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Case Management Portal Design

- At this time, the Case Management Portal is a private model. This means the customer can only submit and view cases they have created
- Customers will have access to view cases where they are the contact dating back to 2019. This includes any open or closed cases.
- A customer does not have the ability to “reassign” their case to another customer, even if that customer is part of their Account and has access to the Case Management Portal. If a case should be updated with a new contact this can be done by the Collins Case Owner internally

Homepage Navigation

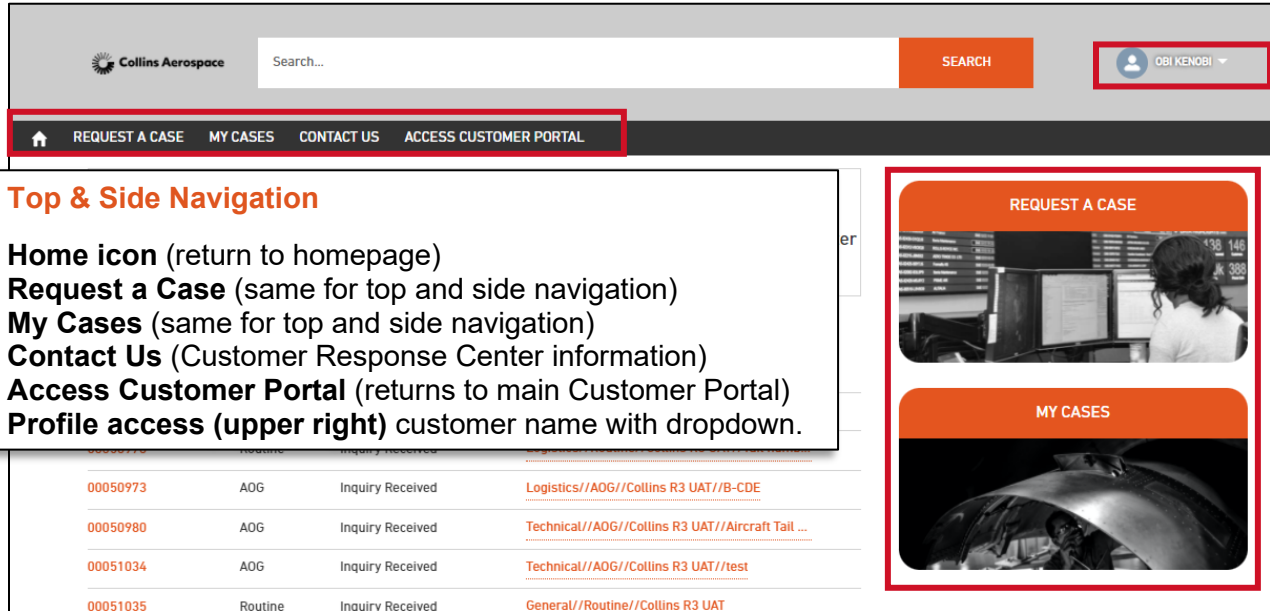
Search



- Enter partial or full case numbers and key words, some suggestions may appear in the dropdown. Click Enter or Search to see all results
- Use left side navigation to filter additionally
- Click a Case Number or Subject to open the case

Search Results		Cases						
All		7 Results • Sorted by Relevance ▼						
Cases		CASE NUMBER	SUBJECT	SHORT DESCRIPTION	PRIORITY	STATUS	DATE/TIME OPENED	DATE/TIME CLO
Expand List		00051050	Technical//AOG//Collins R3 UAT/...	AWIN doc	Event Report	Triage	1/31/2022, 9:33 AM	
		00051034	Technical//AOG//Collins R3 UAT/...	TEST	AOG	Inquiry Received	1/28/2022, 11:05 AM	
		00051045	Technical//Routine//Collins R3 UAT	TEST return to service	Routine	Inquiry Received	1/28/2022, 12:19 PM	
		00051048	Technical//Routine//Collins R3 UAT	testing return to service	Routine	Inquiry Received	1/28/2022, 3:51 PM	
		00051057		TEST CRC	Routine	Case Closure	1/31/2022, 12:36 PM	1/31/2022, 2:...
		00051035	General//Routine//Collins R3 UAT	test other	Routine	Inquiry Received	1/28/2022, 11:11 AM	
		00051056		I need a spare!	Routine	Inquiry Received	1/31/2022, 12:20 PM	

