**System Status**

September 9th, 2022:

We have resolved the issue preventing content lin loading that originated from the Contents page. Nu 2 and 3 below are expected to be corrected during our next Opus update Tuesday, September 13th. To recap the current status, please see below:

# CREATE YOUR SUPPORT ACCOUNT

The image displays two screenshots of the Opus user interface. The left screenshot shows the login page with the 'Opus' logo at the top. Below the logo, there is a message: 'To access this page, you have to log in to Epilogue.' The login form includes fields for 'Username' and 'Password', a blue 'Log In' button, a checkbox for 'Remember me', and a link for 'Forgot Your Password?'. A red circle highlights the 'Sign Up' link at the bottom right of the login form, with a red arrow pointing to the right screenshot. The right screenshot shows the sign-up page, also with the 'Opus' logo at the top. The sign-up form includes fields for 'First Name', 'Last Name', 'Username', 'Email', 'Password', and 'Confirm Password', and a blue 'Sign Up' button at the bottom.

The Epilogue Support team uses a software tool to manage issues and enhancements.

In order to log and manage your cases, you'll need to create an account. *This is not the same as your Opus credentials.*

## PRO TIPS:

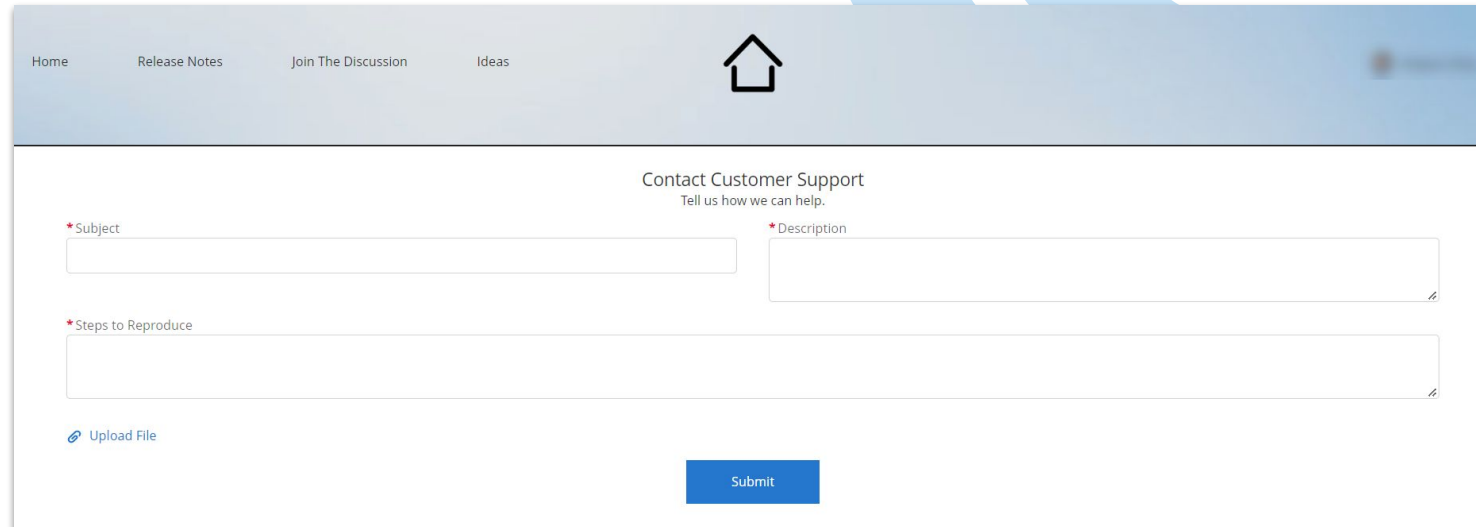
- Username should be your work email address.

# CREATE A CASE IN THE SUPPORT PORTAL

**Provide as many details as possible** to allow the Epilogue Support team to troubleshoot efficiently.

## PRO TIPS:

- Provide the **name of affected documents, projects, users, which browser you're using, target application**, etc
- Let the team know if this **affects a deadline or is blocking a project (+date)**.
- If this is a **request for new functionality**, begin the subject line with "Enhancement:"
- Provide **steps to reproduce** the issue you experienced.



