



Data Services

CLIENT SUPPORT

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Support Overview

This topic outlines how to receive support for DTCC Data Services products and service using three channels:

- **Data Services Learning Center**
- **Phone**
- **MyDTCC Web submissions**

Data Services Learning Center

The Data Services Learning Center (<https://dtcclearning.com/products-and-services/dtcc-data-services.html>) contains a variety of files and information for Data Services offerings, including user guides and sample data.

Phone Support

Call the Data Services Hotline at **1-800-253-2488**. Once connected, select from the following options:

Option	Verbiage / Action	Additional Information
Main Menu Options	<ul style="list-style-type: none"> For password issues related to SFTP servers or portal.dtcc.com, press 1. For data transmission or connectivity, questions, press 2. 	The user clicks on the Forgot Password link on the homepage to reset their MyDTCC password.
Option 1 Selected	Login issues and Password Resets	Use this option for the MyDTCC customer portal, as well as issues connecting to the SFTP server
Option 2 Selected	Data Transmission/Connectivity Questions	<p>Use this option for:</p> <ul style="list-style-type: none"> File delivery issues - including missing files, errors, or timing delays File name updates Requests to retransmit files General Connectivity Questions Whitelisting IP addresses

MyDTCC Portal Support Case Submission

Log into **MyDTCC** and select the **Support** tab to raise cases regarding data transmission and file content. Within the portal, the user can:

- Enter, update, and manage support requests
- View case details
- Track updates
- Add comments
- Upload attachments

For navigation assistance, refer to the *MyDTCC Features Guide*.

Data Services Support Channel

The user submits requests through the designated **Data Services** channels to ensure efficient responses to their DTCC Data Services inquiries. For example, if they submit a CA Web data challenge through an Asset Services support channel, a delay will occur while DTCC reroutes a request to the appropriate Data Services channels.

The user needs both **MyDTCC** access and the **Data Services** entitlement to submit Data Services cases.

- If they do not have access to MyDTCC, they must contact their organization's Super Access Coordinators (SACs) to request the **Data Services** entitlement.
- If an organization does not yet have SACs, it must designate at least two individuals to serve in this role. The organization should then complete the **SAC** form (selecting the **Data Services** entitlement) and submit it to itpcontractadmin@dtcc.com.
- SACs can assign user entitlements once DTCC has notified them that access is granted.

Submitting a Case Related to a Data Services Product or Service

When submitting Data Services cases through the MyDTCC Support tab:

1. Select **Support Request**.
2. Choose **Data Services** from the Product or Service dropdown menu.

Open a New Request

How can we help you, [redacted] ?

Product or Service
Errors, Transactions, Files, Reports, Asset Services

Connectivity Support
Connectivity & Protocol Issues (SFTP, FTPS, C3, M3)

Select a product

Product or service
Data Services

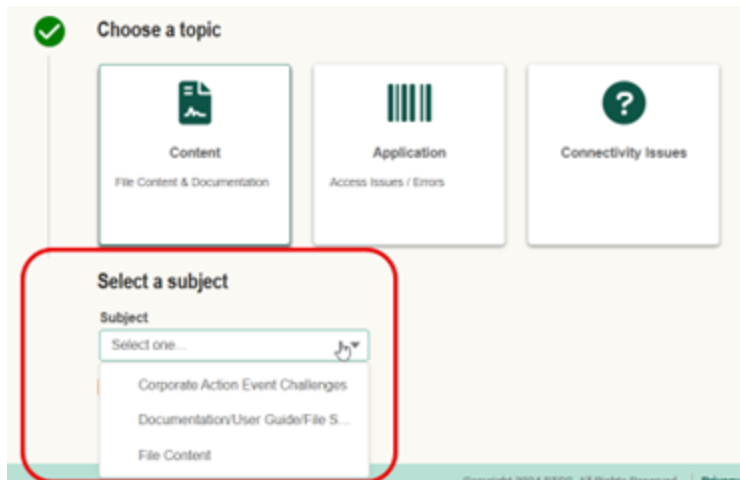
Choose a topic

Content
File Content & Documentation

Application
Access Issues / Errors

Connectivity Issues

3. Select the option that best aligns with your needs.



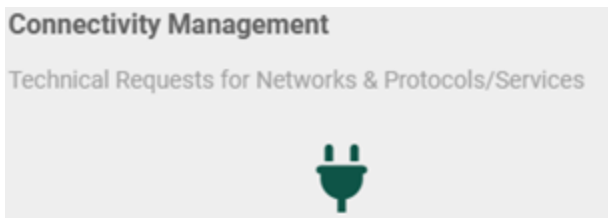
4. Click **Case Detail** on the submission confirmation message that appears to add an attachment, such as a sample file. Follow the on-screen instructions.
5. You receive an on-screen confirmation message, as well as an automated email containing the case number and case details.