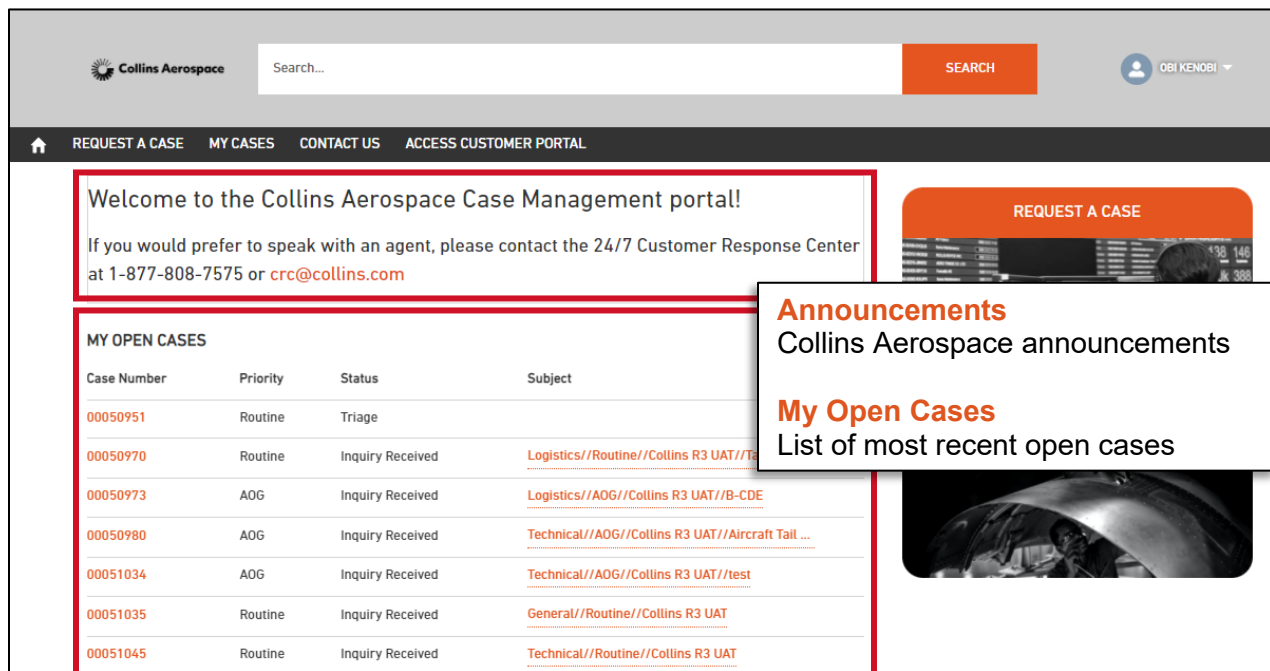
General Navigation



Top & Side Navigation

- Home icon (return to homepage)
- Request a Case (same for top and side navigation)
- My Cases (same for top and side navigation)
- Contact Us (Customer Response Center information)
- Access Customer Portal (returns to main Customer Portal)
- Profile access (upper right) customer name with dropdown.

Case Number	Priority	Status	Subject
00050973	AOG	Inquiry Received	Logistics//AOG//Collins R3 UAT//B-CDE
00050980	AOG	Inquiry Received	Technical//AOG//Collins R3 UAT//Aircraft Tail ...
00051034	AOG	Inquiry Received	Technical//AOG//Collins R3 UAT//test
00051035	Routine	Inquiry Received	General//Routine//Collins R3 UAT



Welcome to the Collins Aerospace Case Management portal!

If you would prefer to speak with an agent, please contact the 24/7 Customer Response Center at 1-877-808-7575 or crc@collins.com

Announcements
Collins Aerospace announcements

My Open Cases
List of most recent open cases

Case Number	Priority	Status	Subject
00050951	Routine	Triage	
00050970	Routine	Inquiry Received	Logistics//Routine//Collins R3 UAT//T...
00050973	AOG	Inquiry Received	Logistics//AOG//Collins R3 UAT//B-CDE
00050980	AOG	Inquiry Received	Technical//AOG//Collins R3 UAT//Aircraft Tail ...
00051034	AOG	Inquiry Received	Technical//AOG//Collins R3 UAT//test
00051035	Routine	Inquiry Received	General//Routine//Collins R3 UAT
00051045	Routine	Inquiry Received	Technical//Routine//Collins R3 UAT

00051048	Routine	Inquiry Received	Technical//Routine//Collins R3 UAT
00051050	AOG	Inquiry Received	Technical//AOG//Collins R3 UAT//123456

Footer
 Links to main customer portal, case management portal training materials and access to Raytheon privacy policies

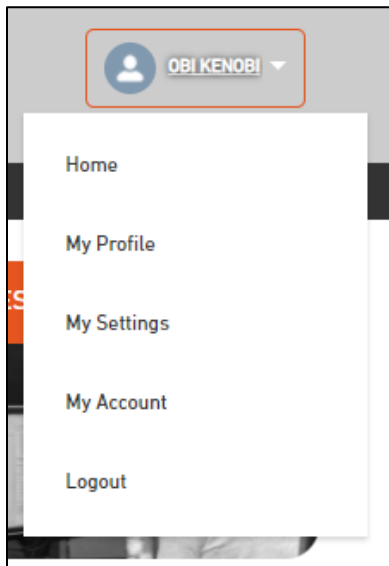
Access Customer Portal - Case Management Training

To read about the Raytheon Technologies privacy policies, click [here](#).

Collins Aerospace © 2022

Profile

Customer can click the drop-down under their name to access some additional information and settings. Most of the information within their profile drop-down cannot be altered.



- Home** – Return to homepage
- My Profile** – General information
- My Settings** – Time zone and notification settings (see more detail below)
- My Account**- General information
- Logout** – Logout of Case Management Portal

My Settings: Time Zone Update

BEST PRACTICE: Navigate to My Settings to update your Time Zone. This ensures that all time stamps seen on the case will be in the customer's zone. Be sure to click Save.

