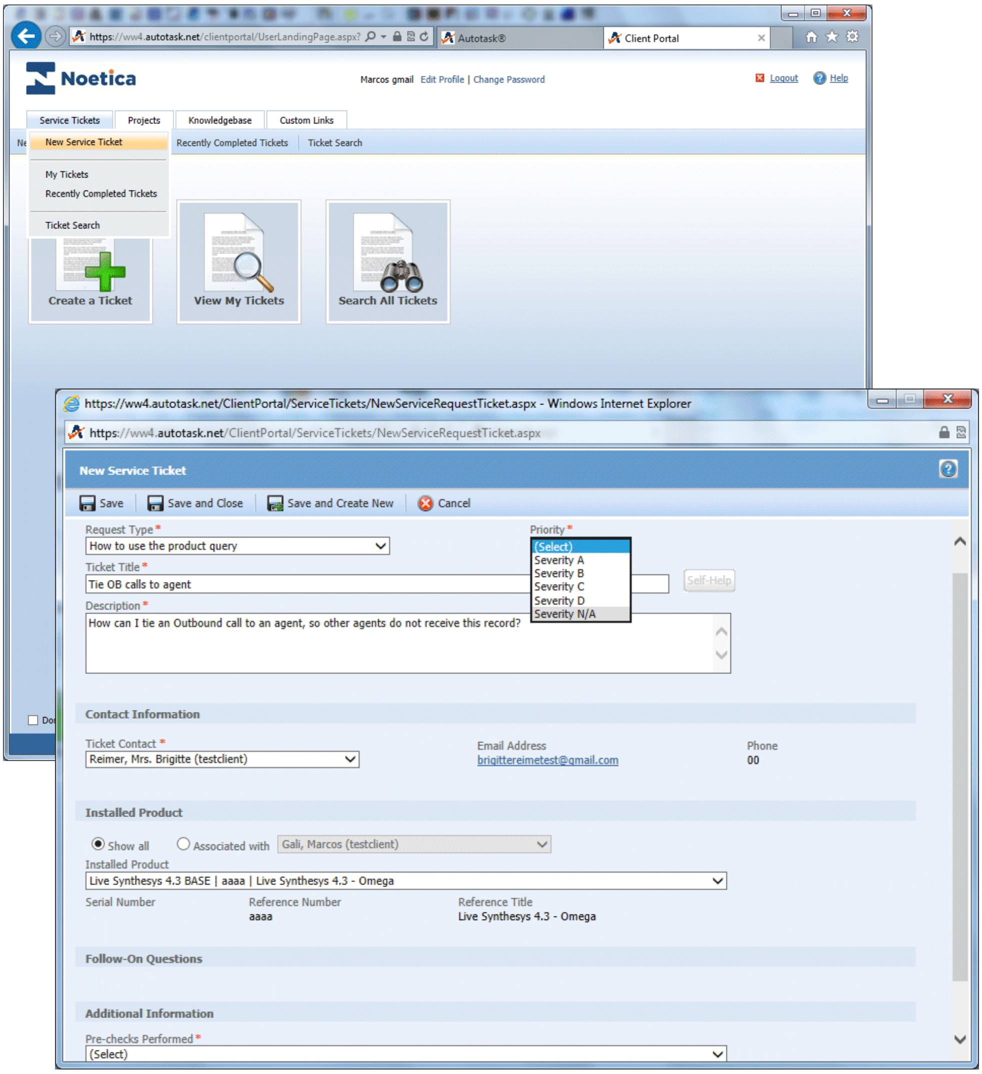
Noetica Customer Support Portal



THE CUSTOMER SUPPORT PORTAL

INTRODUCTION 4

CUSTOMER PORTAL LOGIN 5

CUSTOMER PORTAL LANDING PAGE 6

INTRODUCTION TO SERVICE TICKETS 8

RAISING SERVICE TICKETS 9

Completing Service Ticket details 10

VIEWING EXISTING SERVICE TICKETS 11

Adding/ Removing Column Grids 12

Filtering on Column Headers 12

Exporting Ticket Details 13

Advanced Filtering 14

UPDATING SERVICE TICKETS 15

Adding a Ticket Note 16

Adding Attachments 17

RUNNING TICKET REPORTS 18

THE NOETICA KNOWLEDGEBASE 19

Searching the Knowledgebase 19

INTRODUCTION TO PROJECTS 22

VIEWING EXISTING PROJECTS 23

Viewing a Project Summary 24

Viewing a Project Schedule 25

Viewing the Project Calendar 25

UPDATING PROJECTS 26

Viewing and Adding Project Notes 27

Viewing and Adding Project Issues 28

Emailing the Project Team 29

Viewing Project Costs 30

INTRODUCTION

Noetica Customer Support Portal

The Noetica Customer Support Portal is used to raise and view service tickets.

The issue submitted goes directly into our Service Management system, where we track and schedule all our service work. You can login to the Noetica Customer Support Portal at any time to view our progress on your ticket.

Submitting and tracking a Service Ticket

Service tickets are raised to report bugs, request technical support, or to submit new feature suggestions.

You can track tickets by logging in to the Noetica Customer Support Portal, reviewing the status, notes and other information that has been recorded.

Working on Projects

Each time a new project is started, a project lead will be assigned to prepare a project plan, defining **Project Tasks** to be completed by our company, and **Client Tasks** for you to complete.

Ongoing projects that we have set up for your company can be viewed and updated via the **Projects** tab in the Noetica Customer Support Portal.

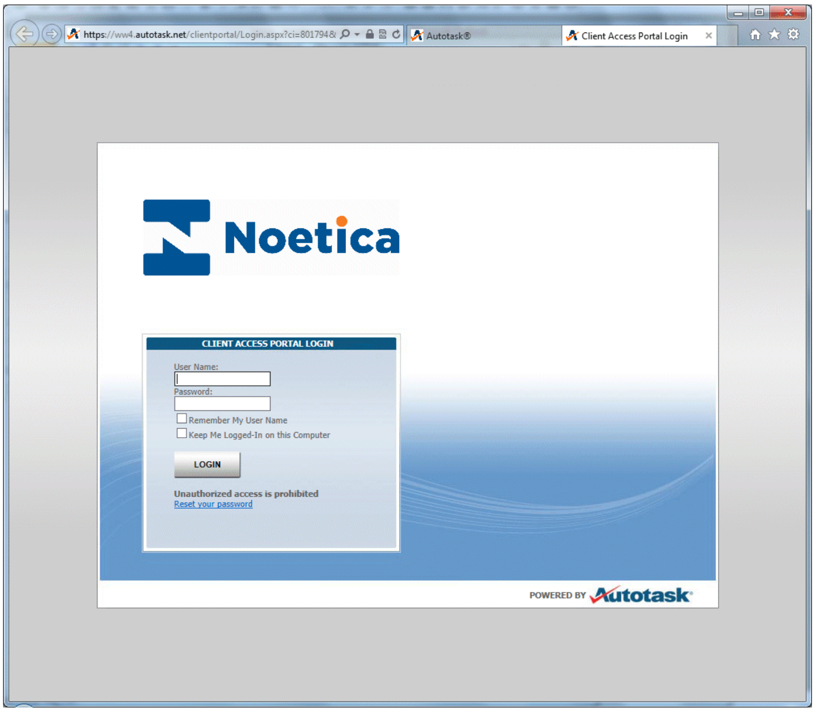
Tasks can be tracked at the project level, or as part of a phase or sub-phase.

CUSTOMER PORTAL LOGIN

Service tickets are raised and managed in the Noetica Customer Support Portal, a Cloud-based IT Business Management Software, powered by Autotask.

