Kaltura Customer Care Portal User Guide

This guide presents the functionality of the Kaltura Customer Care Portal, and describes how to create and track technical support cases. This guide also explains Customer Care workflows and Severity classifications, which are designed to allow swift response times and maximize customer satisfaction.

This guide is intended for users who were granted access to the Kaltura Customer Portal and therefore can open cases and correspond with Kaltura’s Customer Care. The number of allowed users is determined by your account’s service package. Requests for additional users should be submitted to your Kaltura Customer Success Manager.

We recommend that you subscribe to the following relevant Kaltura pages:

- **Product Release Notes** – receive bi-monthly emails for Product deployments and new releases.
- **System Status Page** – receive real-time emails for critical issues affecting the Kaltura platform.
- **KME System Status Page** – receive real-time emails for critical issues affecting the Kaltura Meeting Experience platform.

Contact Us: Please send your documentation-related comments and feedback or report errors to knowledge@kaltura.com. We are committed to improving our documentation, and your feedback is important to us.

Overview of the Kaltura Customer Portal

The Kaltura Customer Portal provides the following functionality:

- Centralized management for all your Customer Care cases
- Transparency regarding case status and severity
- Homepage for Customer Care-related correspondence
- Access to an integrated knowledge center, featuring best practices, FAQs, and troubleshooting guides.

Severity Levels

Kaltura will assign a level of Severity to each Customer Care case that is created. Customers have the opportunity to recommend a Severity level when creating a case on the Customer Care portal.

Severity is an objective categorization of the technical impact of the issue, question or request. Because Severity is based on the technical impact, the Severity of your case...
Kaltura also manages an internal field called **Priority**. This field is used to better address your business needs. Priority is **subjective** and based on the information you provide.

You can influence the **Priority** field by including your specific business needs when creating a case on the Portal. For example: timelines or deadlines, information on how the issue or question affects your specific workflow, how the request is related to a project, etc. If such information is not provided, then the default **Priority** level will be the same as the **Severity** level.

**Information to Provide for Severity/Priority**

When creating a case for Customer Care, you can help set the correct level of Severity and Priority by providing relevant information such as:

- Priority factors such as: business deadlines, workflow impact, role of the user/s, etc.
- Severity factors such as:
  - Number of users affected
  - Scope of impact (e.g. 1 player vs. all players)
  - Degraded performance vs. application unavailable
  - When did the issue begin?
  - Steps to replicate the issue
  - Version (e.g. Player version, LTI or KAF version, etc.)
  - Copy/paste of error strings from MediaSpace
  - Logs – *please refer to the Reference Articles.*

**Severity Definitions**

**Cloud Availability**

The problem relates to the system-wide availability of Kaltura’s hosted services. For real-time updates about the Kaltura platform, please subscribe to the Kaltura System Status Page.

**Essential (S1)**

An Essential Severity S1 should be opened when and if the Kaltura platform is unavailable for all your users. Additionally, Essential includes an outage to at least one of the following Critical Services.

**Critical Services**

- video playback
ability of all users to log-in to Kaltura MediaSpace (KMS)
ability of all users to access Kaltura Webcasting or Kaltura live streaming services
Kaltura APIs are unavailable and consistently returning errors for API calls, and were previously accessible

High (S2)

High Severity includes a Degraded performance of a Critical Service. A workaround may be provided until the issue can be corrected.

Additionally, High Severity includes an outage to at least one of the following services:

**Kaltura Services**

- media uploads, imports and transcoding
- transcription and captioning services
- ability of all users to log-in to the Kaltura Management Console (KMC)
- Kaltura Analytics

Medium (S3)

Medium severity includes an issue or request that has a moderate impact on customer’s business, operations, or workflow. Includes degraded performance of Kaltura services listed in S2.

Additionally, Medium Severity includes:

- impact on a minimal number of users
- involves a single application or component, with moderate to minimal impact

Low (S4)

An issue that does not directly impact customer’s business or operations. For example, an issue in the user interface that does not impact the underlying functionality.