My Settings

ACCOUNT DETAILS

Account

Username
obiwan@collins.prod.uat

Email Address *

Password
[Change Password](#)

Location

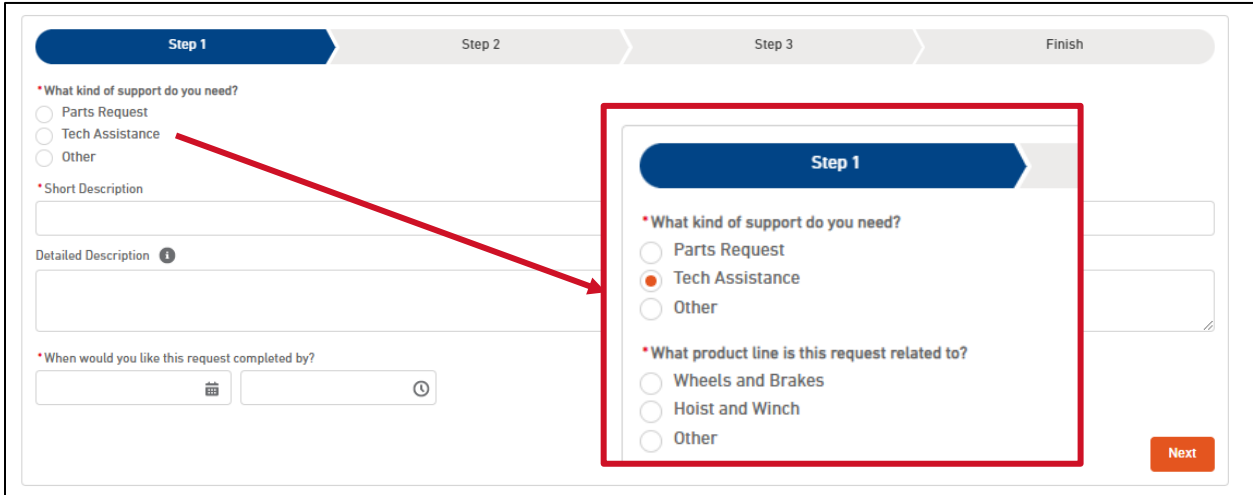
Language

Locale

Time Zone

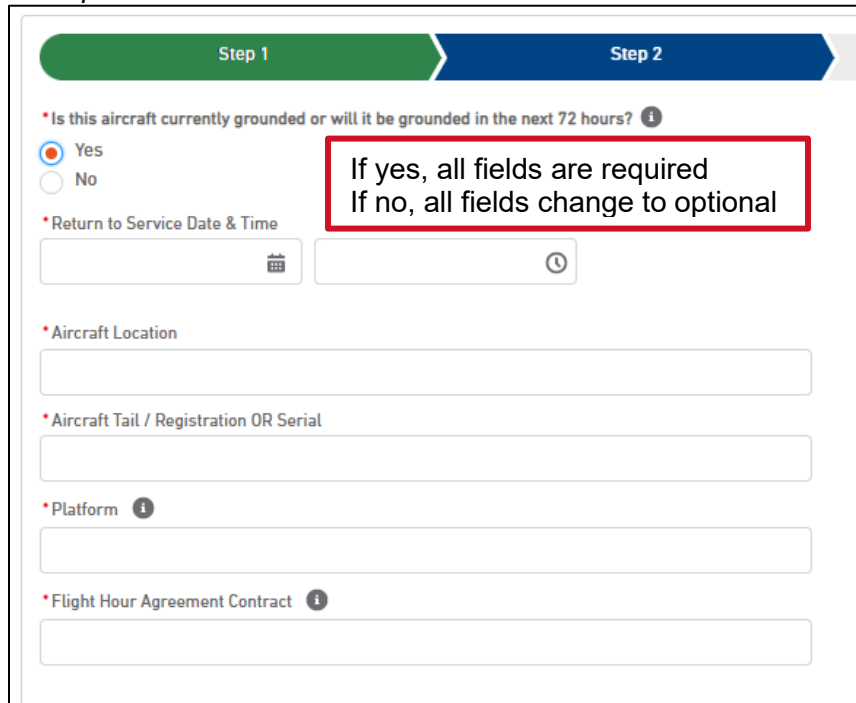
Request a Case

1. Click **Request a Case** either in the top or side navigation.
2. Choose the type of support needed: Part Request, Tech Support or Other.
 - If Tech Assist is chosen, the product line will need to be chosen as well.



3. Complete all required fields and provide as much information as possible.
 - The Short Description is limited to 25 characters. Include a longer description in the Detailed Description field.
 - **If you have not already updated your time zone, please be sure to do this now.** See the section on [My Settings: Time Zone Update](#)
 - Include the expected Return to Service date and time (with your time zone indicated) in the **Detailed Description**. This ensures the Collins Team stays informed of the immediacy.
4. Click **Next** to move to Step 2.
5. Answer if the aircraft is currently grounded or will be grounded in the next 72 hours. Fields will dynamically adjust depending on choice and type of support needed.

Parts Request example



Step 1 **Step 2**

* Is this aircraft currently grounded or will it be grounded in the next 72 hours? ⓘ