To access the Client Portal, you will need access to a Web Browser and the relevant URL address. Noetica will send you the link for the website and the required login details.

- Click on the link to open the Customer Support Portal Login page.
- Enter your user name and password.
- Click the LOGIN button to open the Client Portal Landing Page.



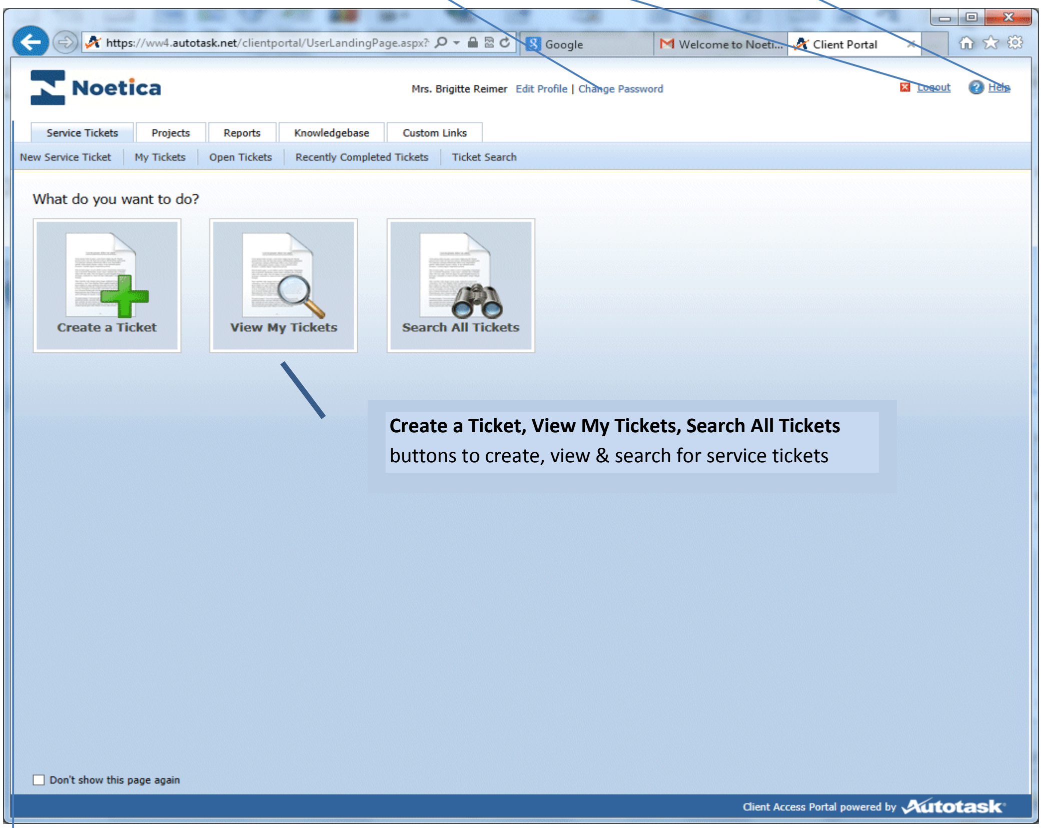
- For rapid logon you can tick the *Remember My User Name* and *Keep me logged-In on this Computer* checkboxes.
- If you wish us to change the password for your Client Portal login, click the *Reset your password* link. Our technical support team will then send you an email with your username and password details.

CUSTOMER PORTAL LANDING PAGE

On opening the Noetica Customer Support Portal, the Portal Landing Page is displayed. Here you can amend profile and password details, create or search for service tickets, access project information, run ticket reports, view information via the Knowledgebase and open a custom link to the Noetica website.

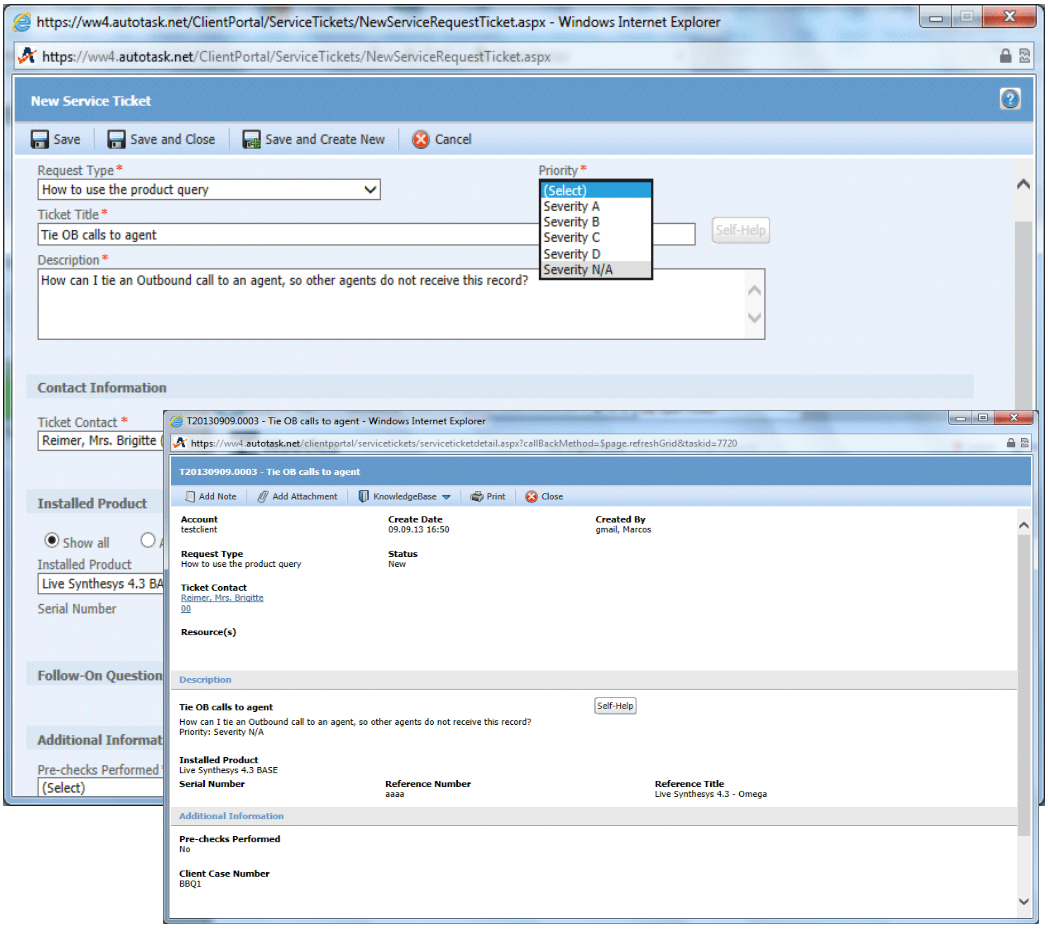
Edit Profile/ **Change Password, t**o amend profile/password details

Logout, to end session **Help** to access Client Portal help**.**



Tabs	**Used to**
Service Ticket & sub-navigation buttons	View and search for service tickets using ***New Service Ticket, My Tickets, Open Tickets, Recently Completed Tickets & Ticket Search*** options.
Projects	Access project information and progress status, via ***New Project Issue, My Projects*** and ***My Open Tasks*** options. To send an email to the project team, use the ***Email Project Team*** link.
Reports	Run and view ***Ticket Reports***.
Knowledgebase	Search for information related to the raised request, to help solve your issue.
Custom Links	Open the Noetica website and other useful links.

