Aptean Knowledge Customer User Guide

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Aptean Knowledge User Guide

This document provides customers with information to assist them in accessing and utilizing the Aptean Knowledge. Consult this Handbook for optimal utilization of our Aptean Knowledge including raising Service Tickets, accessing the Knowledge Base and also getting in touch with our Education Department for understanding our products further.

Note: Refer to the most current online version of this Handbook on our Aptean Knowledge for the most up-to-date information. The services described herein are subject to a customer being a compliant subscriber to Support & Maintenance for licensed Aptean products. Aptean reserves the right to change the terms and conditions of their support services for its product lines.

Contents

Overview

Aptean solutions provide deep customer knowledge and facilitate customer intimacy. Building strong relationships with customers are the foundation of successful businesses. Our market-driven application software and services not only gives significant insight into customer interactions, but offer valuable information to help anticipate customer needs and fulfill them. Streamlining operations is the best way to address complex issues and uncover new growth opportunities. Through our software and services, you can provide quality products – in stock and on time. By helping you increase productivity, improve responsiveness, and automate consistent and repeatable processes, we help you achieve and sustain true operational efficiencies across the enterprise

Purpose

The most efficient means of communicating your support needs and queries is by our Aptean knowledge.
Aptean Knowledge is a Web Portal that allows access to the customers to search the knowledge base; product documentation and also Forums for answers to common queries/issues that arise while using the product.
Aptean Knowledge is the most efficient means to communicate your needs and queries with support. The purpose of this document is to outline the various functions that can be used from Aptean Knowledge and how to use them.

Aptean Knowledge

Aptean Knowledge, available at https://support.aptean.com, provides direct access to a wealth of information, including:

Latest news from Aptean
Knowledge Base
Education Curriculum
Service Ticket submission, management and reporting
Software maintenance hot fix updates and service packs
Release highlights
Documentation downloads
Upgrade Resources
License Management
Company Profile and Contact maintenance
Forums

Subscriptions to Product, Industry and Technical bulletins
Available 24/7

Getting started on Aptean Knowledge

The Contact Administrator for your company will be able to provide acces to our Aptean Knowledge at https://support.aptean.com. They can either add a contact or send a request to Aptean Support to add another contact.

Upon receiving the credentials, login to Aptean Knowledge at https://support.aptean.com/selfservice/
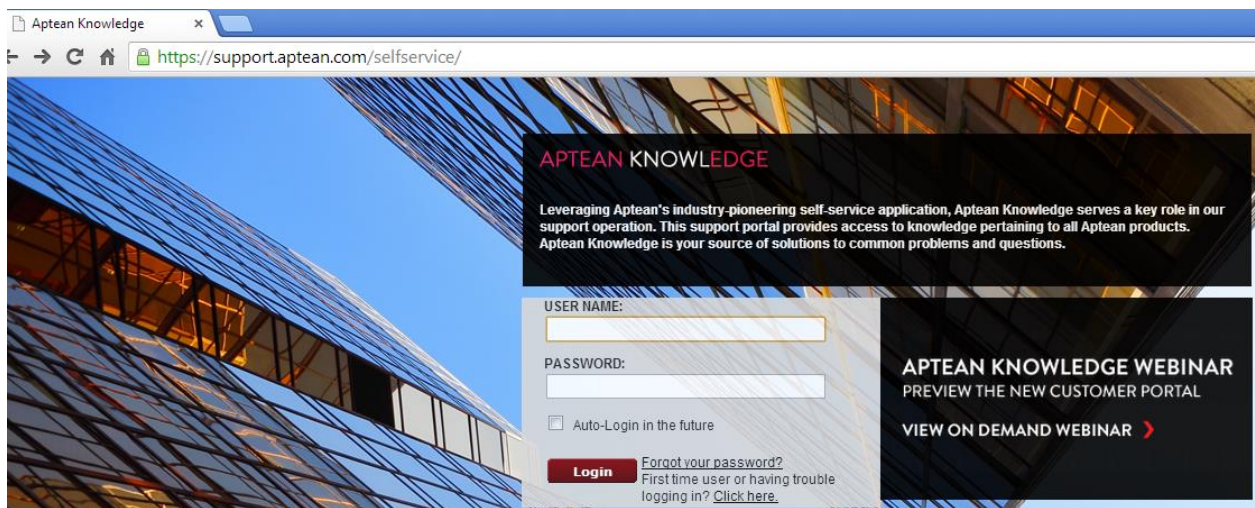
Upon logging the users will be able to see their name, Customer Id number, username; product lines which they are registered to, Account Administration and logout option at the top row of the screen.

This shows the full name, Customer ID and the login name/username of the Contact

Change Product

Apart from viewing their details, the contacts can select the "product" they are interested from the drop down menu of "Change Product".

The contacts will be able to choose product from the drop down menu only if the customer company has more than one "Product".
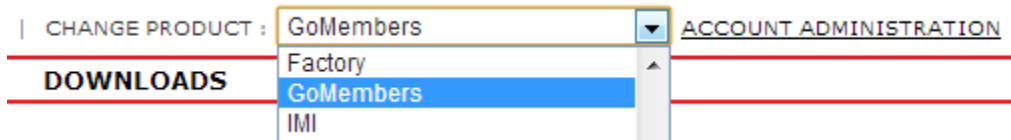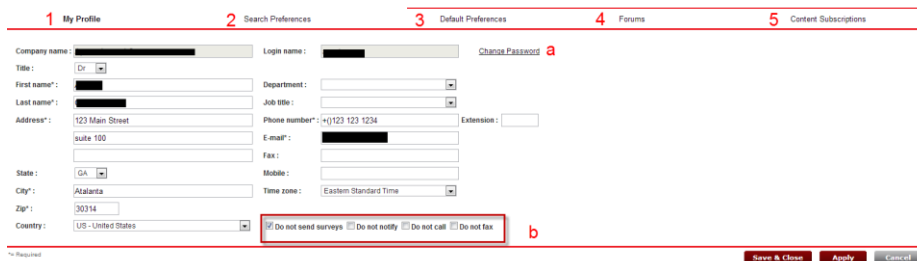
This will help in streamlining information related to a particular product line.

Account Administration

The Account Administration option allows you to change:

"My Profile" setting
Search Preferences
Default Preferences
Forums

"My Profile" settings

"My Profile" settings allow you to update your address, phone number, email address, select the mode of communication from support and change the password.

Search Preferences

Allows you to select how you want to view your search.

Default Preferences

Default Preferences allows the contact to set the default product line if your company has more than one Aptean products – it could be "My", "My Open" or "My Closed".