Yes
 No

* Return to Service Date & Time

* Aircraft Location

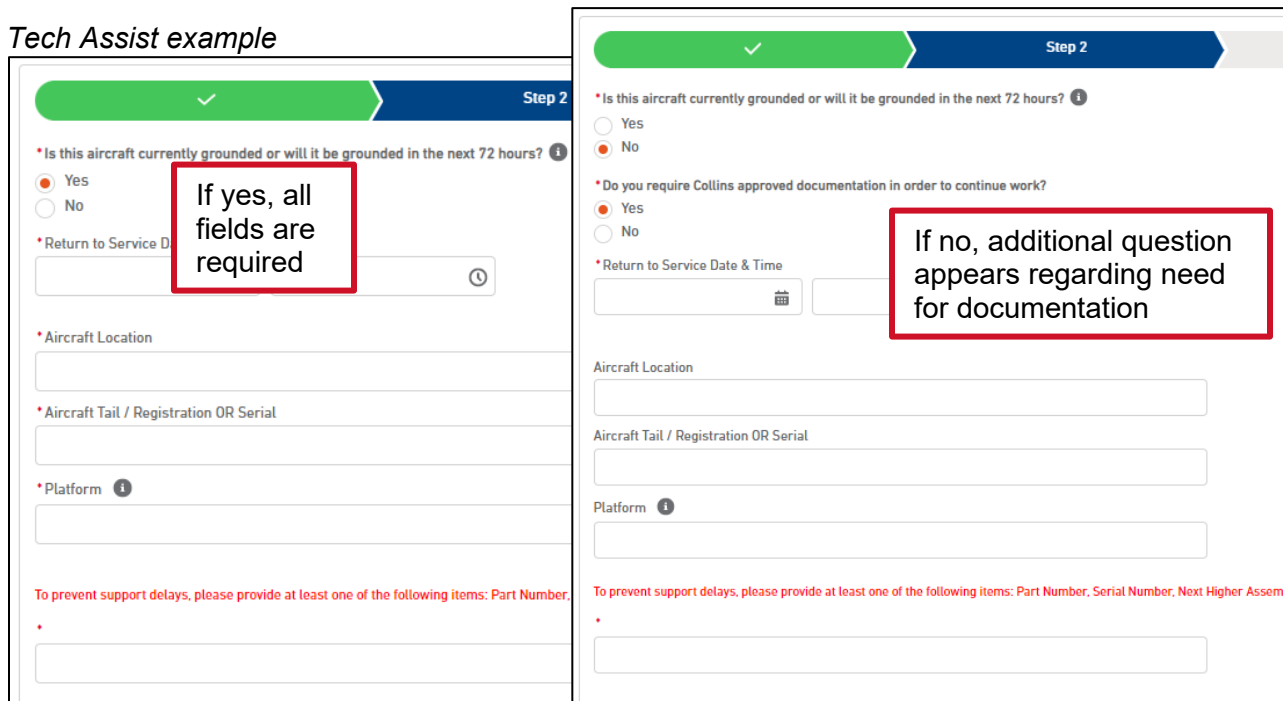
* Aircraft Tail / Registration OR Serial

* Platform ⓘ

* Flight Hour Agreement Contract ⓘ

If yes, all fields are required
 If no, all fields change to optional

Tech Assist example



Step 2 **Step 2**

* Is this aircraft currently grounded or will it be grounded in the next 72 hours? ⓘ

Yes
 No

* Do you require Collins approved documentation in order to continue work?

Yes
 No

* Return to Service Date & Time

* Aircraft Location

* Aircraft Tail / Registration OR Serial

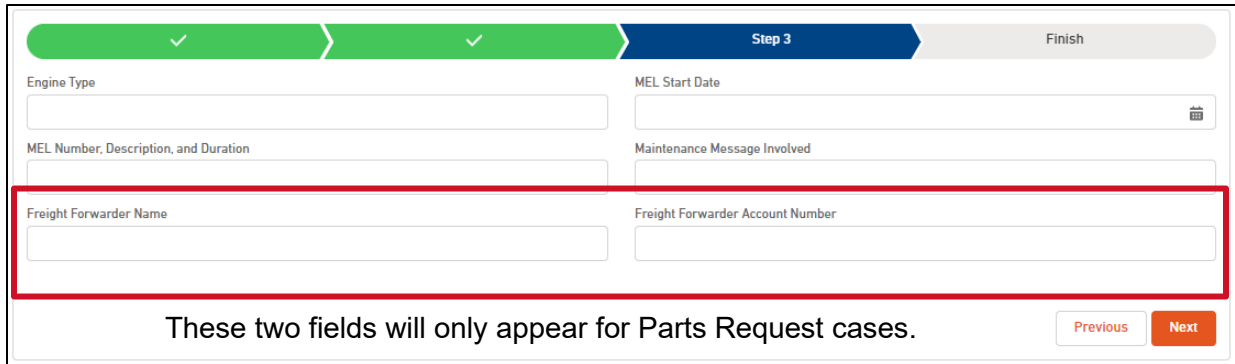
* Platform ⓘ

To prevent support delays, please provide at least one of the following items: Part Number, Serial Number, Next Higher Assembly

If yes, all fields are required

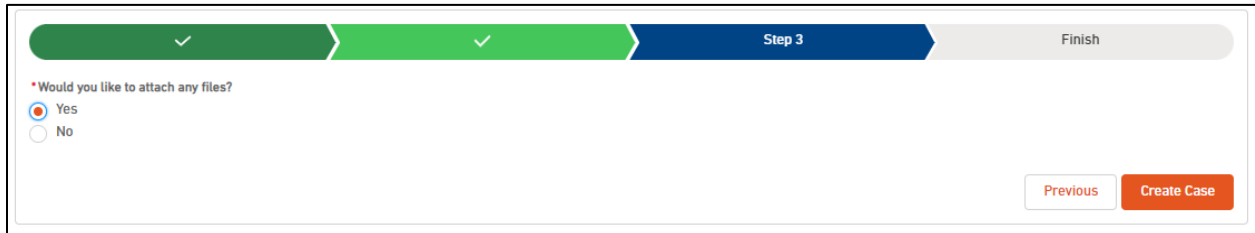
If no, additional question appears regarding need for documentation