SERVICE TICKETS



INTRODUCTION TO SERVICE TICKETS

Service ticket, are raised to report bugs, request technical support, or to submit new feature suggestions.

A service ticket is the shared record of the issue reported. Initially a service ticket includes only the information that you have entered, including a title, a description of the issue, the priority, answers to any follow-on questions, and your contact information.

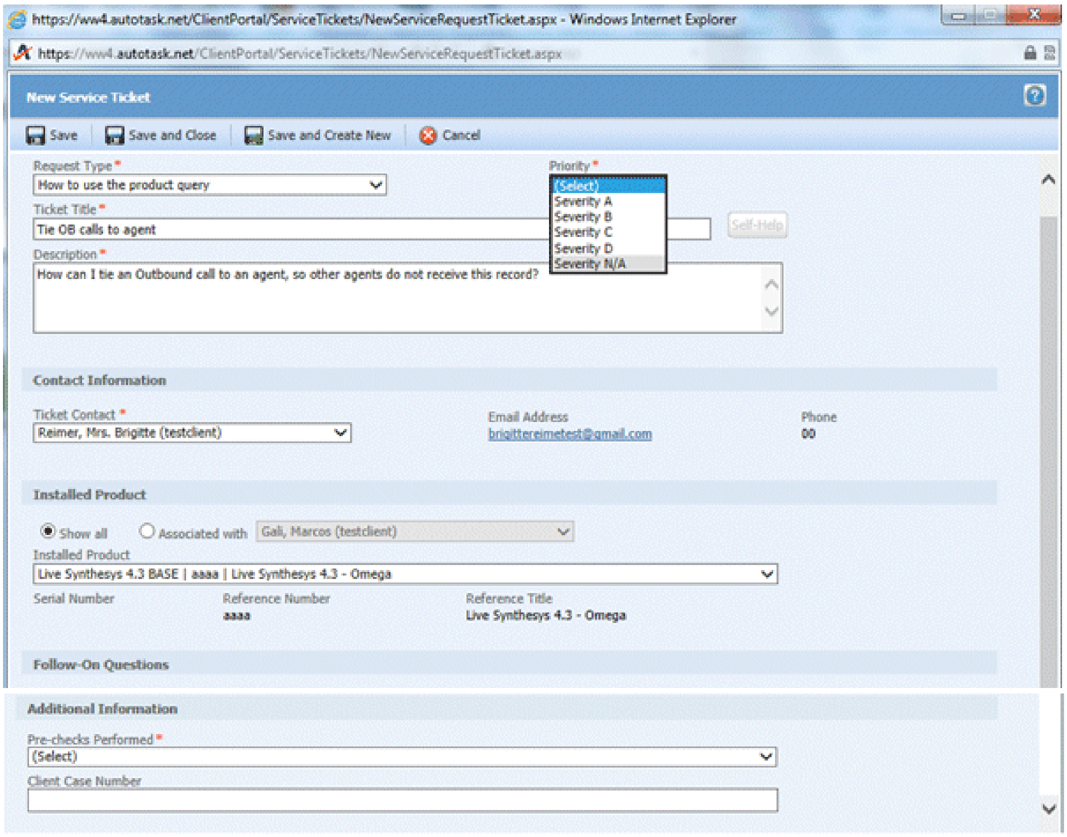
After we receive the ticket, assign it and begin to work it, the ticket may also include additional information, such as the resource assigned, hours worked, and notes that have been added.

You can track the status of the ticket by logging in to the Customer Support Portal, finding the ticket, and reviewing the status, notes and other information that has been recorded.

RAISING SERVICE TICKETS

To raise and submit a new service ticket

- Click the **Create a Ticket** button in the Portal Landing Page, or the **Service Tickets** tab and select *New Service Ticket*.
- In the **New Service Ticket** dialog, select and enter the required information, to ensure that the correct people are assigned to resolve your issue.



- Having entered all required details you can save your *Service Ticket* selecting one of the following save options: **Save, Save and Close, or Save and Create New**.

Before raising a service ticket, speak to your IT department to ensure that the Synthesys services are running and that your infrastructure has been checked, including operating system, services, network, third party software, telephony lines and system, and are not the cause for issues you are experiencing within Synthesys.

*Any checks performed will need to be entered into the **'Pre-Checks Performed'** section of the ticket.*

For more detailed information about completing a new service ticket, please see the next page.

Completing Service Ticket details

Fields to be completed in the Service Ticket dialog when raising a new issue include:

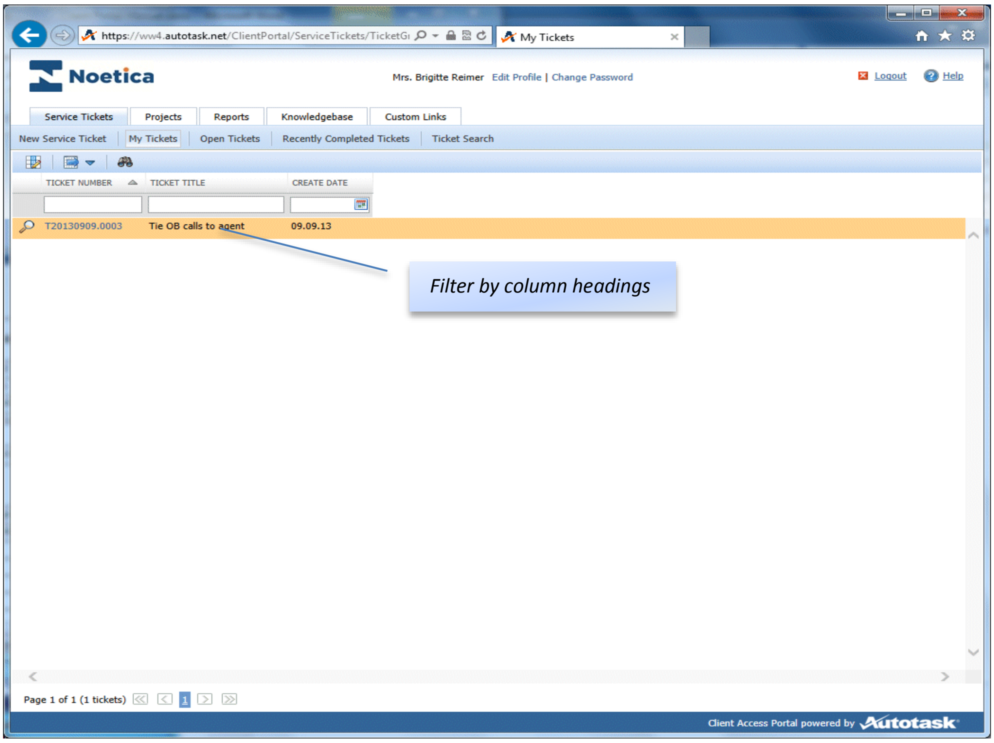
Field	Description
Request Type	Select the type of request under which to report the issue, i.e. **Change/ Implementation/ Maintenance; Consultancy; Product use query**; **Product Feature/ Integration queries** or **Technical Support**, to help us to gather the information we need from you up front, and to ensure that the correct people are assigned to resolve your issue.
Priority	Select a priority for the issue (A-D, or N/A).
Ticket Title	Type a title for your service ticket. Ensure this title is as clear as possible to communicate your issue.
Description	Type a description of the issue. Include as much detail as you can, including what the problem is, how to replicate the issue (if applicable), and any other important details.
Contact Information	Select a ***Ticket Contact***, i.e. the person to be contacted if we need additional information.
Installed Product	***Show All/ Associated With***: Select the *Show All* radio button to show all configuration items. Select *Associated with* to filter the configuration item list by associated contact. ***Installed Product***: Select the product for which the ticket is raised, to display configuration details, such as *Serial Number, Reference Number* and *Reference Title*.
Follow-On Questions	Answer any follow-on questions that appear, to help us gather important information from you up front, so we can begin working on the issue as quickly as possible.
Additional Information	This section shows any ticket User-Defined Fields (UDFs) that have been added and set to display in the Customer Support Portal. **Pre-Checks Performed:** You need to complete this section, with the help of your IT department as first point of contact to confirm that the Synthesys services are up and running and that all infrastructure has been checked, including operating system, services, network, third party software, and telephony lines and system, to ensure that these are not responsible for the issues you are experiencing within Synthesys.