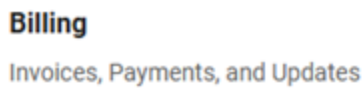
Submitting Connectivity and Billing Cases

Connectivity Management and Billing

- Request network connectivity changes that impact the entire organization by selecting the Connectivity Management tile.



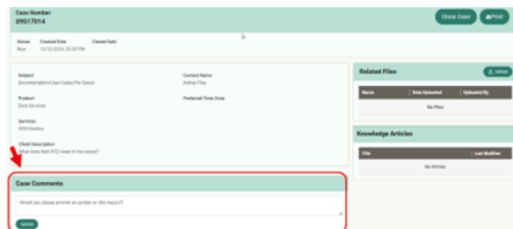
- Submit questions related to invoices, payments, or billing updates by selecting the Billing tile.



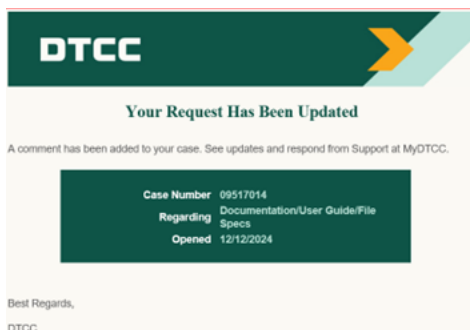
MYDTCC PORTAL CASE MANAGEMENT FOR DATA SERVICES

Once a case is created in the MyDTCC Portal, it becomes the primary method for communication between the user and the Data Services team.

1. Navigae to **Case Comments** to view updates from a DTCC team member or to add additional information about their inquiry.



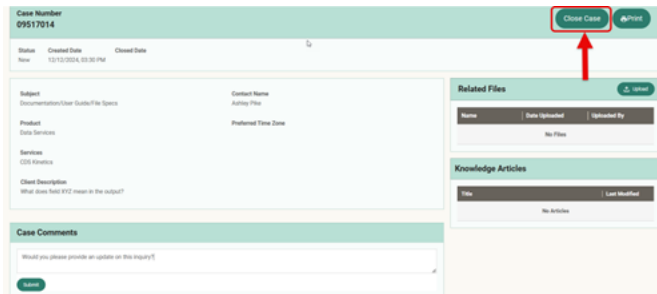
2. Both the user and DTCC team members can view new comments immediately.
3. The Case Comments section displays details when DTCC team members update the case. DTCC sends an automated email notification is sent at the same time updates are posted.



Comments from DTCC staff appear with a DTCC tag next to the team member's name.



4. Select **Close Case** when satisfied with the resolution or when you have independently resolved the issue. Closed cases are no longer visible to either the user or DTCC team members.

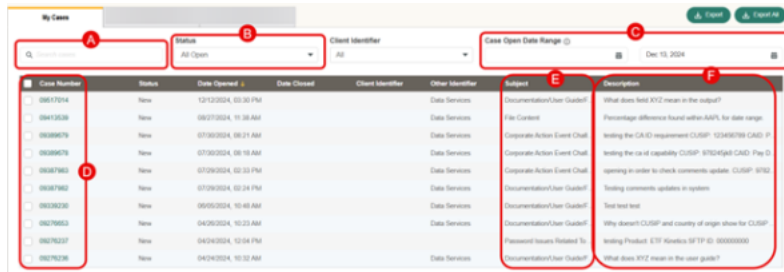


Note

You can reopen a case within seven days if it is closed in error. After seven days, you must open a new case.

Navigating the Case Queue

Use the image below and the accompanying table to understand how to navigate the case queue.



Annotation	Explanation
A	Search Cases: Allows the user to search for terms in existing cases.
B	Status Filter: Filters cases by status - All Open, All, New, or Closed
C	Case Open Date Range: Filters cases by the date range in which they were opened.

Annotation	Explanation
D	Case Number Column: Displays case numbers in the order they were opened (maximum of 10 at a time).
E	Subject: Shows the subject line for each case opened.
F	Description: Displays the details entered when the case was opened.
G	Export: Allows the user to export one or more selected cases to an Excel spreadsheet with all column details. <ul style="list-style-type: none">• Export all: Pulls all open and closed cases into an Excel spreadsheet.

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For More Information

DTCC Client Center: www.dtcc.com/client-center

DTCC Learning Center: www.dtccllearning.com