The contact can select the default tech profile to be used while creating new service tickets.

Forums
Availability of Forums option is subject to availability and is based on your Product line.

Content Subscriptions

Content Subscription allows you to subscribe to available content.

Just below the account details row, the contacts will be able to see the following tabs

Home
Education
Support
Downloads
Products and
Services

Home

The Home grid provides a brief overview of the contents of the Aptean Knowledge.

WELCOME TO APTEAN KNOWLEDGE FOR PIVOTAL

Welcome to the new customer support portal for organizations using PIVOTAL, powered by Aptean. Aptean Knowledge includes product information, downloads, and support services for you, the customer, and will continue to grow over the coming months.

Find your way around

1 Access your tickets
submit and check the status of your support cases online.

2 Support Center
View the knowledge base, customer forums, and support information.

3 Download Center
Access everything you need to run your products from product downloads to documentation to tools and utilities.

4 Products
Explore products and features that can enhance the capabilities of your existing system.

5 My Profile
Manage your personal and company information to ensure the information you access on Aptean Knowledge will be as accurate and personalized as possible.

ALL ABOUT USING APTEAN KNOWLEDGE

6 Recordings and How To Videos

- Aptean Knowledge - Introduction How To Video
- Aptean Knowledge - Account Administration
- Aptean Knowledge - Ticket Management Video
- Aptean Knowledge - Search the Knowledgebase

7 Documents

- Aptean Knowledge - All Videos and Documents
- Aptean Knowledge - How to Create a New Contact or User
- Aptean Knowledge - How to Create a New Ticket
- Aptean Knowledge FAQs
- Aptean Knowledge - Known Issues and Enhancements
- Aptean Knowledge - User Guide

It also provides link to access –

1. **Access your Tickets** – where in the contacts can directly go to Ticket Management and access/create Support Tickets.

2. **Support Center** – allows the user to view the knowledge base, customer forums, view product downloads and support information.

3. **Download center** - contacts can access everything that they need to run their business successfully, they can access product downloads to documentation to tools and utilities.

4. **Products** – the contacts can explore their products and features that can enhance the capabilities of their existing system.

5. **My profile** – Allows contacts to manage their personal and company information to ensure the information that they access on Aptean Knowledge to be as accurate and personalized as possible.

6. **Recordings and How To videos** – shows the link to multiple "How to" videos.

7. **Documents** – provides links to access documents related to Aptean Knowledge.

Contacts can also access these options from the right hand side panel of Aptean Knowledge.

SEARCH

Search the
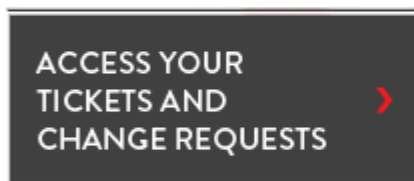Knowledge Base

Opens up Knowledge base search options.

NEWS AND EVENTS

KNOVA 8.1 NOW AVAILABLE
We are excited to announce that the highly anticipated KNOVA 8.1 release is now available to all Aptean Customers!

Aptean Knowledge - Recordings & Documents

Provides latest update from Aptean regarding the productline.

BE IN THE KNOW
LATEST NEWS FROM APTEAN
VIEW NOW

Provides latest update from Aptean regarding the productline.

ACCESS YOUR TICKETS AND CHANGE REQUESTS

Opens up Tickets and Change request tab, where the user can access tickets and change requests.

BE IN THE KNOW
TAKE OUR PORTAL SURVEY!
VIEW NOW

Allows users to take survey on Aptean Knowledge

CONTACT MY ACCOUNT EXECUTIVE

Allows customer to send feedback/queries to the Account Executive

CONTACT CUSTOMER SUPPORT

Provides a list of support phone numbers that can be used by contacts.

Education

Aptean understands and encourages its users to enrich their technical skills. Aptean Education offers comprehensive education program designed to help users, of all levels of sophistication, maximize their technology investment. To accommodate varying learning styles and work schedules, courses are delivered in recorded, live, and virtual formats.

The availability of these programs varies from product line to product line. Education tab provides the following options.

Course Recordings

Allows users to access the course recordings, where in they can view the prerecorded training videos. Please refer "Feature Offerings" for more details.

Contact an Instructor

Allows users to contact our Education team via a service ticket, when the users hits on "Contact an Instructor", a service ticket form opens where the user can fill up the form with all the request details and save the ticket.

A service ticket with the type "Education" will be created. Our Education Liaison officers will look into these tickets and take necessary action.

Course Architectures

Allows users to access the Course Architecture & Description documents, please refer to "Important documents" for further details.

Users can also accesses these tabs directly from the Education home page.

Feature Offerings	Allows users to access the course recordings, where in they can view the prerecorded training videos. Users also have the option to contact our

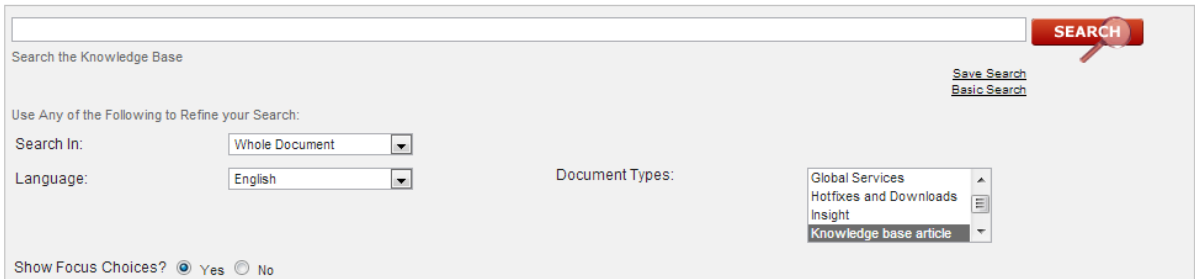|	
FEATURE OFFERINGS Course Recordings Contact our Education Liaison	Education Liaison; this service is available to all the users with no additional charge provided the users have a valid maintenance contract. Our Education Liaison can help users with the following: Better understand how to navigate and use the tools on our website Locate the recorded classes Request virtual training sessions, if available Help develop a training plan to fit your needs
Important documents IMPORTANT DOCUMENTS Course Architecture & Descriptions Pivotal CRM 6.0 Summary of Documentation Pivotal CRM 6.0 Troubleshooting & FAQs Aptean University Policy	Allows users to access the Course Architecture & Description documents, how to documents and also Aptean University Policies.
Helpful Tips	Provides users with the option to go through our list of frequently asked questions and get answers for the same.
Purchased Education	Provides users with the list of course that are offered to our contacts. These courses are chargeable and the contacts should contact their Account Executive for the pricing details.