VIEWING EXISTING SERVICE TICKETS

To open existing *Service Tickets*, use the **View My Tickets or Search All Tickets** buttons, or the sub-navigation buttons **My Tickets, Open Tickets, Recently Completed Tickets** or **Ticket Search,** to narrow down the list of tickets that will be displayed in the ticket grid.

- Click **Open Tickets** (manager / administrator levels only) to view a list of all open tickets for the account and any child accounts.
- Click the **View My Tickets** button or **My Tickets** sub-navigation button to view the tickets raised by or assigned to you.
- Click **Recently Completed Tickets** to view a list of tickets that were marked with a status of Complete within the last 7 days.

The tickets matching you search will be displayed in a ticket grid. For recurring tickets, only those with a Due Date within 30 days will appear.



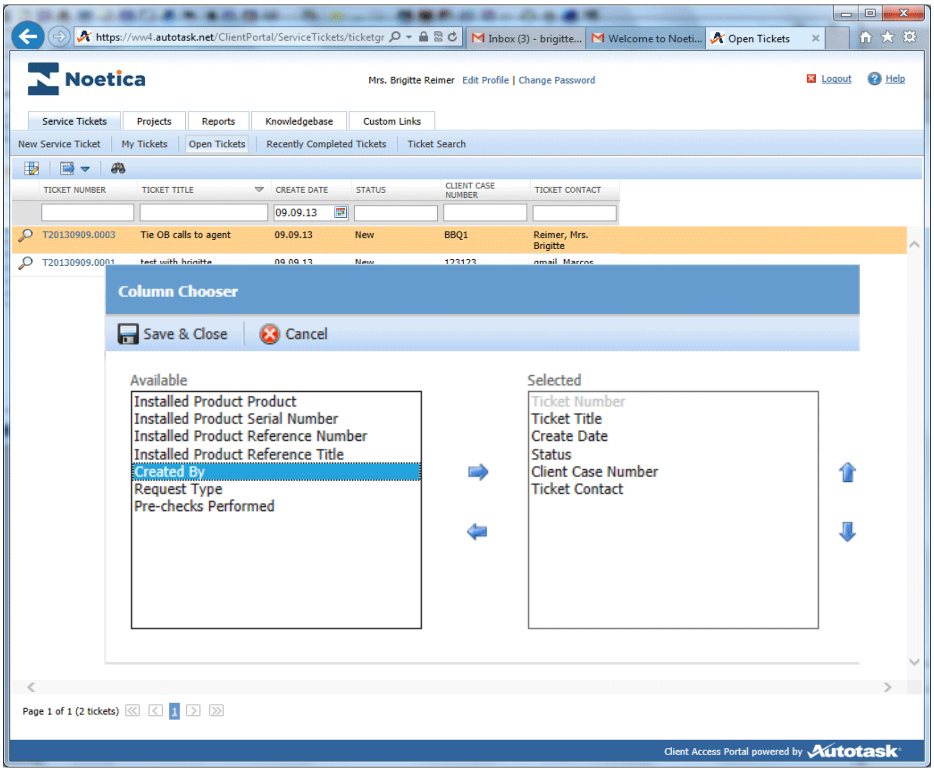
Icons	Used to
Column Chooser	Add or remove grid columns.
Export Format	Select the file format for the Export, i.e. Comma Separated Value, Microsoft Excel or PDF.
Advanced Search	Specify detailed search criteria for locating specific tickets.

For more information about grid manipulation and *Advanced Search* options, please see next page.

Adding/ Removing Column Grids

The grids in which tickets are displayed are very flexible. You can add, remove, reorder, sort and filter on columns.

- Click the **Column Chooser** icon to open the *Column Chooser* dialog.
- To **add a grid column**, select the column name in the *Available* section and move it to the *Selected* section using the blue arrow.
- To **remove a grid column**, select the column name in the *Selected* section and move it to the *Available* section using the blue arrow.
- To **re-order columns**, click a column and drag it to its new location.
- Click a column header, to **sort it in ascending order**, i.e. from most recent to oldest.
- Click a column header again to **sort in descending order**.



Filtering on Column Headers

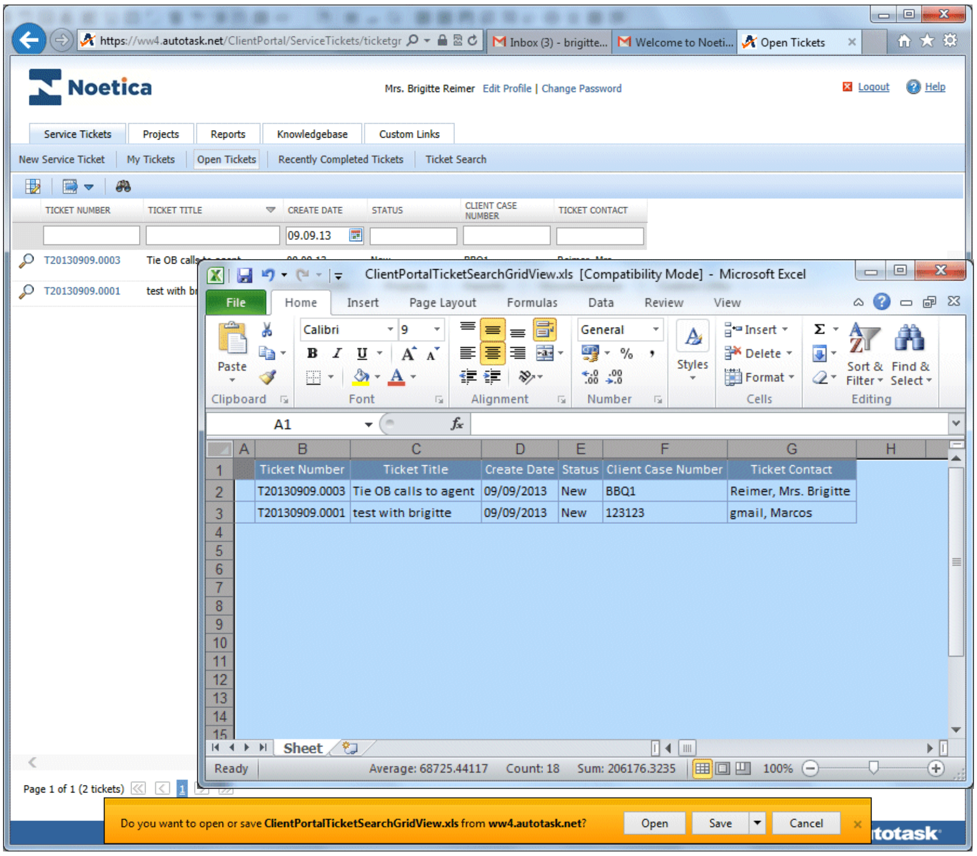
To apply a filter to column headings

- Enter your filter criteria directly into the field below the column header. The filter will be applied shortly after you stop typing.
- You can search by multiple columns at once. For example, when you search by Account name, you can then search for tickets under this account using another filter.