Additionally, Low severity includes:

- questions about service capabilities
- questions about custom configurations
- problems that impact only a single known user
- feature requests

**Customer Care Case Statuses**
Case Status

Use the ‘Create New Case’ button to open your case with Kaltura Customer Care (see detailed instructions under *Getting Started*). Once the case has been created, it may be in any of the following three statuses:

**Open Case Statuses**

- **New** - your case was received and is pending investigation.
- **In Progress** - the case is currently under investigation by a Kaltura Support Engineer,
  - This status is also used when the issue has been identified and a ticket has been created another team for investigation, resolution or deployment (including escalations to Engineering, Professional Services, or your Customer Success Manager).
- **Pending Your Response** - A Kaltura Support Engineer has replied to the case and is awaiting your response.
  - After 5 days in this status, an automatic reminder email will be sent to you.
  - After 10 days without your reply, an email will be sent to you and the case will be automatically closed. (See how to re-open a case.)

**Closed Cases**

- **Closed** – after the case has been resolved and closed.
  - Cases can be re-opened by replying to the case within 7 days after it is closed. After 7 days you will need to create a new case.
  - Closed cases can be seen by navigating to “View All” and selecting “My Closed Cases” -- please see the Cases tab in the *Customer Care Portal Tabs* section.
  - Although cases can only be closed by Customer Care, customers can suggest closing a case by clicking the relevant button inside the case detail view.

**NOTE:** After clicking on a specific Case Number to view the case details, you can “Recommend to Close” a case by clicking the buttons at the top of the case detail page.

**Getting Started**
2. Log in using the credentials in the “Welcome to Kaltura Customer Portal” registration email you received. The Customer Care Portal is displayed:

3. From here you can select whether to Search for Answers according to specific products or Create a New Case.

Creating a Case with Customer Care

Creating a New Case

- Click the Create New Case button in one of the following locations:
  - On the homepage
  - In the Cases tab
New Case Fields

In the **Case Information** section, enter the details of your case:

- **Account Name** - If your Kaltura account configuration has multiple accounts, then choose the account that relates to this case.
- **Case Type** - Define your case as a Feature Request, How-To question, or Technical Issue.
- **Severity** - Define the technical impact of the reported issue, according to the [Severity Definitions](#).
- **Subject** - Describe the issue or request in a short sentence. This will be the email subject of the email that is sent to your inbox.
- **Description** - This is the main description of the issue. Customer Care will use the details provided here for the investigation and to set the Severity and Priority classification. Please provide as much information as possible, including:
  - Copy/paste of error message strings
  - Specific IDs for entries, players, etc.
  - Version (e.g. Player version, LTI or KAF version, etc.)
  - When did the issue begin? Did it ever work before or is this a new setup?

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Recent changes to your environment e.g., browser upgrade, player update, firewall installation) that are related to the issue.

Steps to replicate the issue, including actions or clicks that you took leading up to an error response.

Impact to your workflow i.e., if any other users are experiencing the same issue and/or number of users affected.

Scope of impact (e.g., 1 player vs. all players)

What result or goal that you are trying to achieve? (so a workaround can be provided)

Timelines or deadlines for this issue or related project

 Logs – please refer to the Reference Articles.

- **Product** – select the product that is affected.
- **Feature** – select the sub-feature that is affected.

**Steps to Reproduce**

In the **Steps to Reproduce** section, please provide the following details:

- **Kaltura Partner ID Related to Case** – The “PID” (Partner ID) for the account. PID is the Kaltura Account ID number. If you have multiple accounts and/or instances, such as a production and staging account, please provide the PID for the account where you are seeing this issue.
  - If you are seeing an issue across multiple PIDs, please include these PIDs in the Description section above.

- **Case Example Link** - This is a link to a page where the reported behavior appears. For example, a test page, your website, etc.

- **Steps to Reproduce** - If you didn’t provide steps in the Description, please provide the steps to see the issue here. Customer Care will attempt to reproduce the issue using your instructions.