6. Click **Next** to move to Step 3.
7. Complete as many fields as possible, these will not be required

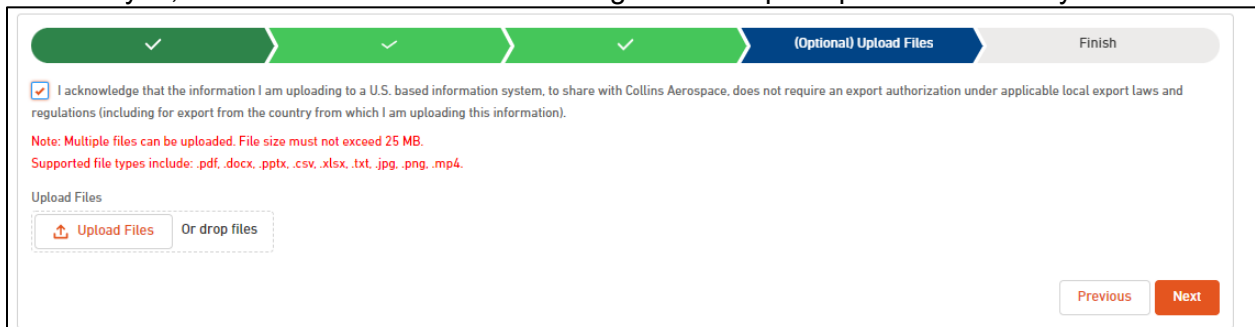


These two fields will only appear for Parts Request cases.

8. Click **Next**. The form will remain on Step 3
9. The customer has the option to attach file(s) associated with the case
 - If no, click Create Case button

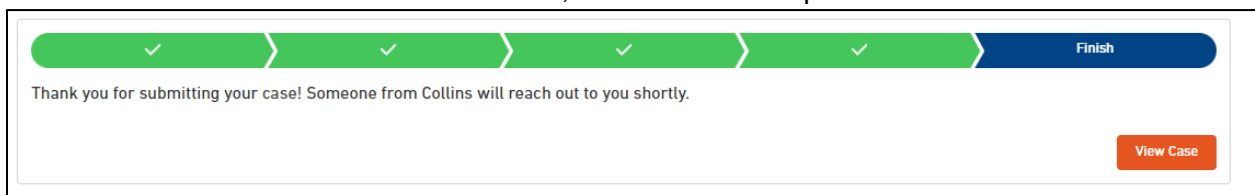


10. If yes, customer must check acknowledgement to open upload functionality



Note: Multiple files can be uploaded. File size must not exceed 25 MB
 Supported file types include: .pdf, .docx, .pptx, .csv, .xlsx, .txt, .jpg, .png, .mp4

11. Drag and drop multiple files or click Upload Files to browse
12. Uploader will run, click **Done**.
13. The file will not show in this window, click **Next** to complete case and submit.



14. Click **View Case** to view opened case

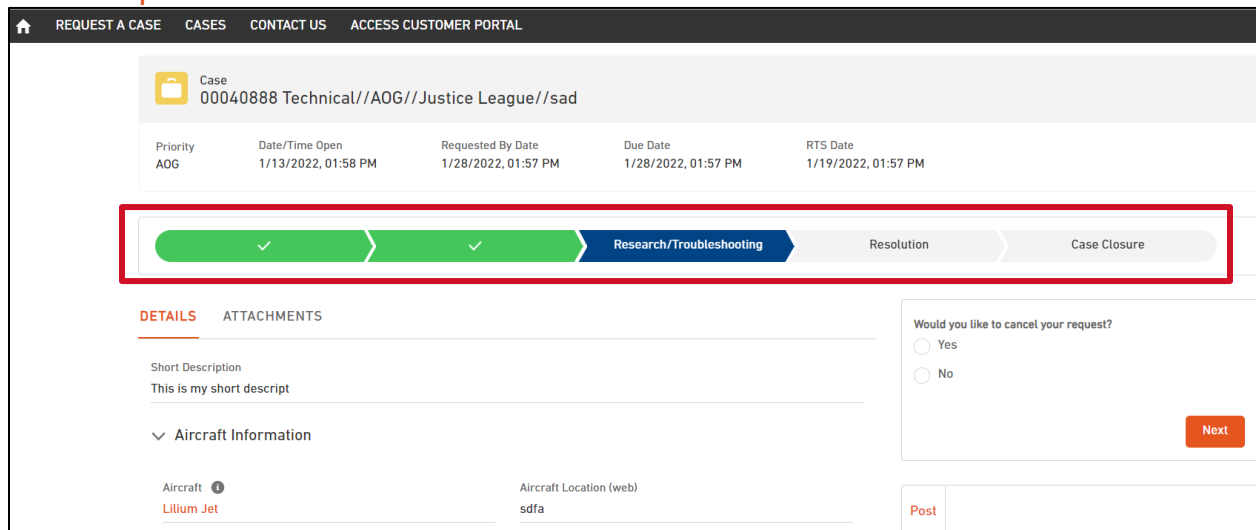
“Other” Case Requests

- When a customer chooses “Other” as the type of support needed, they will only complete Step 1 and Step 3 before submitting the case.
- The General Case will typically update to a new record type after the Collins Team has accessed the inquiry. This could update to Customer (Customer Case), Technical (Technical Case) or Logistic (Parts Request) depending on the assessment and collaboration with the customer.

Manage Cases

Once a case has been created, the customer cannot change any of the fields they have completed. There are some items that can be used to continue to manage their case and communicate with the Collins Team working their case.

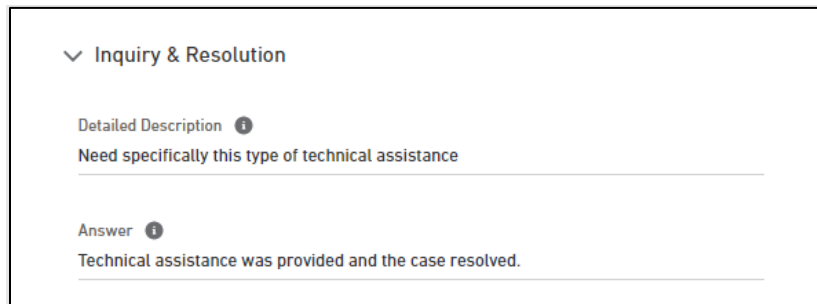
Status Updates



- As the Collins Team works the case when the status is updated internally this will also update in real time on the customer case in the case management portal.