Exporting Ticket Details

To export ticket data from the ticket grid

- Click **Open Tickets** or **View My Tickets** to open the ticket grid.
- Enter the relevant filter criteria into the field below the column header to display the desired tickets.
- Click the **Export**  option at the top of the list and select the desired export format, i.e. Comma Separated Value, Microsoft Excel, PDF.
- If you plan to print the report, select the .PDF format.
- Click the **Column Chooser** option, to add grid columns, as required, to display more detailed information.

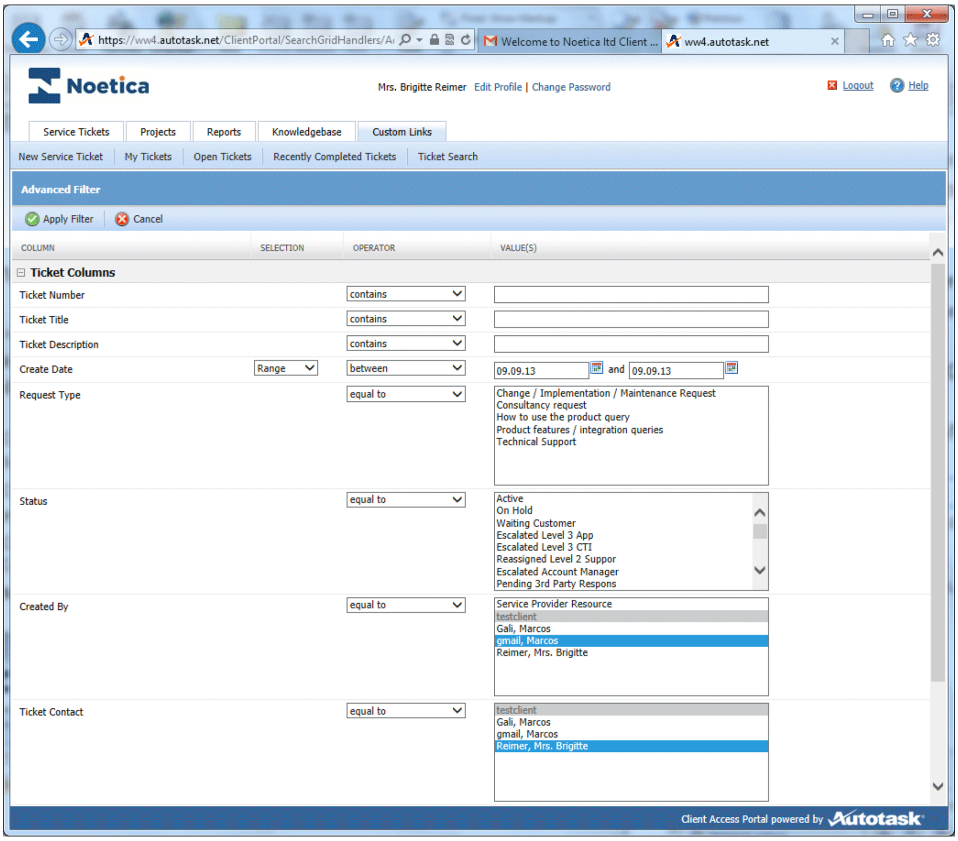


- Click **Open** or **Save/ Save As/ Save and Open** as required to open or save the ticket report in a new window.
- Click Cancel, to cancel the export.

Advanced Filtering

The Advanced Filter provides detailed search criteria for locating specific tickets.

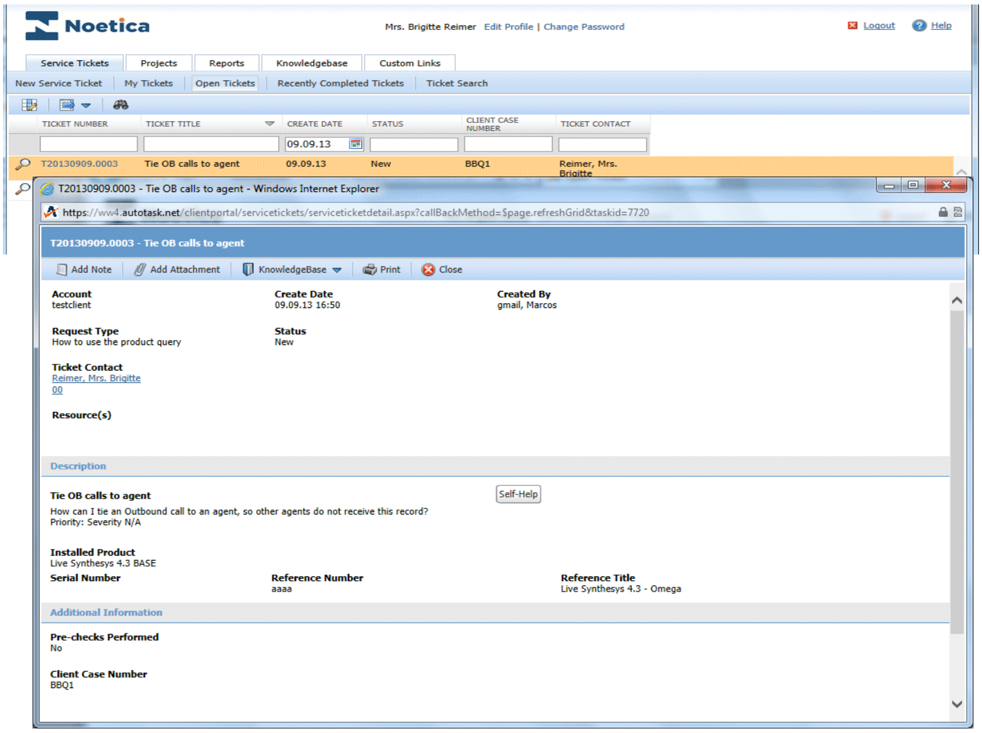
- Click the **Advanced Filter** icon  on any ticket grid.
- In the Advanced Filter dialog, you can now select the required filter type via the Selection, Operator, and Value(s) columns.
- Click **Apply Filter**. This will return you to the ticket grid, with your new filter applied.
- To modify the filter, click the **Edit** link under the *Advanced Filter* heading at the top left of the grid.
- To clear the filter, click the **Clear** link.



UPDATING SERVICE TICKETS

If you wish to open your ticket, for example to add a note or an attachment, or to print ticket information

- Click **Open Tickets** or **My Tickets** to open the ticket grid.
- Click on the magnifying glass icon on the left of the service ticket that you wish to view or edit to open the ticket.