Support

The support grid opens to the Support Center, driven and maintained by the Aptean support team and product experts. It is a one-stop shop for all support resources.

The support grid offers the following options:

My Knowledge

My Knowledge option tab from Support Center allows users to search Knowledgebase articles based on the document type. The document could be of any of the following types - Knowledgebase articles, product documentation, release notes, tickets etc.

Users are provided options to save their favorite documents. These saved documents appear under **"Saved Documents"** and can be easily available from the "My Knowledge" tab.
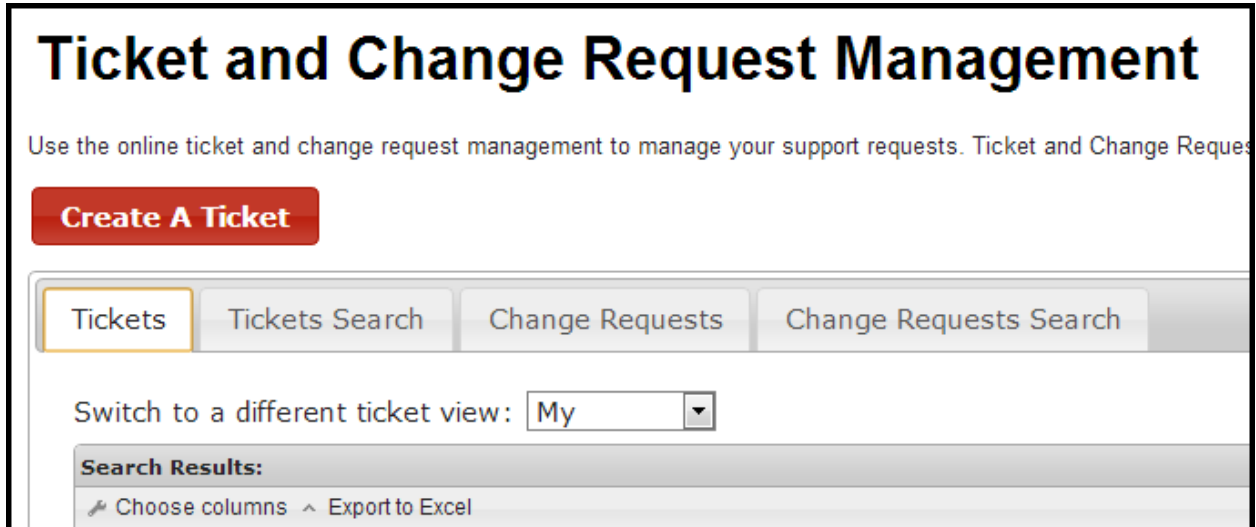
"My Subscriptions" - My Knowledge page also shows the forms to which the user has subscribed.

Tickets and Change Requests

Tickets and Change Requests (CR) management allows users to create, update, close and query support tickets, and link and query change requests.

Create Tickets

Contacts can create new ticket by hitting on the "Create a Ticket".

A form will appear where in the company and the contact information will be auto generated. You will need to add details such as product line, version etc.

Contacts need to hit on Continue to complete the ticket creation process, when contacts hit on continue, they will be provided with an option to upload screen shot or any other additional information as an attachment to the ticket.

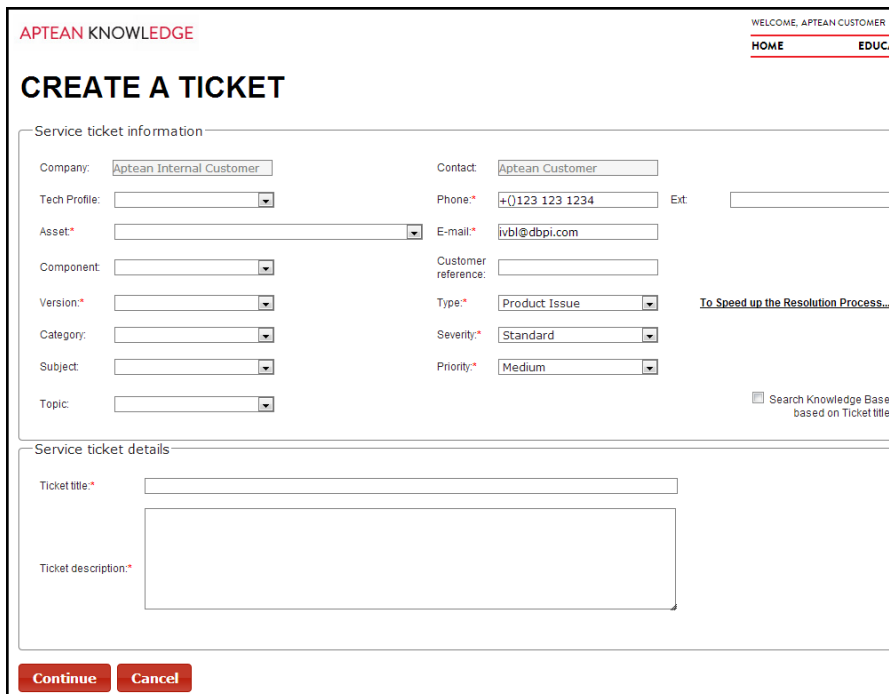Once the customer has provided all the required fields, they can submit the ticket.

This generates a Service Ticket number, which should be used to correspond with the assigned specialist.

Here are the other fields listed in the new Service Ticket:

Company Name: Pre-populated by default.
Contact: Pre-populated by default.
Tech Profile: The Tech Profile stores environment information about a customer's installation. This information automatically populates various fields on the ticket. A company may have multiple Tech Profiles.

For example: Production, Test, and Development all with different environment information. The Asset, Component, and Product Version are included in the Tech Profile. Using the Tech Profile speeds ticket entry and ensures you have the correct environment information for the customer's installation.

Asset: is the drop down menu where the contact can select the Product they have issue with.

Component: drop down menu, where the users can select the respective Component to which they need assistance.

Version: Pre-populated by default with information from your company's contact record.
Email: Pre-populated by default.
Phone: You can give a different phone number to contact. Not a pre-populated field but a required field.
Type: Support, Beta, or Education – select the type of case you are creating.
Severity: Select the appropriate severity level.
Priority: Select the appropriate Priority from "High", "Medium", "Low".
Ticket Title: Key words help route your case, so this is important as it will be used to search the knowledge base for a solution, if desired.

Ticket Description: This section is to be used to describe in detail the issue you are experiencing or the question you have.