The screenshot shows a web form titled "Contact Customer Support" with the subtitle "Tell us how we can help." The form is set against a light blue header with navigation links: Home, Release Notes, Join The Discussion, and Ideas. A home icon is centered in the header. The form fields include:

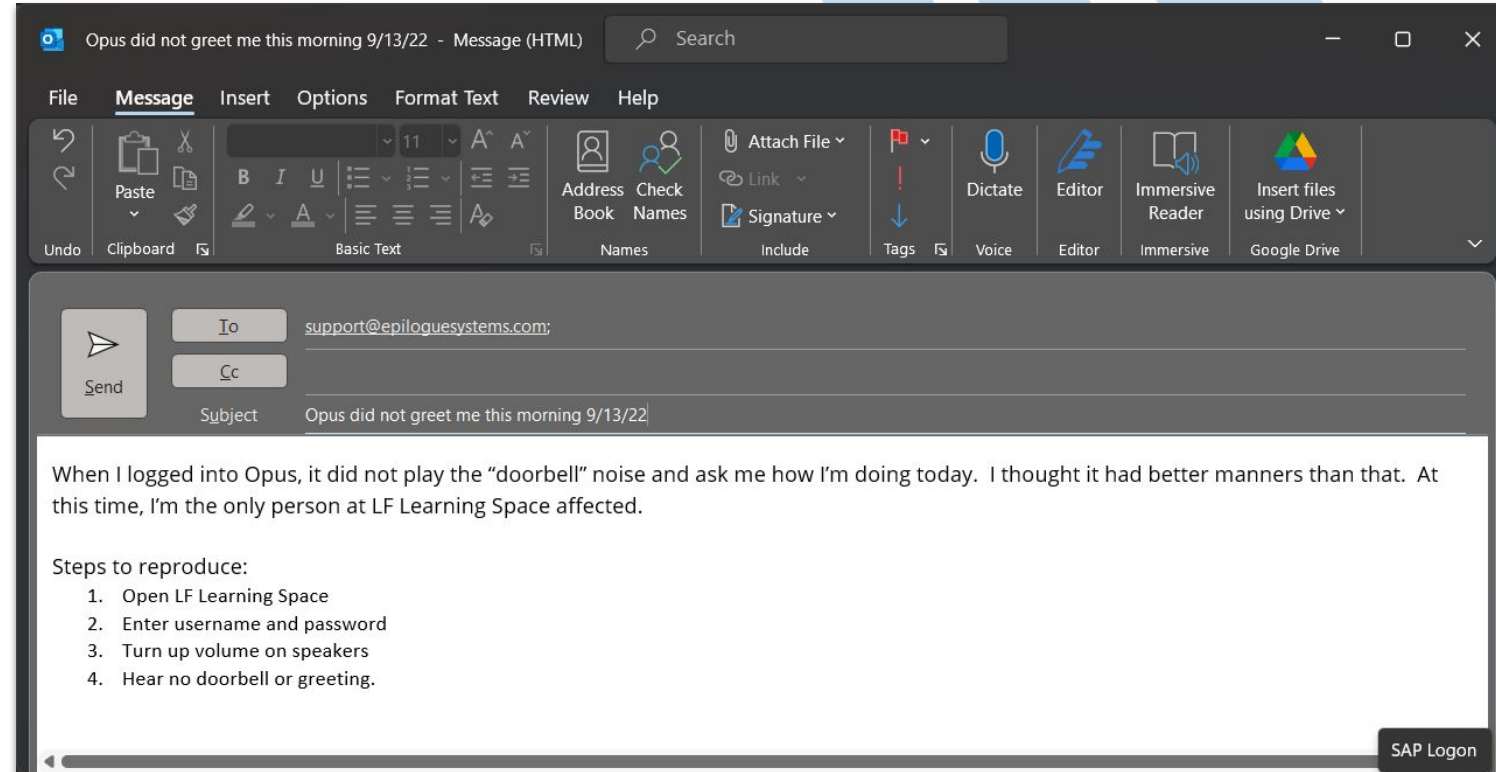
- \*Subject: A text input field.
- \*Description: A larger text area with a scroll bar.
- \*Steps to Reproduce: A text area with a scroll bar.
- Upload File: A link with a paperclip icon.
- Submit: A blue button.