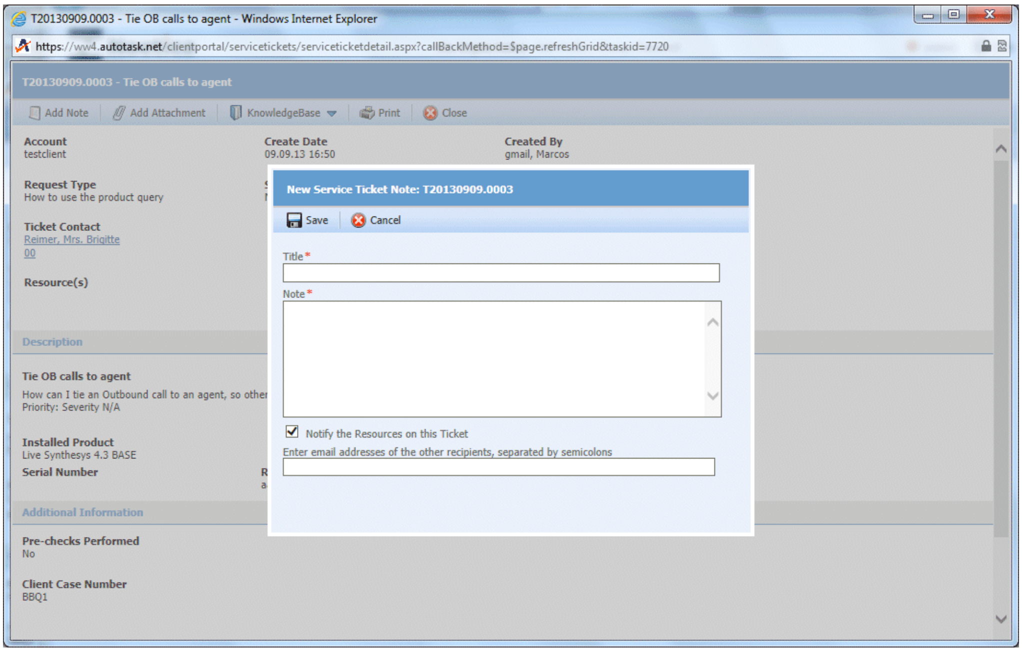
Options	Used to
Add Note	Track information, update status and communicate with internal /external resources and customers. All notes support email notification and can include attachments.
Add Attachment	Link a file to a ticket, project or Knowledgebase article, i.e. a screen shot of an error message or a Word document providing background information.
Knowledgebase	Search for information related to the request raised to help you solve your issue. The Knowledgebase can be launched via the **Knowledgebase** tab or the **Self Help** button in the *Description section*
Print	Print a ticket by selecting Print at the top of the ticket window.
Close	close the ticket

Adding a Ticket Note

Ticket notes are used to track information, update status, and to communicate with internal and external resources and customers. Notes can include attachments, and all notes support email notification.

To Add a Ticket Note

- Select and open the ticket for which you would like to add a note.
- Click the **Add Note** button to open the *Add Note* window:
- **Type a Title** for the note.
- Enter the contents of the note into the *Note* box.



- To send an email notification of your note to the ticket resources, select the **Notify the Resources on this Ticket** check box.
- Enter the email address of the other recipients, as required, separated by semicolons.

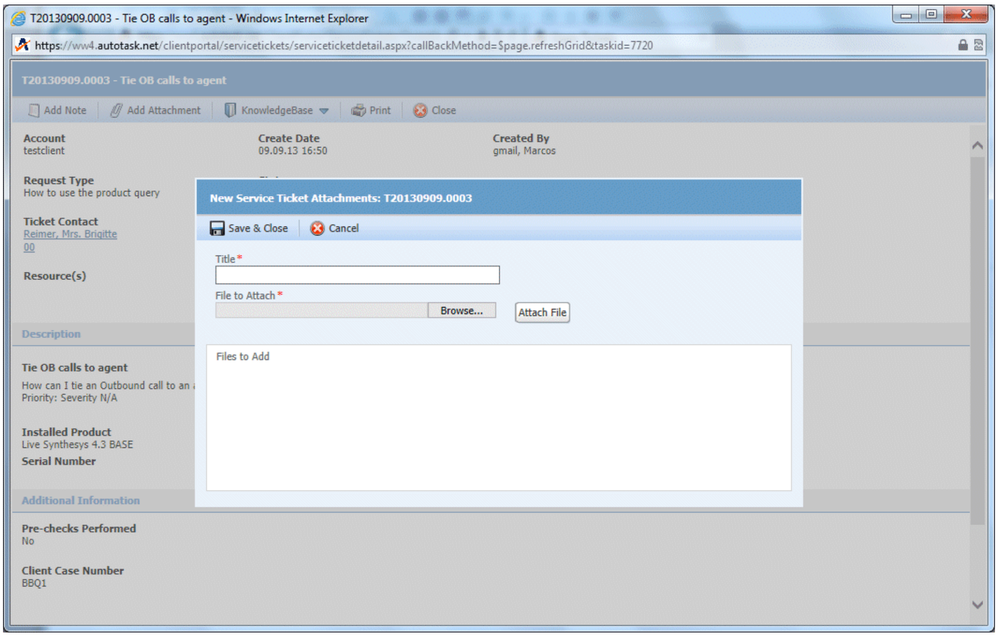
- Click **OK** to finish, or Cancel to close the *New Service Ticket Note* dialog without saving the changes.

Adding Attachments

An Attachment is a file that is linked to a ticket, project or Knowledgebase article, such as a screen shot of an error message or a Word document that provides background information.

To Add an Attachment

- Select and open the ticket and click the **Add Attachment** button.
- In the Add Attachment page, enter a **Title** for your attachment.
- Click the **Browse** button, to locate and select your attachment.
- Click **Attach File**. It will appear on the list at the bottom of the page.
- To create additional attachments for this item, repeat the above steps.
- To **remove** an attachment, click the **Delete** icon next to it in the list.



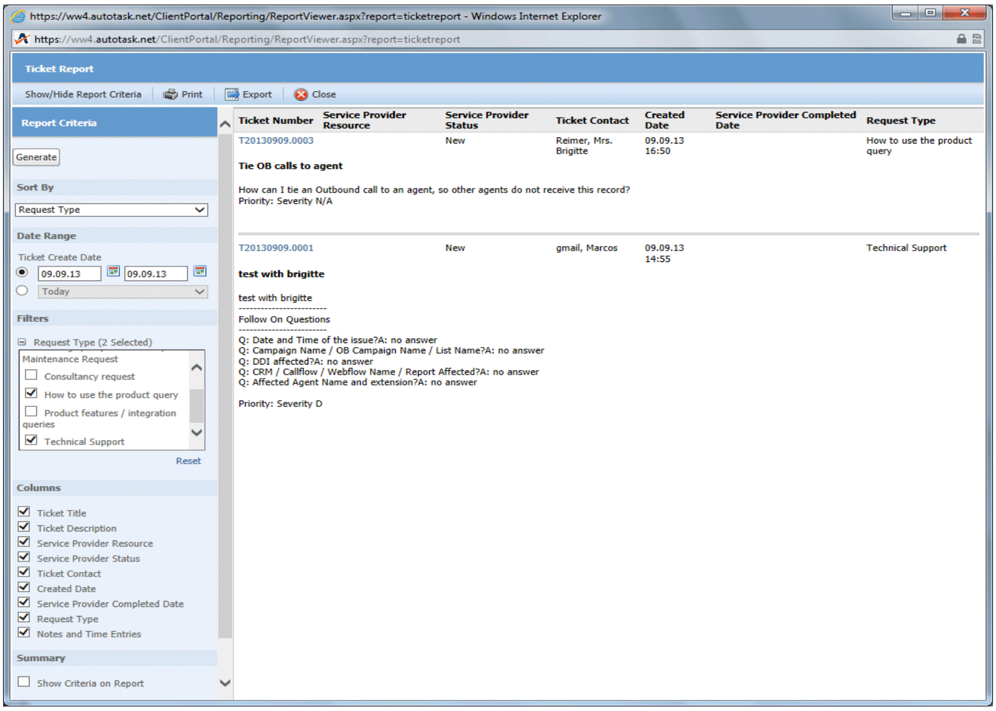
Supported File Types and Size

*The file size for uploaded attachments is limited to 10 MB. Autotask will **not accept** the following file formats:*
ade, adp, app, asp, aspx, bas, bat, cer, chm, class, cmd, cnt, com, cpl, crt, csh, cshtml, der, exe, fon, fxp, gadget, hlp, hpj, hta, inf, ini, ins, isp, its, iw, js, jse, ksh, lnk, mad, maf, mag, mam, maq, mar, mas, mat, mau, mav, maw, mda, mde, mdt, mdw, mdz, msc, msh, msh1, msh1xml, msh2, msh2xml, mshxml, msi, msp, mst, ops, osd, pcd, php, pif, plg, prf, prg, ps1, ps1xml, ps2, ps2xml, psc1, psc2, pst, reg, scf, scr, sct, shb, shs, tmp, url, vb, vbe, vbp, vbs, vsmacros, vsw, ws, wsc, wsf, wsh, xnk.