Attachments: You will be able to provide additional information about the Service Ticket you have created in the form of screen shot's etc, which can be attached to the Service Ticket.

Search Knowledgebase based on Ticket Title – is a check option that allows users to search Knowledgebase articles based on the ticket title if checked. Contacts should hit on "**Create**" to complete the ticket creation process.

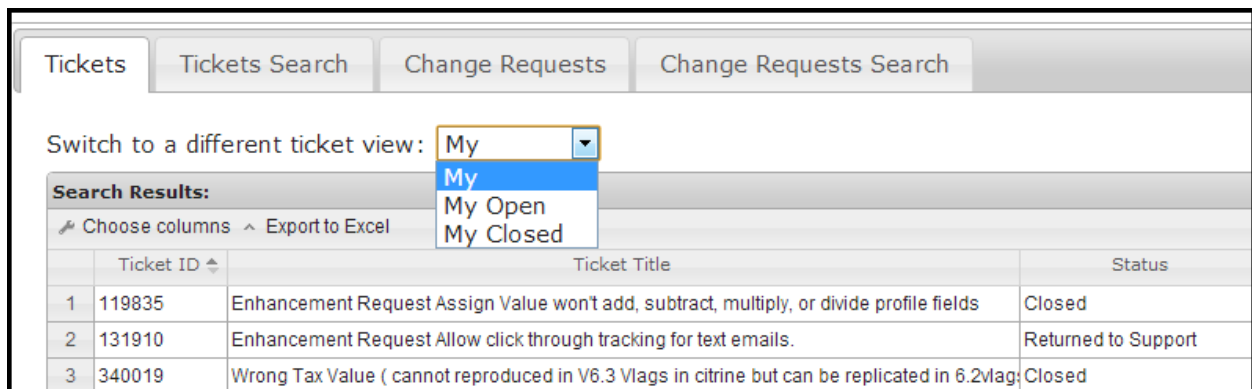**Version**: Pre-populated by default with information from your company's contact record.

Submit: Upon choosing to submit the Ticket you will be provided with the Ticket ID.

Completing the case request form as described will help us in understanding and resolving your reported problem quickly.

Ticket search

Aptean Ticket Management provides multiple options to search for existing tickets. Users can filter tickets based on their convenience.

By switching to a different view or by sorting the columns by clicking on the small arrows that are present on each columns.

They can also select only columns that they need and remove columns that they don't need to be visible by selecting "choose columns" option. Contacts also have an option to "Export to Excel", where they can export the report to Excel database for further reviewing.

Advanced search can be performed by clicking on the "Ticket Search".

Users have the option to select the field and provide necessary Operatator and values as needed. These reports are highly customizable and can also be exported to excel.

Adding Notes to Service Ticket

Contacts can add updates to the tickets by double clicking on the ticket they want to add updates to from the Ticket Management sheet.

Contact will be able to see details, description, notes, attachments history and resolve tabs. Contacts will not be able to modify description details that they have already provided in the Ticket; however, they will be able to add notes by clicking on the "Add note" option.

Users can add the necessary update and submit the new note. The updated details will be shown under the list of notes.

Attachment – You can add any document related to the Service Ticket from the Attachments tab.
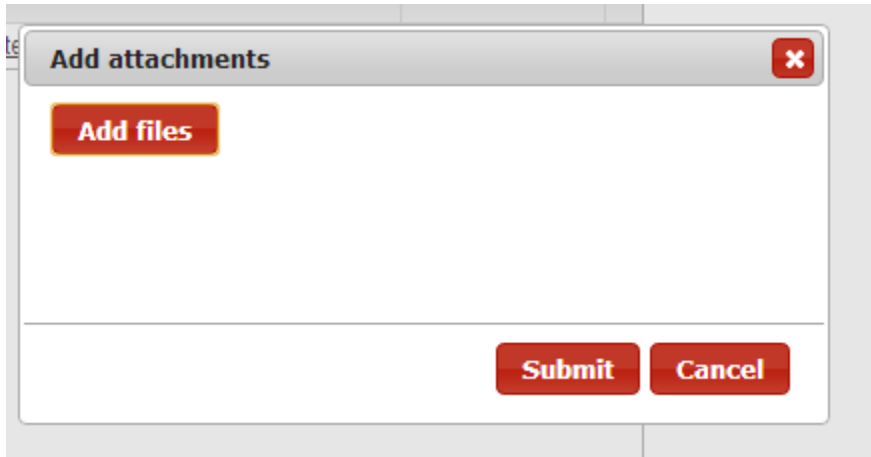
History: Contacts will be able to view the brief history of the tickets,
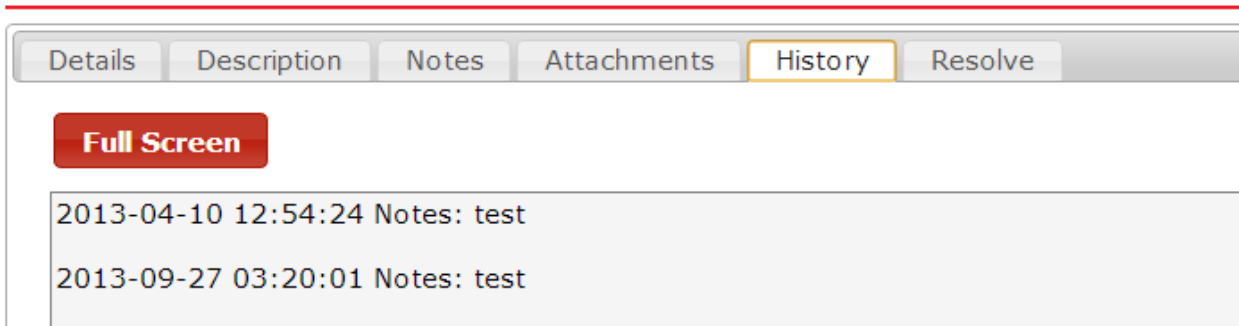
Resolve

Contacts will be able to ask the specialist to close/Resolve the ticket by hitting on the resolve option, users are asked to provide a brief description of how the issue was resolved and link any KB articles if they had used them for resolving the issue.

Help us to Facilitate Your Support Request

Did you know that the information you provide can help Support give you a quicker resolution on your web cases? Below is a list of information that is very helpful to have for a web case, based on the type of issue.

Type of Issue	Information to add to your case
Error message	Provide a screen shot of the first error received, and provide the exact steps taken prior to receiving the error, if known. Provide information on when the error first started, and if anything changed. Reboot the workstation, and try the process again to see if the error re-occurs. State in your case how many users or workstations are affected by the error. State in your case whether or not you can duplicate the error on demand. State in your case whether or not you can duplicate the error on a different workstation or with a different login.