Case Resolution

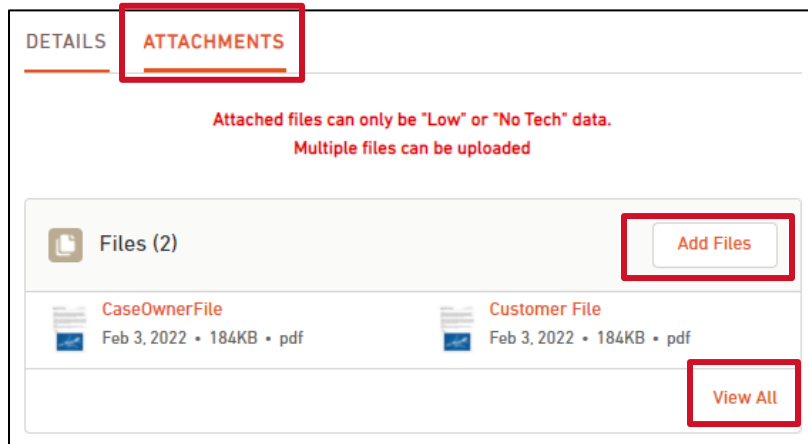
As the case is being worked by the Collins Team, customers may see new fields appear as they are populated. For Technical Cases, when resolved, the **Answer** field will appear under the Inquiry & Resolution section on the case.



Add & View Attachments





Customers can add attachments at any time. They can also access files shared with them from the Collins Team.

1. In the case, click on the **Attachments** tab
 - Any files associated with the case will be listed under Files
2. Click **Add files** to add more files
3. Click **View All** to see more information related to the files (such as Owner which indicates who uploaded the file – customer or Collins Team).



Cases > 00051136
Files

2 items • Sorted by Last Modified • Updated a few seconds ago

	Title	Owner	Last Modified	Size	Source	
1	 CaseOwnerFile	Amy Ashlock	2/3/2022, 7:54 AM	184KB	 00051136	▼
2	 Customer File	Obi Kenobi	2/3/2022, 7:29 AM	184KB	 00051136	▼

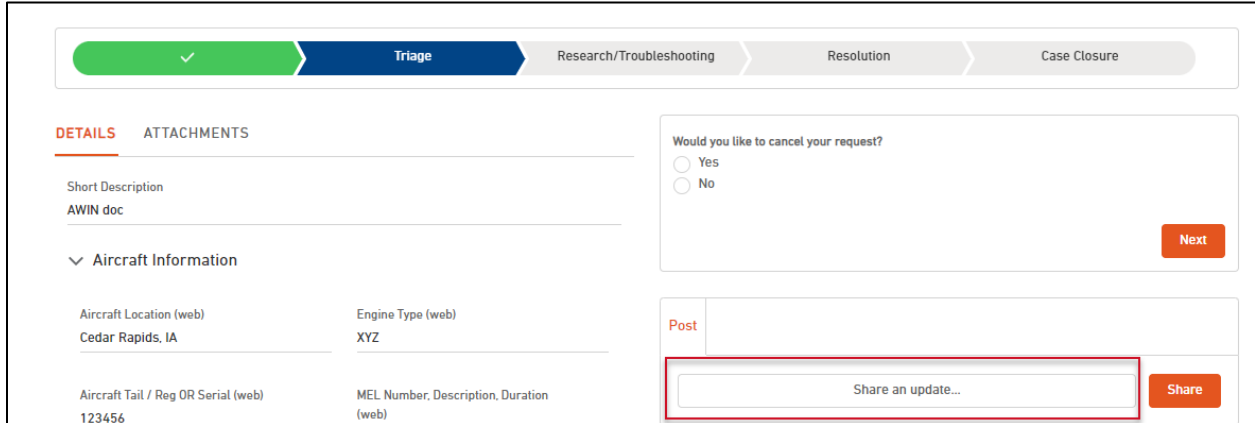
Have an updated version of the same file?

Click the drop-down arrow next to the file (you must be the owner), click **Upload New Version** and it will overwrite the existing version.

Post & View Messages on a Case

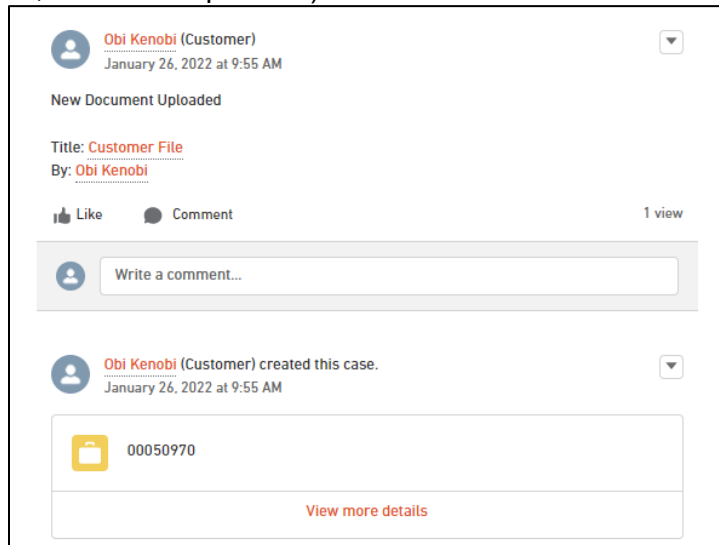
Customers can post a message to their case that the Collins Team will be able to see internally as they work the case. As well, Collins Team members can post to the case to share a message the customer can view. **PLEASE NOTE: THIS IS NOT A LIVE CHAT.**

- Under Post: Click in the **Share an update** field to open rich text box.