RUNNING TICKET REPORTS

To open a Ticket Report

- Click the **Reports** tab and select **Ticket Report** from the drop-down menu.
- The **Report Criteria** frame opens.
- Select your ***Sort By, Date Range, Filters,*** and ***Columns*** criteria, as required.
- Click **Generate**, to open the report in the right frame.



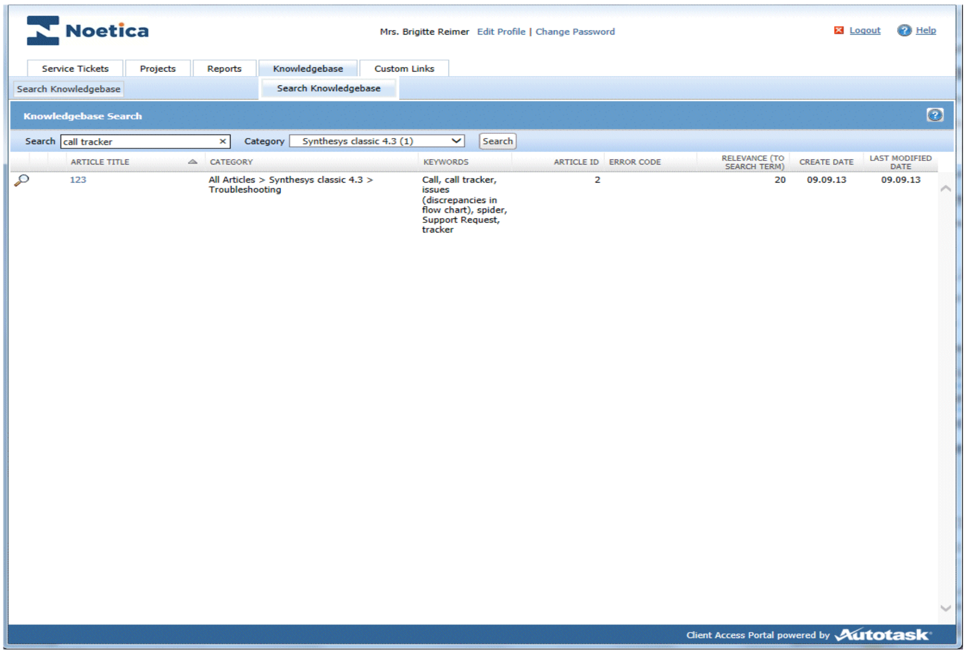
Report Criteria	**Options**
Sort By	*Sort options* include: Created Date; Request Type; Service Provider Completed Date; Service Provider Resource; Service Provider Status; Ticket Contact; Ticket Description; Ticket Number and Ticket Title.
Date Range	*Ticket Create Date:* Select the date range from the diary pages or from a drop down list, e.g. Today/ Yesterday, Current or Last Quarter/ Month/ Year; Last XXX days/ minutes/hours; Due In next/ Overdue at last XXX minutes/ hours.
Filters	*Select the Request Type*: All; Change/ Implementation/ Maintenance Request; Consultancy request; How to use the product use query; Product feature/ integration queries or Technical Support.
Columns	*Select the columns to be displayed*: Ticket title; Ticket Description; Service Provider Resource; Service Provider Status; Ticket Contact; Created Date and Service Provider Completed Date.
Summary	Tick the *Show Criteria on Report* checkbox to display selected criteria in your report.

THE NOETICA KNOWLEDGEBASE

Our Knowledgebase contains useful information that can help you solve your issues. The Knowledgebase can be launched from

- The **Knowledgebase** tab in the Customer Support Portal or
- Clicking the **Self Help** button on a Ticket dialog.

*When using the **Self Help** button on a Ticket, the Knowledgebase search page opens, automatically displaying the title of the ticket as the search term, and the search already executed and showing relevant results.*

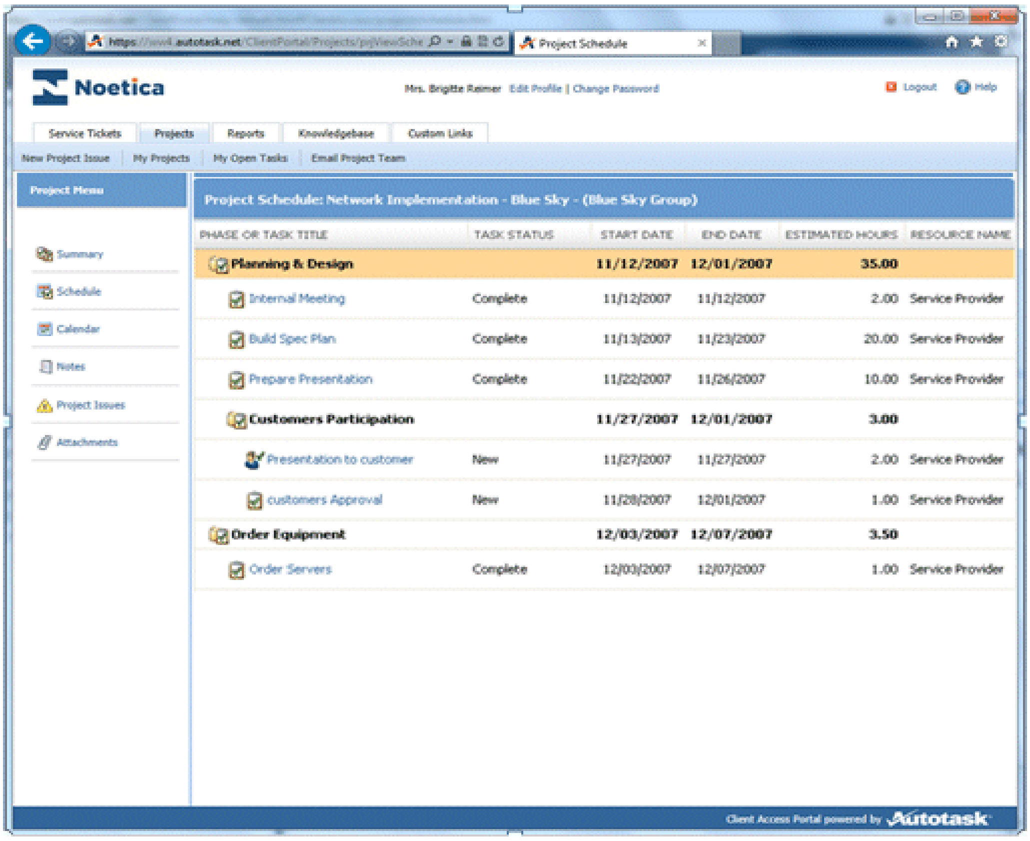


Searching the Knowledgebase

- Click the **Knowledgebase** tab in the ***Customer Support Portal*** and select **Search Knowledgebase**.
- Select a category from the **Category** menu to **narrow your search**, returning information in the selected category only.
- Click **Search**. All text and fields in Knowledgebase articles are searched.
- Click the **column header, to sort** your results in ascending order by any column. To sort in descending order, click the column header again.
- Open an article by clicking the title or the magnifying glass icon.