Discrepancy (windows or reports showing incorrect information)	Provide the report or screenshot of the window showing the incorrect information highlighted. State in the case if there were any errors during the transactions. If the report or layout has been customized, state in your case whether or not the discrepancy happens on the standard report / layout.
How to... Question	Mark the appropriate Screen ID that reflects the screen you are on. Ensure the description of the question is as detailed as you can make it. This will typically allow the analyst to begin researching the answer to your question right away, without having to obtain more information from you first.

Regardless of the type of issue, you can also include the following to expedite the resolution of your support case:

- Full description of the problem or error
- Detailed duplication steps
- Screen shots
- Error logs
- When the problem started, and how many users or workstations the problem is affecting
- Operating systems affected, example: Windows 7 64-bit.

Diagnosing the Issue

Our Support specialists will work on determining the nature of your case. (i.e. Is it an environmental or product functionality issue, or perhaps an issue of understanding or configuration?) The Support Engineer will work closely with you to assist in answering specific questions about your case and, if applicable, recreate the Service Ticket within our labs. Your assistance will help to identify and progress your case.

Ticket Progress

Once the cause of your case has been determined, the Support Engineer will advise you as to whether the cause is specific to the Aptean Product or whether the cause is outside of our control. (i.e. environmental issue, user issue, etc.) If the source of the issue is with the Aptean Product, the Support Engineer will identify an existing solution if one exists. If no known solution

exists, then the Support Engineer will continue to investigate the Service Ticket and possible remediation.

For issues that significantly impact software performance, our Support Engineer will work the case until a solution or workaround is available. This effort may involve gathering any additional information (system logs, dumps, etc), recreating the Service Ticket or preparing, if necessary, for transfer to our Development team.

For issues that do not impact business operations in any material fashion, Technical Support may create a **Change Request (CR)** for the issue and dispatch it our Development and/or Product Management group for further review.

Typical lifecycle of a Support Ticket

Ticket Created

•Specialist works on the issue and sends resolution to the customer

Resolution Tested

•Customer tests the resolution

Ticket Closed

• Issue is resolved
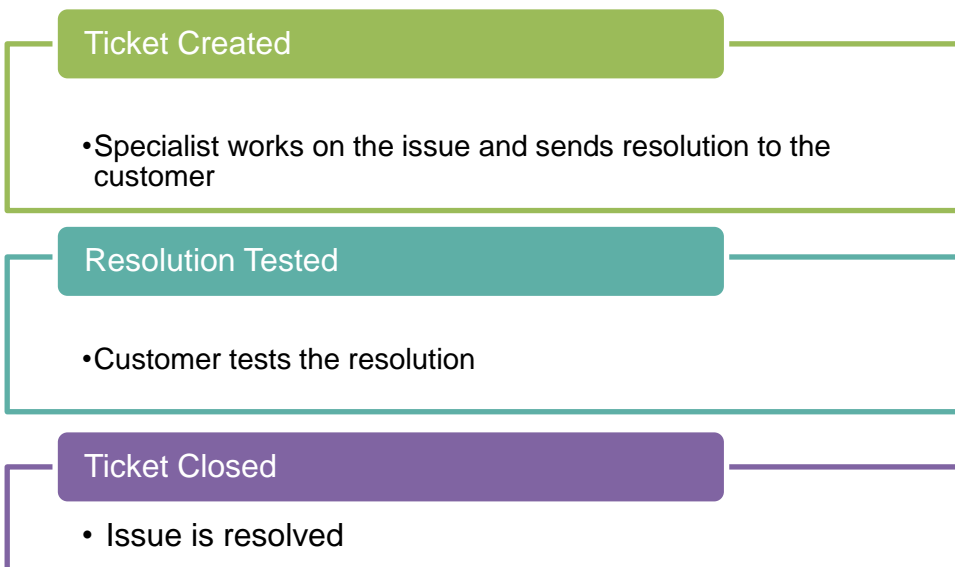
Change Requests (CR)

Not all the Service Tickets follow the typical Lifecycle of the Service Ticket. There could be situations where the issues are not resolved due to a product defect or there could be a request for further enhancements to the Product.

In such a situation, a Change Request (CR) will be created by the Support team in our internal system used by Aptean to track bugs, enhancements etc.

All Change Request escalations are preceded by thorough research and testing by the Support team; including testing in the most current release version. Only Support Specialists can create Change Requests.

Once a new CR has been created it will be linked to the Ticket. Hence it is necessary for the contacts to initially create a Support Ticket.

The new CR system allows –

- Contacts that have rights to view tickets to search through bugs and enhancements.
- Contacts can link their company to an existing CR.
- View their tickets linked to CR.
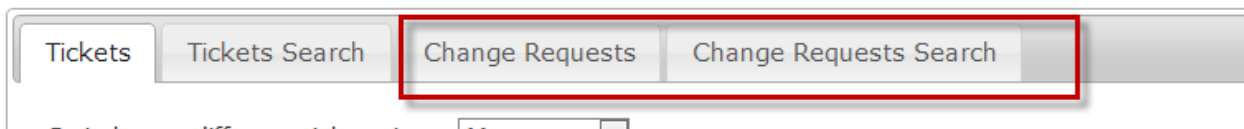
Change Request views

Contacts can select "Views" based on their need.
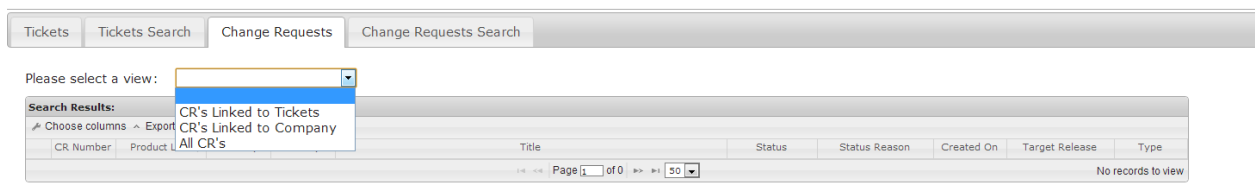
The available views are

- **CR's linked to tickets –** will display only CR's for your company that is associated with your tickets.

- **CR's Linked to Company** – will only shows CR's that you have "linked" to you company.
- **All CR's** - CRs linked to customer tickets as well as CRs linked to customer Company.

The reports are highly customizable; contacts can sort/filter the columns, add additional parameters as needed. This sort/filtering feature is similar to that of Ticket Search.