- **Login credentials** - Optional. If you would like us to be able to replicate the issue on your KMS instance, or your staging KMS instance, please provide a test username & password. These credentials will be transmitted securely via the Salesforce Cloud over SSL.

**Contact Information**

In the **Contact Information** section, please provide the following details:

- **Contact Name** - By default, this field is populated with the name of the user who logged in.
Alternately, if you are opening a case on behalf of a different user in your account, click the magnifying glass icon on the right-hand side of this field, and choose the contact’s name.

- **Phone Number** – a phone number where we can reach you with questions about your case.

### Additional Contacts

In the **Additional Contacts** section enter the following:

- **Email CC #1 - #5** – You can copy up to 5 email addresses on a case. List the email addresses of other contacts in your organization here, and they will be copied on the case email thread.

### Case Replies

Once the case has been created on the Portal, you can reply to the case in two ways:

- Login to the Portal and click on the Case Number. Post a comment on the case.
- You will receive case responses via email from customercare@kaltura.com. You may reply via email. Your reply will be posted as a comment on the case.

**NOTE:** Please note cases may **not** be created by email. Cases may only be created by logging into the Portal.

### Searching for Answers

The Customer Care Portal includes a widget to Search for Answers in the Kaltura Knowledge Center Data Base.

To Search for Answers

1. After you login to the Customer Care Portal, select Search for Answers.
A menu is displayed with the list of Kaltura products that you can select and browse through the articles relevant to each product.

2. If you are looking for specific information, enter the search term in the Search field. The relevant results are rendered and you can look through the articles to find answers before opening a case.

3. Otherwise, check the product name and scroll through to the relevant articles to find your information.

**Escalating a Case**

**Case Escalations**

At certain points in a case lifecycle, there may be a need to request expedited handling or to inform Customer Care that the Severity or Priority of a case has increased. This can be done by replying to the case at any time. If you don’t receive a reply to that follow-up within the necessary timeframe, and need to request additional attention, there is an option to “escalate” a case.

1. Within the Customer Care portal, click on a case number. The case details are displayed on a new page.

2. Scroll down to the Case Escalation section.

3. Fill out/check the following fields:

   - **Escalated** – Click the checkbox for Escalated (checkbox is required to trigger the
flow)

- **Reason for Escalation** - Hover on the right side of the field to reveal the pencil icon. Double-click the pencil icon to edit. Then select the reason for your escalation from the dropdown:
  - *Case Update Needed*
  - *Quality of Investigation*
  - *Prolonged Resolution Time*
  - *Technical Scope Increased*
  - *Priority for Customer Organization*
  - *Requesting Management Attention* - Note: This value skips the Customer Care Engineer and goes directly to Management. Please choose this only if you have not received a response on a prior escalation OR you are not satisfied with the last update about your prior escalation.

- **Reason for Escalation Description** - Hover on the right side of the field to reveal the pencil icon. Double-click the pencil icon to edit. Enter your request (up to 250 characters) to clarify what you need from Customer Care and what has changed (New deadline, etc).

- **Escalated By** - skip. Will be automatically populated.

- **Support Feedback** - locked. Will be updated by Customer Care.

After you escalate the case, you should receive two updates.

1. The first update will be an email from no-reply-escalations@kaltura.com. Please do not reply to this email. The message will contain one of these values indicating when your case will be next updated:
   - Immediately
   - Within the upcoming hours
   - Will be handled within 24 hours

2. The next update will be on the existing case thread and will contain an update on your open request.

**Portal Navigation**

**Customer Care Portal Homepage**

After you have logged in successfully, the portal homepage appears, and contains the following four areas:

- Navigation (red box)
Recent Items (blue box)
Main Cases (yellow box)
Knowledge and Documentation (orange box)

Customer Care Portal Homepage Tabs

Navigation

Use the Navigation tabs at the top of the page to access the portal’s following areas:

- **Home** – return to the homepage to view an overview of your open cases, recently viewed cases, and links to knowledge-base articles and other documentation.
- **Accounts** – account and contact information.
- **Cases** – provides views for open, closed, or all cases, as well as feature requests.
- **Messages** – provides access to blog posts.