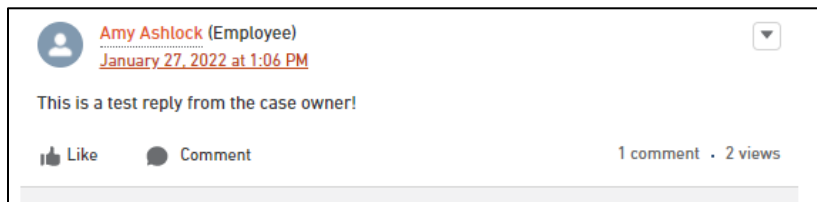
The screenshot shows a case management interface with a progress bar at the top: Triage (active), Research/Troubleshooting, Resolution, and Case Closure. Below the progress bar are tabs for 'DETAILS' and 'ATTACHMENTS'. The 'DETAILS' tab is active, showing a 'Short Description' field with 'AWIN doc' and an 'Aircraft Information' section with fields for 'Aircraft Location (web)', 'Engine Type (web)', 'Aircraft Tail / Reg OR Serial (web)', and 'MEL Number, Description, Duration (web)'. On the right side, there is a 'Would you like to cancel your request?' section with 'Yes' and 'No' radio buttons and a 'Next' button. Below that is a 'Post' section with a text input field labeled 'Share an update...' and a 'Share' button. The 'Share an update...' field is highlighted with a red border.

- Type the message and click Share
- This message will show in the feed with customer name (Customer)
 - The feed will also have some automatic system updates for certain actions (Case created, document uploaded).



The screenshot shows a case feed with two entries. The first entry is from 'Obi Kenobi (Customer)' on January 26, 2022 at 9:55 AM, titled 'New Document Uploaded'. It includes a 'Title: Customer File' and 'By: Obi Kenobi' and has 'Like' and 'Comment' buttons with '1 view' shown. Below the entry is a 'Write a comment...' input field. The second entry is a system update from 'Obi Kenobi (Customer)' on January 26, 2022 at 9:55 AM, stating 'Obi Kenobi (Customer) created this case.' It includes a document icon and the number '00050970' and a 'View more details' link.

- When someone from the Collins Team posts a message to a case, their post will show as Employee Name (Employee).

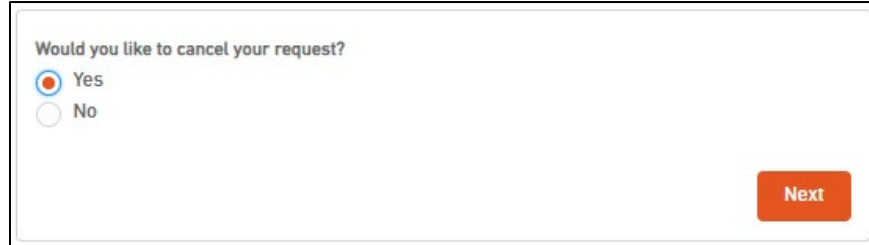


The screenshot shows a case feed with one entry from 'Amy Ashlock (Employee)' on January 27, 2022 at 1:06 PM. The message says 'This is a test reply from the case owner!'. It has 'Like' and 'Comment' buttons and shows '1 comment · 2 views'.

Cancel a Case

Customer can cancel their case at any time.

1. Click **Yes** for Would you like to cancel your request box, click **Next**

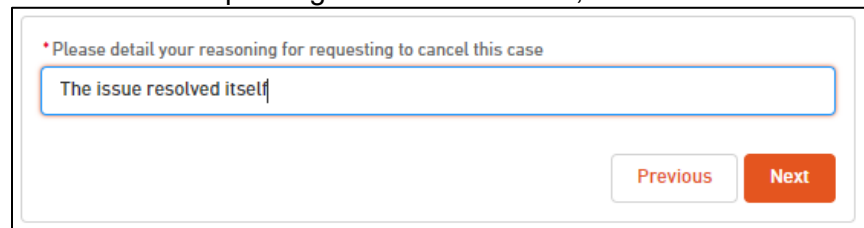


Would you like to cancel your request?

Yes
 No

Next

2. Provide a reason for requesting to cancel this case, click **Next**



*Please detail your reasoning for requesting to cancel this case

The issue resolved itself

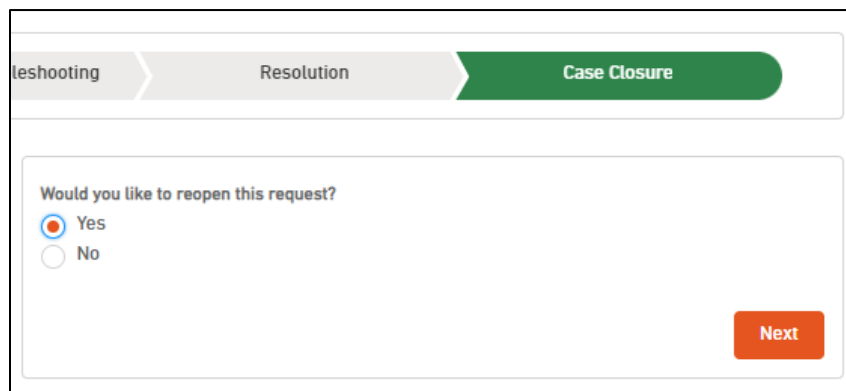
Previous Next

Customer may need to refresh their page and status will update to Case Closure

Request a Case be Re-opened

Customer can request to have a closed case be re-opened.