Change Request features

When the contact opens a CR, they will be able to see the following:

CR Display

1 **Number:** 17091

Title: AZESP0318 - unable to only insert account combinations

2 **Description:** Although when the case is to *only* add account value combinations for validate the account value format, that is. to validate the new value towards the forma purpose for adding the account value combinations was to use excel input via routine Z message data, but then the excel matrix should be unusable to work with, and very mu

3	**Status:**	Proposed	**Component:**
4	**Status Reason:**	Waiting to be reviewed	**Category:**
5	**Priority:**	3	**Subject:**
6	**Created Date:**	2013-10-07T02:59:49.560	**Topic:**
7	**Target Release:**		**8** **Product:** AOM - Advanced Order Manage
	Workaround:		**Product Version:**

Linked Tickets:

9
Ticket Number	Title
10091101	AZESP0318 - unable to only insert account combinations

Back to Search

1. **Number** – Unique, internal number auto- assigned at the time of creation contacts/specialists can use this number to check on the CR.
2. **Title** – is the title of the CR. This will also be visible under Ticket to which the CR is linked.
   Description – provides the brief description of the issue.

3. **Status** – could be Active, Proposed, Closed or Resolved. Depends on the current status of the CR.
4. **Status Reason** – provides a brief description for the status
5. **Priority** – priority of the CR is set between 0 – 4
6. **Create Date** – shows the date and time when the CR was created
7. **Target Release** – Planned release where the change request functionality will be included.
8. **Product** – shows the Product line to which the CR belongs to.
9. **Linked Tickets** - Shows the list of Tickets that are "linked" to this particular CR. Contacts can then look into these tickets for the details.

Other terms used in CR:

Subject The area of the application that is affected
Component The component of the base product that the issue affects
Product Line The Aptean product the change request applies to
Closed On Date the change request was closed
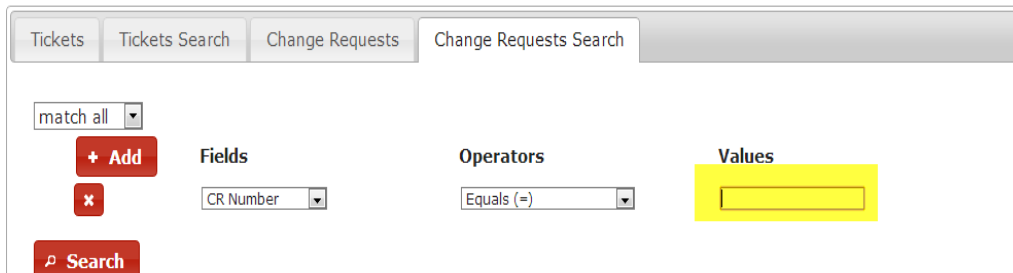
Created On Date the change request was created

Workaround An alternative method to get around the issue described in the change request

To Check existing CR's

- If the user knows the CR number, they can search the CR by selecting CR number under Field option and providing the CR number at the value.
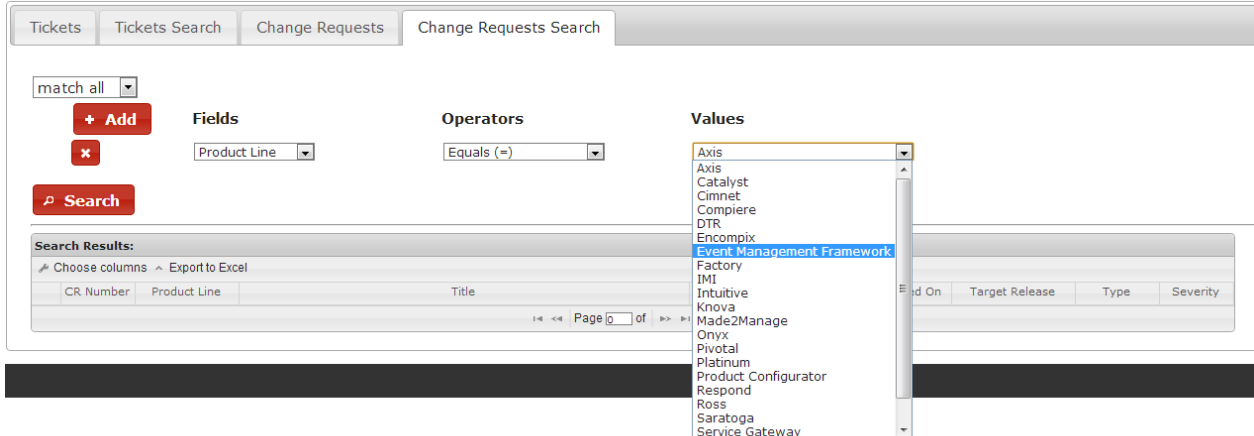
To check existing CR's for a Particular Product Line

- If the user does not know the CR number, it is suggested to run the search by selecting Product line in the "fields" option and then selecting appropriate "product line under the values tab.

NOTE: If the customer company has only one registered product, they will be able to view only one product in the drop down menu under the values option.

This will show CR's associated only with that particular Product line.

Linking published CR's to your Company

Contacts may want to follow up on any of the CR's that are available on Aptean Knowledge on regular basis by linking these CR's to their companies.

To do so contacts need to

a. Search for an existing CR for that product line. *Refer to* *"To check existing CR's for a Particular Product Line."*
b. Double click on the CR. The CR form opens up with the details of the CR.

Number:4484

Title: Fixed/lot cost on subcontract PO's does not work correctly

Description: Fixed/lot cost on subcontract PO's is currently a customer nightmare. We added the information and even the receiver will only post the item cost, without the lot cost, when it is created. User of course does not know this unle have to add an item to account for the lot cost-- this item natually is a variance from the receiver unless they do a JE. F receiver and invoice postings, or some of both. User cannot circumvent this because fixed cost is not editable (that's a c total. If it posted as part of the receiver cost and then showed on the invoice line item, that would be acceptable, I think

Status:	Closed	**Component:**	
Status Reason:		**Category:**	
Priority:	2	**Subject:**	
Created Date:	2013-02-01T22:57:45.310	**Topic:**	
Target Release:	ERP 6.00 B1	**Product:**	Made2Manage Base Product
Workaround:		**Product Version:**	

Link to Company

Back to Search

c.   Click on "Link to Company"

Contact will be able to view all the linked when they select "CR's linked to Company", under change request. *Refer to "CR's Linked to Company" for more details*.

Unlinking CR's from your Company

When the contacts no longer want to follow up on the linked CR's they can "Unlink" CR's from their Company. To do so contacts need to do go to "Cr's Linked to Company" view, and then double click on the CR they want to unlink.

