

February 2023 || Behind the Scenes Look At Canvas Support Webinar - Resource Handout

IMPORTANT: [Support vs CSM: When to file a ticket and when to ask your CSM](#)

Field Admin (FA)

- The primary contact(s) at your institution for the Canvas Support team. The Field Admin(s) have the ability to create, manage, and escalate Support cases via the Field Admin Console, and are the only users permitted access to the console. The Field Admin(s) also will have direct access to the Canvas Support team via phone, email, and depending on the Support package, live chat.
 - [How do I login to the new Field Admin Console](#)
 - [How do I use the new Field Admin Console](#)
 - [How do I view and manage cases in the new Field Admin Console?](#)
 - [How do I manage an individual case?](#)
 - Includes reminders about key aspects of case escalation such as where to manage the “Owner Name”, Case Status, Add CC option, etc.

Resources on the Field Admin Console Knowledge Base (KB) & KB Details--for Tier 1 only:

- [How do I view my customer KB in the Field Admin Console?](#)
- [How do I create a KB entry in the Admin Console?](#)
- [How do I manage KB update requests?](#)

Field Admin Console

- The interface by which Field Admins can create, manage, and escalate Support cases to the Canvas Support team as needed. This interface also allows the Field Admin(s) to view case dashboards, reports, and create macros to help respond to cases.
- [Field Admin Console](#) (only accessible by Field Admins)

Creating a Case: Remember “STILTS”

- **Summary:** User(s) in course(s) are having problems doing {describe issue}.
Troubleshooting: Each step of troubleshooting done and the result
Impact: How many people is this affecting?
Links:
 - URL link to User page
 - URL link to Course
 - URL link to Problem**“They Should be able to”:** What is the expected behavior
Screencast/Screengrab

Canvas Support Terms

- Standard Support
 - Number of Field Admin Licenses: 1
 - Contact Methods: Email (Field Admin Only), Phone from 6:00 AM - 6:00 PM Local Time (Field Admin Only).
 - Support Workflow: Only the named Field Admin may contact Canvas Support directly by either phone or email. All Support cases submitted by teachers and faculty will be routed to the Field Admin within the Field Admin Console. The Field Admin can escalate cases to the Canvas Support team for additional assistance as needed.
- 24x7 Support
 - Number of Field Admin Licenses: 3
 - Contact Methods: Email, Phone 24/7/365 (Field Admin Only), Live-Chat 24/7/365 (Field Admin Only).
 - Support Workflow: Only the named Field Admin(s) may contact Canvas Support directly by email, phone, or live-chat via the Field Admin Console. All Support cases submitted by teachers and faculty will be routed to the Field Admin(s) within the Field Admin Console. The Field Admin can escalate cases to the Canvas Support team for additional assistance as needed.
- Tier 1 (Faculty) + 24x7 Support
 - Number of Field Admin Licenses: 3
 - Contact Methods: Email, Phone 24/7/365 (Faculty Only), Live-Chat 24/7/365 (Faculty Only)
 - Support Workflow: All faculty, teachers, and admins have direct access to Canvas Support via email, phone, or live-chat 24/7/365.
 - Customer Knowledge Base (KB): Exclusive to Tier 1 clients, this document is created and managed by the Field Admin(s) and outlines how you would like the Canvas Support team to address specific scenarios when Teachers and Faculty contact them directly. It is the responsibility of the Field Admin(s) to manage and update the KB over time.
 - *Note:* If a user contacts Canvas Support about an issue that is not Canvas related, and is not addressed by the KB, the case will be reassigned to the Field Admin(s).

CSM Team Resources

- [Team Website](#)
- [Team Newsletters](#)
- [Team Webinars](#)
 - If you are not receiving our monthly newsletter or monthly webinar invites, please email us at accountservices@instructure.com so we can get you added.
- [Dear Danielle Request Form](#)