# CREATE A CASE VIA EMAIL

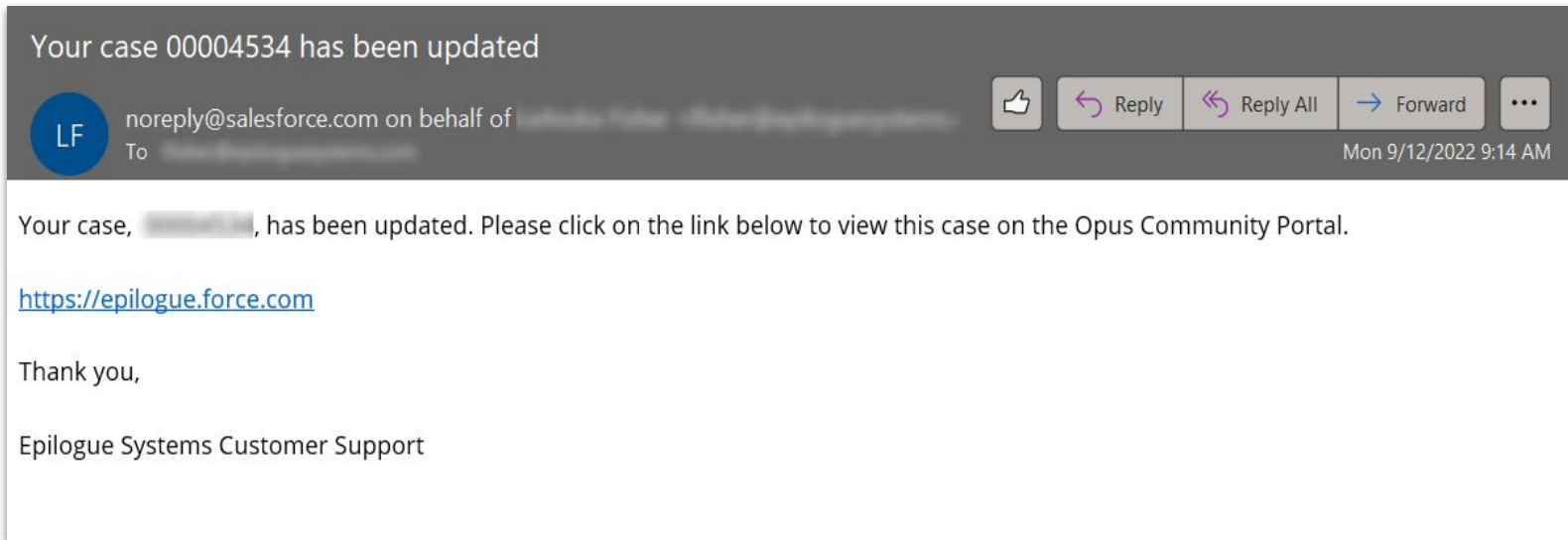
Email: [support@epiloguesystems.com](mailto:support@epiloguesystems.com)

## PRO TIPS:

- Provide the **name of affected documents, projects, users, which browser you're using, target application**, etc
- Let the team know if this **affects a deadline or is blocking a project (+date)**.
- If this is a **request for new functionality**, begin the subject line with "Enhancement:"
- Provide **steps to reproduce** the issue you experienced.



# CASE NOTIFICATIONS



When your case receives an update, an **email is generated and sent to you.**

A **link to the case** is available in the email for you to visit the Support Portal and learn more.

## PRO TIP:

- Hitting “reply” on an email does not update your case. It only creates a separate case.

# UPDATE YOUR CASE IN THE SUPPORT PORTAL

The **Comments and Attachments tab** for your case will allow you to respond to the Support Team.

By clicking on the dropdown arrow, you'll be able to **add a new comment**.

Scroll to the bottom of the screen to **upload a screenshot or video**. (This is also available on the Case Details tab.)

Case Details **Comments and Attachments**

Case Comments (2)

**New**

Public:  9/16/2021 3:15 PM  
Created Date: 9/16/2021 3:15 PM  
Comment: Currently only Project Admins can publish. This behavior shouldn't change. But we should introduce an Unpublish button to the left of "Edit this Content" button. This would only be visible if

- 1. User is Project Admin
- 2. Task is Published

Clicking this should move the Task state to FINAL REVIEW  
In Content Manager, the published document will now show as Unpublished

Please let me know if this makes sense and will work for NHA.