The CR form opens with the details and also provides an option to "Unlink from Company"

CR Display

Number:4484

Title: Fixed/lot cost on subcontract PO's does not work correctly

Description: Fixed/lot cost on subcontract PO's is currently a customer nightmare. We added the information and even got it to print on RPPO as part of the the receiver will only post the item cost, without the lot cost, when it is created. User of course does not know this unless they run the order costing report. have to add an item to account for the lot cost-- this item natually is a variance from the receiver unless they do a JE. Result: either a variance from job esti receiver and invoice postings, or some of both. User cannot circumvent this because fixed cost is not editable (that's a different CR however). We need to mi total. If it posted as part of the receiver cost and then showed on the invoice line item, that would be acceptable, I think.
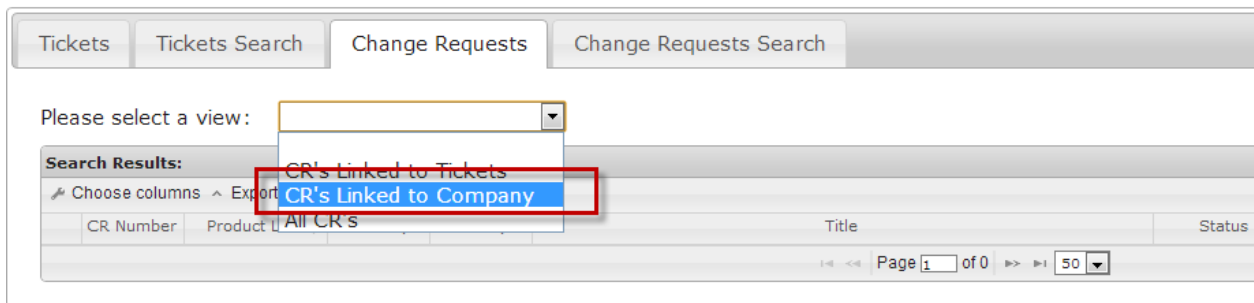
Status:	Closed	**Component:**	
Status Reason:		**Category:**	
Priority:	2	**Subject:**	
Created Date:	2013-02-01T22:57:45.310	**Topic:**	
Target Release:	ERP 6.00 B1	**Product:**	Made2Manage Base Product
Workaround:		**Product Version:**	

Unlink from Company

CR Severity

1 – Critical Software has ceased to function completely, impairing the customer to continue working reasonably. The software is functioning, however issues are occurring that jeopardize the running of the business, including incorrect or misleading information used for critical business decisions. There is no viable work around.

2 – High The software is functioning in a limited capacity with little or no viable work around. The time to perform normal daily activity and tasks is severely impacted.

3 – Medium The software is functioning but not as designed. A viable work around exists but slows productivity making daily tasks cumbersome.

4 – Low The software is functioning as designed, however the understanding of the design is unclear making use of the software slow, but not impacting business operations adversely. There are cosmetic or spelling/grammar errors that do not affect the use or function of the software in day to day business.

CR Priority

0 – Critical Needed immediately, hot patch worthy and definitely required in the next major/minor release or service pack.

1 – Extreme Needed immediately, may or may not be hot patch worthy but should be in the next major/minor release.

2 – Urgent Needed very soon, not hot patch worthy but should be strongly considered for the next major/minor release.

3 – Moderate Customers can wait for this to be prioritized. It is not worthy of a hot patch, but should be slated with the normal release process as there is a viable work around.

4 – Low Wish list - customers would like to have this, but not as important or high a priority as other issues in the system.

CR Type

Compatibility The bug type of Compatibility is used when there is a problem with the Operating System or Server that is causing errors in our program.

Design The bug type of Design is used when something is functioning as originally designed, but the design is flawed and needs to be updated or reworked. It could also be a new use case of the feature that was not the intention of the feature originally, but makes the feature better by adding it.

Documentation The bug type of Documentation is used when something in the Help, Installation documents or User Manuals needs to be updated or corrected.

Enhancement The bug type of Enhancement is used when something is being added to the system as part of a new feature or enhancing the existing features.

Functional The bug type of Functional is used when something is not functioning as expected or something is broken, including but not limited to an error message being returned.

Performance The bug type of Performance is used when there is a performance issue being reported, typically when something is processing very slowly.

Third Party The bug type of Third Party is used when there is a problem with the interface to a

third party integration or a third party application is installed and causes some type of conflict or error with our program.

User Interface The bug type of User Interface is used when there is a problem with the GUI or user interface, this could be the overall layout design or it could be a misspelling or bad grammar in a label or message displayed to the user.

CR Status

Active Actively being worked on

Closed There will be no further work performed on this CR

Proposed New change requests that need triaged

Resolved Has been fixed and slated for release

CR Status Reason

Waiting to be Reviewed Not yet assigned or has been deferred

Under Investigation Assigned for investigation before deciding to perform work on it

Issue Fixed Work complete, change request sent for testing

As Designed Code is functioning as designed

Cannot Reproduce Unable to duplicate the issue described

Deferred for Future Consideration Decision deferred until another time

Duplicate -Duplicate of another change request

Will Not be Implemented PM decision to not fix

Under Review Triaged and assigned for investigation

Forms

Apart from the knowledge base articles and other related documentation that can be searched on the microsite, our Support Center also provides an option to interact with other customers via a Forum.

All customers who have access to our Support Center will also be able to access the Forum and join the discussions related to any topics.

This is a product specific option and the customer will be able to view refined discussions based on the product they select.

Contacts will be able to view available –

Forums – Provides the list of available Forms for that particular Product Line.

Newest Discussions - Shows the list of latest discussion available for the Product Line.

Most Popular Discussions – Shows the list of Most Popular Discussions that is currently undergoing.

My Subscriptions – Shows the list of Forms the customer has subscribed to.

My Most Recent Posts – Provides details of the forms to which the customer has responded to.

Support information
Under support information contacts will be able to see the Customer Support Handbook for their respective product lines.

Documentation

The Documentation Tab will lead users to Download Center for the Product Line. From the Download Center users will be able to download -

> **Product Downloads** - allows users to download full version of Aptean Software, service pack, service patches and optional modules that extend the capabilities of your core system

Product Documentation – shows users a list of latest product documentation.

Technical Documentation – provides a list of technical documentation for the product line. These documents are subject to availability.

Tools and Utilities – provides a list of Tools and Utilities that can be downloaded and used by the user.

Users can also accesses these tabs directly from the Support Center home page.