You can also use the *Search* field in the Navigation area to search for cases, accounts, or contacts.

Recent Items

The Recent Items menu on the left side of the home page displays recently viewed items, and enables you to quickly return to recent cases, accounts, and users.
Click on any of the items in the list to view additional details about that case or account.

**Main Cases**

Use the Main Cases area as a quick way to create cases and view your open cases with Customer Care.

Click on “Create New Case” to open the New Case window,

or,

click on a Case Number to navigate to a detailed view of the case, where you can add a comment, review details, or recommend to close the case.

**Knowledge and Documentation**

The Knowledge and Documentation area on the right side of the homepage contains links to Kaltura’s Knowledge Center, which contains product and API documentation and video tutorials.
Portal Tabs

Customer Care Portal Tabs

Accounts Tab

Use the Accounts tab to view sub-accounts that you are related to your organization.

To view sub-accounts

1. Click the arrow next to My Accounts.
2. If you have multiple accounts, choose the account you want to view from the drop-down list.
3. Click GO. Your account information is displayed.

Cases Tab

Use the Cases tab to view the cases created by you or others in your organization,
according to your account’s hierarchy permissions. By default, you are presented with your previously chosen view.

1. Click the arrow next to My Open Cases.
2. A drop-down list opens and the following choice are presented:
   - **All My Cases** – all open and closed cases created by the logged-in user.
   - **My Account’s Open Cases** – all open cases for your account.
   - **My Closed Cases** - all closed cases for your account.
   - **My Open Cases** - all open cases where you are the owner.
3. Select an option from the drop-down and click **GO**.

Messages Tab

There are 2 types of messages in the Messages tab:

- Product Updates
- RCA Repository

Product Updates

The Product Updates section contains links to the monthly Product Newsletter, which highlights recent product enhancements.

**NOTE:** The Newsletter is not the same as product Release Notes, which can be subscribed to here: https://knowledge.kaltura.com/help/release-notes.

RCA Repository
The RCA Repository section contains Root Cause Analysis documents (or “RCAs”) for Severity 1 incidents. Incidents are communicated via our System Status pages; however, RCAs are provided only for Severity 1 incidents.

**Account Hierarchies**

Depending on your organization’s structure, your account can be one of the following types:

- **Parent account** - contains sub-accounts. Sub-accounts often characterize inner relationships of corporations and their departments, universities, consortiums and their academic departments, etc.
- **Sub-account** - has a parent account (The parent account may have more parallel sub-accounts.)
- **Standard account** - stands on its own. It has no parent account or parallel sub-accounts.

**Permissions Matrix**

The following table presents the permissions matrix for the various accounts.

<table>
<thead>
<tr>
<th>Account Type / Functionality</th>
<th>Accounts</th>
<th>Cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent account</td>
<td>View/edit parent account</td>
<td>View/create/edit account and sub-account cases</td>
</tr>
<tr>
<td></td>
<td>View/edit sub-accounts</td>
<td></td>
</tr>
<tr>
<td>Sub-account</td>
<td>View/edit account</td>
<td>View/create/edit account cases</td>
</tr>
<tr>
<td></td>
<td></td>
<td>View/edit parallel sub-account cases</td>
</tr>
<tr>
<td>Standard account</td>
<td>View/edit account</td>
<td>View/create/edit cases</td>
</tr>
</tbody>
</table>

**Customer Care - Log Collection Reference Articles**

The following articles may be useful to reference Kaltura application's log collection information.

- **KMS/KAF:** Collecting Support Logs within Kaltura Applications
- **Kaltura Capture**: How to Collect and Upload the Kaltura Capture Logs
- **Kaltura Meeting experience (KME)**: How Can I Send Logs & Receive Technical Support In Kaltura Meetings?
- **Webcasting**: Export Logs from the Webcasting Producer Application
- **Other applications**: How to Capture Network Traffic Logs for Kaltura Support?