1. Click Yes for would you like to reopen this request, click Next.



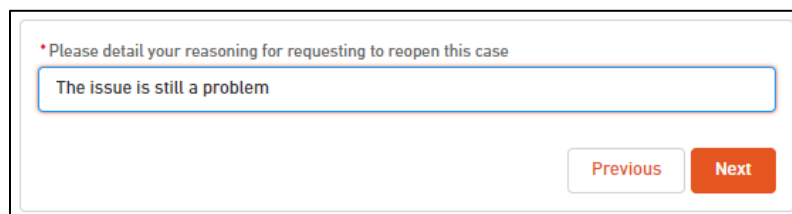
Shooting Resolution Case Closure

Would you like to reopen this request?

Yes
 No

Next

2. Provide reason for requesting to reopen the case, click Next.



*Please detail your reasoning for requesting to reopen this case

The issue is still a problem

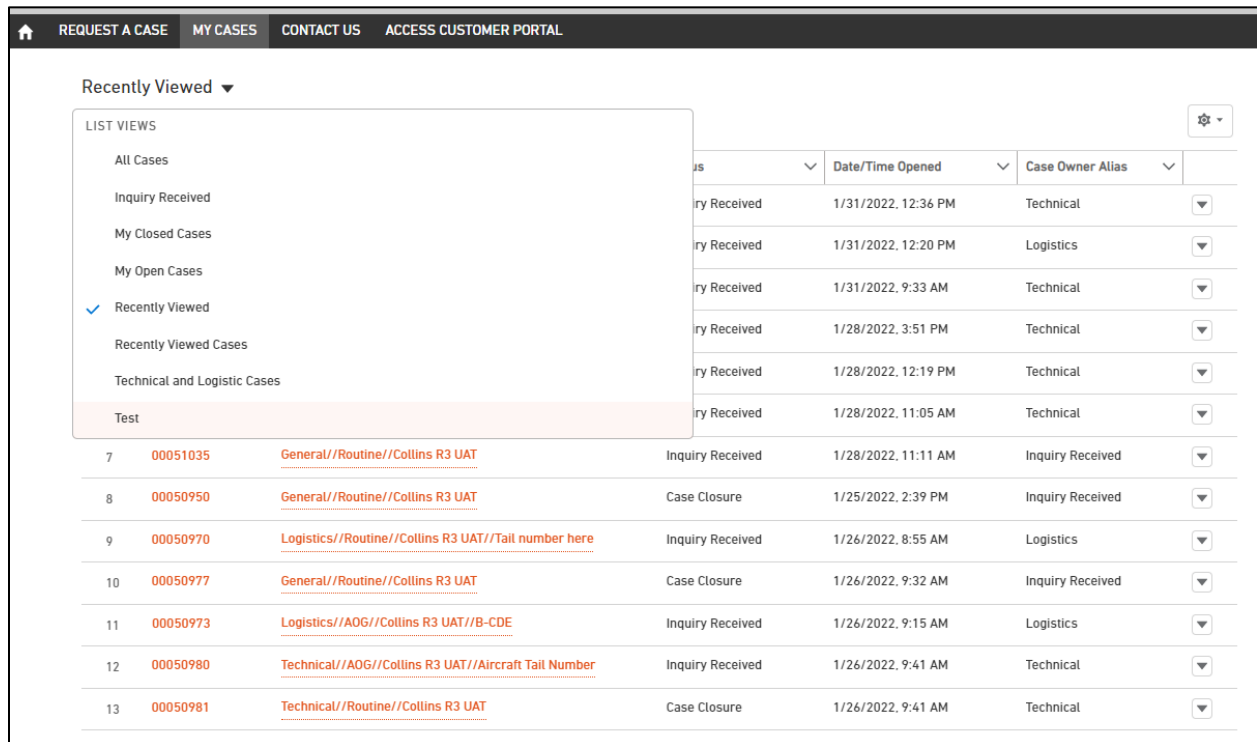
Previous Next

Case will not reopen automatically. Collins Team will review the request and be in contact regarding the case.

Find My Cases

Customers have access to see their most recent open cases on the homepage but can also access all their cases.

1. Click **My Cases** on top or side navigation.
2. List will default to **Recently Viewed** cases.
3. Click dropdown to access **pre-made list views** to filter cases (such as All Cases, My Closed Cases and My Open Cases).
4. Click **Case Number** or **Subject** to open case.
5. Hover over **Subject** for quick view



Case Number	Subject	Status	Date/Time Opened	Case Owner Alias	
7	00051035 General//Routine//Collins R3 UAT	Inquiry Received	1/28/2022, 11:11 AM	Inquiry Received	▼
8	00050950 General//Routine//Collins R3 UAT	Case Closure	1/25/2022, 2:39 PM	Inquiry Received	▼
9	00050970 Logistics//Routine//Collins R3 UAT//Tail number here	Inquiry Received	1/26/2022, 8:55 AM	Logistics	▼
10	00050977 General//Routine//Collins R3 UAT	Case Closure	1/26/2022, 9:32 AM	Inquiry Received	▼
11	00050973 Logistics//AOG//Collins R3 UAT//B-CDE	Inquiry Received	1/26/2022, 9:15 AM	Logistics	▼
12	00050980 Technical//AOG//Collins R3 UAT//Aircraft Tail Number	Inquiry Received	1/26/2022, 9:41 AM	Technical	▼
13	00050981 Technical//Routine//Collins R3 UAT	Case Closure	1/26/2022, 9:41 AM	Technical	▼