Visit the Support Center often to: Visit the Support Center often to: • Search the Knowledge Base • Submit and check the status of your support cases online through Tickets • Network and collaborate with other users via Forums • View Product Downloads	Provides users direct access to search the following: - Knowledgebase - Tickets - Forums - View Product Downloads
Resource center	Allows users to access the online recordings and How to Videos
What's New	Provides users the latest list of documents

Downloads

Downloads tab provides accesses to the Download Center the Product Line. Refer to the Documentation option for further details.

Product downloads

From Product downloads page, users can download new releases of Aptean products based on the product lines that have been purchased. Service Packs are also available for download in order to keep your systems up-to-date.

Ross customers who want to download retrofit products can also download retrofits from this page.

Documentation

Refer to the Documentation option for further details.

Installation Guides

Installation guides can also be downloaded from the documentation center, Refer to the product Documentation option for further details.

Products

The product section of Aptean Knowledge is designed to give our contacts all the information they need about products available within and as an extension of existing Aptean software.

On this page customers will be able to see the latest news of the Product they are registered to along with the Customer Collaboration, base system features and Optional Modules.

Product Downloads

Refer to the Product Downloads section for more information.

Release information

Release information can also be downloaded from the documentation center, Refer to the Documentation option for further details.

Customer collaboration

Aptean provides its users unique opportunity to play an active role in shaping the future of the product. Customers can participate by bringing issues to our notice by creating support tickets, providing feedback on the customer advisory boards, interact with other customers on Regional user groups to check our what's new with the product, volunteer for the beta testing etc.

Optional modules

Aptean provides additional modules that can be included in your product implementation to provide more robust and complete functionality, contact your Account Executive for more details.

Services

Aptean has developed a standardized delivery methodology across all our product lines. This methodology, allows us to provide our customers with the highest level of service across all our service offerings. Aptean provides Consulting, Technical Consulting, Customizations, Hosting and Upgrade services. Contact your Account Executive for more details.

Glossary of Terms

Company*:* A Company record is a detailed description of a firm or organization that Aptean has relations with.

Interaction: A planned or completed task, appointment, To-do, email or any type of activity related to a contact, company, lead, or opportunity.

Asset*:* Assets represent specific products a client has purchased.

Service Ticket*:* Service Ticket records are detailed descriptions of a problem, question or request from an Aptean client. They are used to track and solve our client's issues. Tickets may be logged by the client through the Portal or by a Support Representative.

Contact: Contacts are individuals that have a type of relationship with Aptean. Contacts are associated with Companies, and may be associated with Opportunities and Service Tickets.

Dashboard*:* A Dashboard includes Web Parts that may display Pivotal search results, Pivotal graphs, an SSR Feed or any Web based information as needed.

Entitlement*:* Entitlements help you determine if your customers are eligible for customer support so you can create cases for them. A customer may be eligible for support based on a particular asset, account, or service contract.

Subscription*:* Setting criteria to subscribe to receive notification when service tickets or steps are created or updated.

Unsupported Software: Unsupported Software is defined as software for which the customer is not current on payments of support and maintenance fees. Customers with unsupported software do not receive releases, telephone assistance, access to the Support Center, or any other support and maintenance services.

Support status: Indicates the current stage of a Service Ticket. The determination of who is responsible for taking the next step on a Service Ticket can be made from the status of the Service Ticket. Some commonly used statuses are "New", "Closed", and "In Progress".

Account Executive*:* Your Account Executive will work with you to identify areas where our services can benefit your business and enhance your use of our products. Beginning with needs assessment and continuing through to deployment and support, your Account Executive will help you maximize the efficiency of your operations. Your Account Executive is your first point of contact for any issues relating to your system other than general product support.

CSAT (Customer Satisfaction Survey): A mechanism used to measure the satisfaction level of customers in response to services offered by Global Technical Support. Each time support closes a Service Ticket, the Customer Satisfaction (CSAT) survey form is auto generated and sent to the customer.

The response scores are collected and analyzed periodically. We encourage you to respond to the survey as it provides us very valuable feedback in order to continue improving our service to you. Your participation and responses to the surveys is greatly appreciated.

Appendix A – Definitions

Ticket Severity: Ticket severity is based on the business impact the issue has for the customer production environment. Customers initially declare the severity level when submitting a ticket. We ask our customers to use their best judgment when selecting the severity level for an issue. The severity level is used to prioritize work fairly and appropriately for the situation. The four severity levels are:

Severity	Definition
Critical	Production Functionality not working; critical business processes affected. *
Urgent	Business is affected; issues is not impacting mission critical processes. *
Standard	Business moderately impacted; users can work; efficiency is hampered.
Low	Business not impacted significantly; issue is annoying or an enhancement.

*Customers are requested to provide a brief description of the impact and rationale for critical and urgent severity levels.

The severity level may change during the life of a ticket. For instance, severity may be reduced with a viable workaround or inability to recreate the problem. Severity may also be upgraded based on increased usage of the function, project deadlines, or increased frequency of the issue.

Ticket Priority: Ticket priority is dependent on the nature of the issue and the customer's time frame for resolution. It can also be used to prioritize multiple tickets with the same severity - the priority field will notify the support staff which ones should be addressed first. Priority can be modified, increased or decreased, as tickets are being worked on.

Priority levels are Urgent, High, Medium, and Low.

Ticket Status: Indicates the current stage of a Service Ticket; the determination of who is responsible for taking the next step on an incident can be made from the status of the incident.

Ticket Status	Description	Notes
Assigned	Ticket has been assigned to a support agent to work on	
Closed	Ticket is closed	
Closed Pending	Ticket is resolved and Support is waiting for customer approval to close	
Escalate to R&D	Ticket requires additional assistance from R&D	
In Progress	Ticket is currently being worked on by Support	
New	Ticket has just been created and has not been worked yet	
On Hold	Ticket is 'On Hold' and cannot be worked on by Support	When maintenance contract has expired
Request to Close	Customer has requested that Support close the ticket	Set automatically when the customers click "Resolve this Ticket" on the portal
Returned to Support	Ticket was either with another group and has been returned OR was 'Waiting Customer' and the customer has entered the required information via the portal	Set automatically when the customer adds a step on the portal
Technical Escalation	Ticket requires additional assistance from another team	
Waiting Customer	Support is waiting for the customer to provide requested information	
Waiting Internal	Support is waiting on some internal task to be completed before continuing to work on the ticket	
With Product Management	Ticket has been linked to a Change Request and is now in the hands of Product Management and R&D	
With Services	Ticket is related to a services project. Indicates the ticket has been transferred to services	

Notes

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