Public:  9/7/2021 6:48 PM  
Created Date: 9/7/2021 6:48 PM

Attachments (0) **Upload Files**

Title	Type	Last Modified	Created By
-------	------	---------------	------------

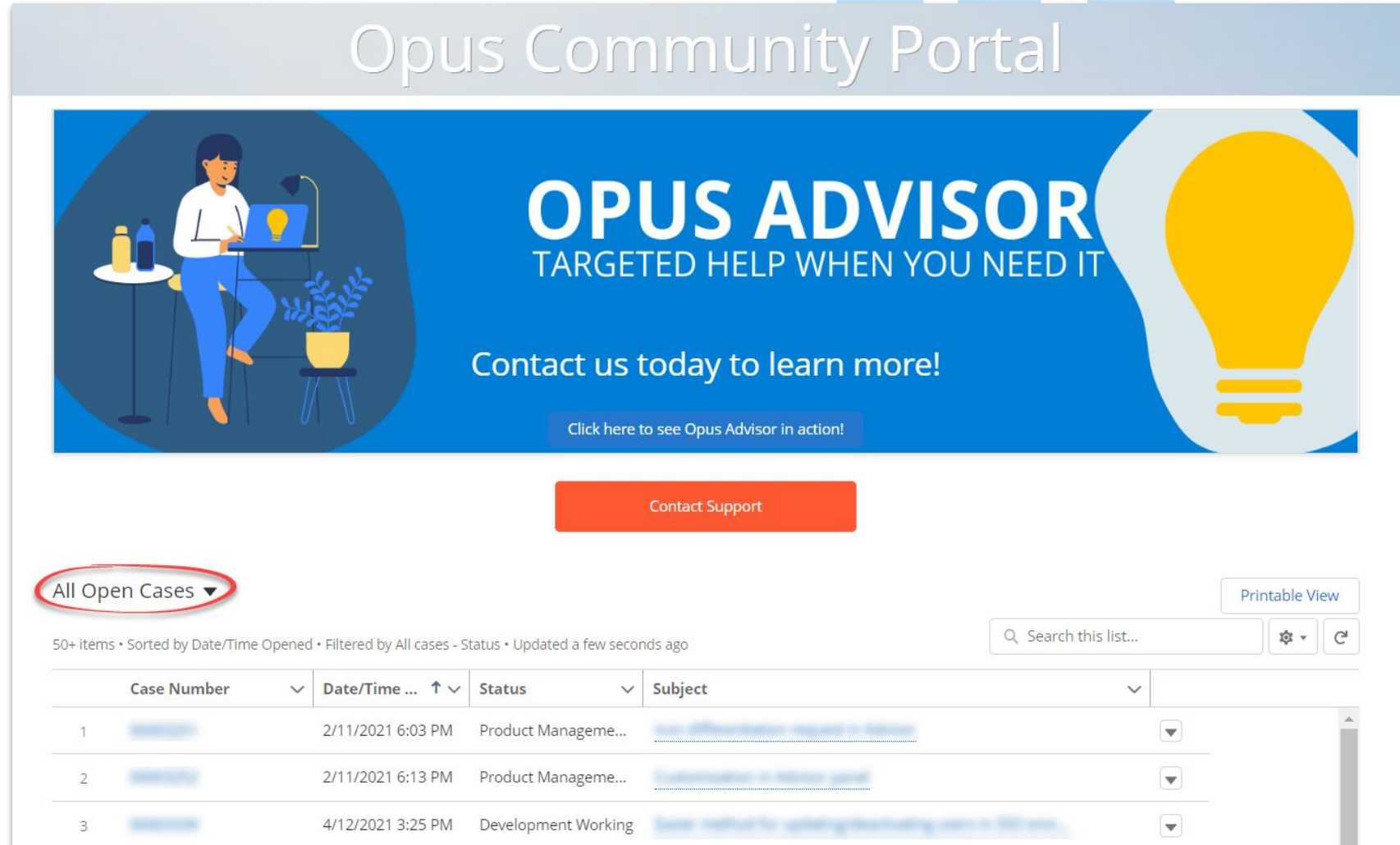


# MANAGING YOUR ORGANIZATION'S CASES

Your Community Portal homepage **shows just your cases by default.**

Use the dropdown arrow to **see all of your organization's open cases** by selecting "All Open Cases."

There is also a **Printable View** of all cases.



The screenshot displays the Opus Community Portal homepage. At the top, the text "Opus Community Portal" is visible. Below this is a large blue banner for "OPUS ADVISOR" with the tagline "TARGETED HELP WHEN YOU NEED IT" and a yellow lightbulb icon. A call to action says "Contact us today to learn more!" with a button that says "Click here to see Opus Advisor in action!". Below the banner is an orange "Contact Support" button.

Below the banner, there is a dropdown menu labeled "All Open Cases" (circled in red) and a "Printable View" button. A search bar contains the text "Search this list...". Below the search bar, there is a table of cases with the following data:

Case Number	Date/Time ...	Status	Subject
1	2/11/2021 6:03 PM	Product Manageme...	...
2	2/11/2021 6:13 PM	Product Manageme...	...
3	4/12/2021 3:25 PM	Development Working	...

# HELP RESOURCES

## CUSTOMER SUPPORT

- [Epilogue Support Portal](#)
- Opus Technical Support link on your Opus Dashboard
- Epilogue Community option on your Opus account menu
- Email [support@epiloguesystems.com](mailto:support@epiloguesystems.com)

- Email your Customer Success Manager directly
- Email the Customer Success team at [customersuccess@epiloguesystems.com](mailto:customersuccess@epiloguesystems.com)

## CUSTOMER SUCCESS