If you enter search terms in the Search box, use quotes around words to find an exact phrase. Otherwise, the search will return any of the words you enter in the Search box, plus any variations that begin with the word.

PROJECTS


Noetica
Mrs. Brigitte Reimer Edit Profile | Change Password
Logout
Help
Service Tickets
Projects
Reports
Knowledgebase
Custom Links
New Project Issue
My Projects
My Open Tasks
Email Project Team
Project Menu
Summary
Schedule
Calendar
Notes
Project Issues
Attachments
Project Schedule: Network Implementation - Blue Sky - (Blue Sky Group)
PHASE OR TASK TITLE
TASK STATUS
START DATE
END DATE
ESTIMATED HOURS
RESOURCE NAME
Planning & Design 11/12/2007 12/01/2007 35.00
Internal Meeting Complete 11/12/2007 11/12/2007 2.00 Service Provider
Build Spec Plan Complete 11/13/2007 11/23/2007 20.00 Service Provider
Prepare Presentation Complete 11/22/2007 11/26/2007 10.00 Service Provider
Customers Participation 11/27/2007 12/01/2007 3.00
Presentation to customer New 11/27/2007 11/27/2007 2.00 Service Provider
customers Approval New 11/28/2007 12/01/2007 1.00 Service Provider
Order Equipment 12/03/2007 12/07/2007 3.50
Order Servers Complete 12/03/2007 12/07/2007 1.00 Service Provider
Client Access Portal powered by Autotask

INTRODUCTION TO PROJECTS

For every new project a project lead is assigned to prepare a project plan, defining **Project Tasks** to be completed by our company, and **Client Tasks** for you to complete.

Ongoing projects that we have set up for your company can be viewed via the **Projects** tab in the **Customer Support Portal**, selecting *My Projects*.

Using the sub-navigation buttons *New Project Issue, My Open Tasks* and *Email Project Team*, you can add a new issue to an existing project, view and work on your open tasks/ work assignments and send an email to your project team.

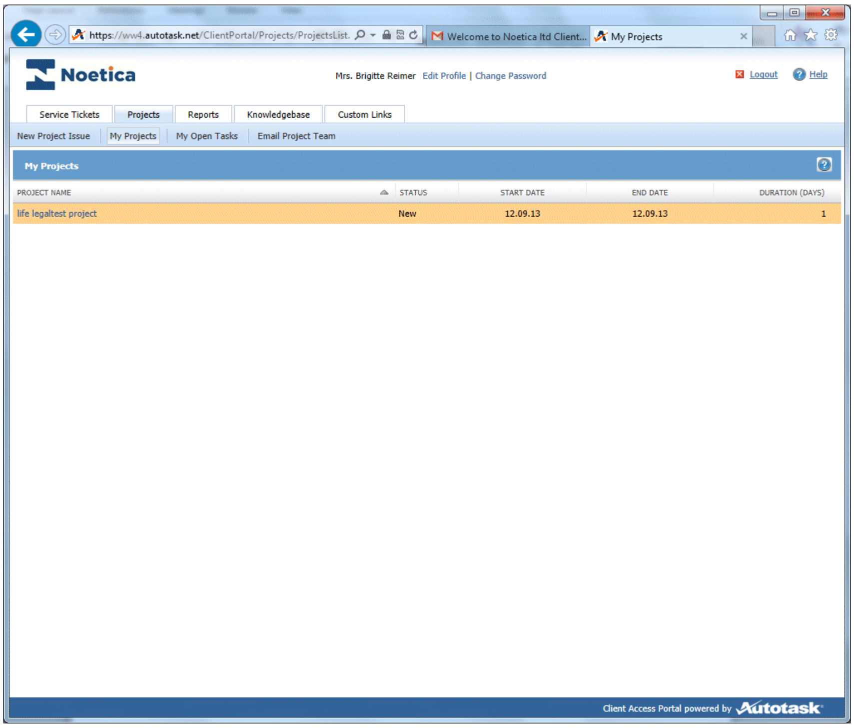
Tasks can be tracked at the project level, or as part of a phase or sub-phase. Issues added to a project become a project task and appear on the schedule at the project level (not within a phase or sub-phase).

VIEWING EXISTING PROJECTS

As a team member on a project, or as team leader with the required access permissions, you can view the ongoing projects that we have set up for your company.

- Go to the **Projects** tab and select **My Projects** from the drop-down menu**,** to display the project list.
- To open a specific project, click the project name in the list.

When you are in the Projects module, you can also access the sub-navigation buttons **New Project Issue**, **My Projects, My Open Tasks** and **Email Project Team.**



Option	**Used to**
New Project Issue	Add a new item to an existing project
My Projects	View a list of existing projects
My Open Tasks	View your tasks that still require action
Email Project Team	Send an email to your project team

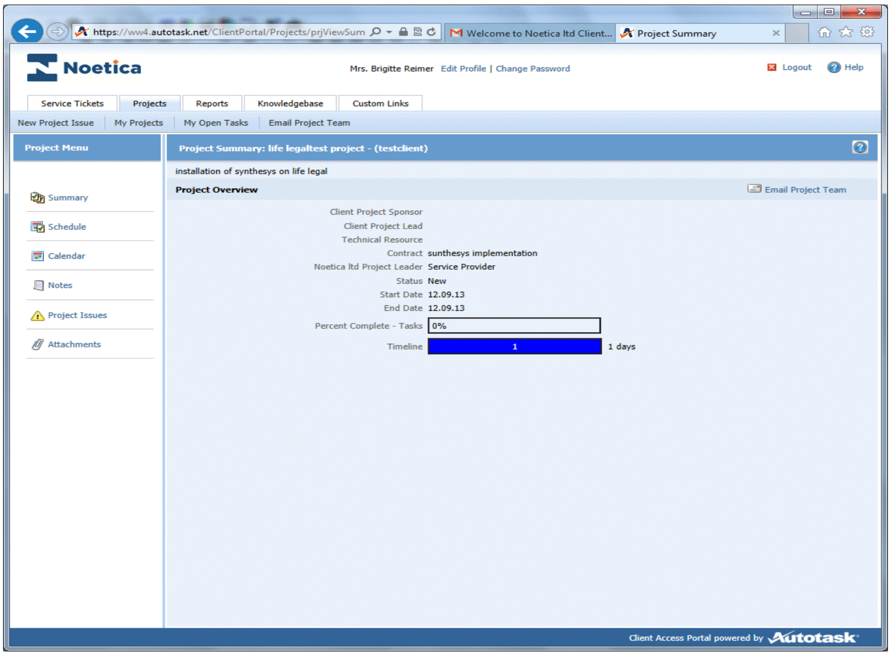
Viewing a Project Summary

The project summary page provides a snapshot view of the project and enables you to quickly assess the project's current status, and who to contact at our company for additional information.

To View the Project Summary

- Go to the **Projects** tab and select **My Projects** from the drop-down menu**,** to display the project list.
- Click on the project that you wish to view to open the Project Summary screen.

In the Project Summary screen you can now view project specific information, and email the project team, using the *Email Project Team* link at the top of the page.



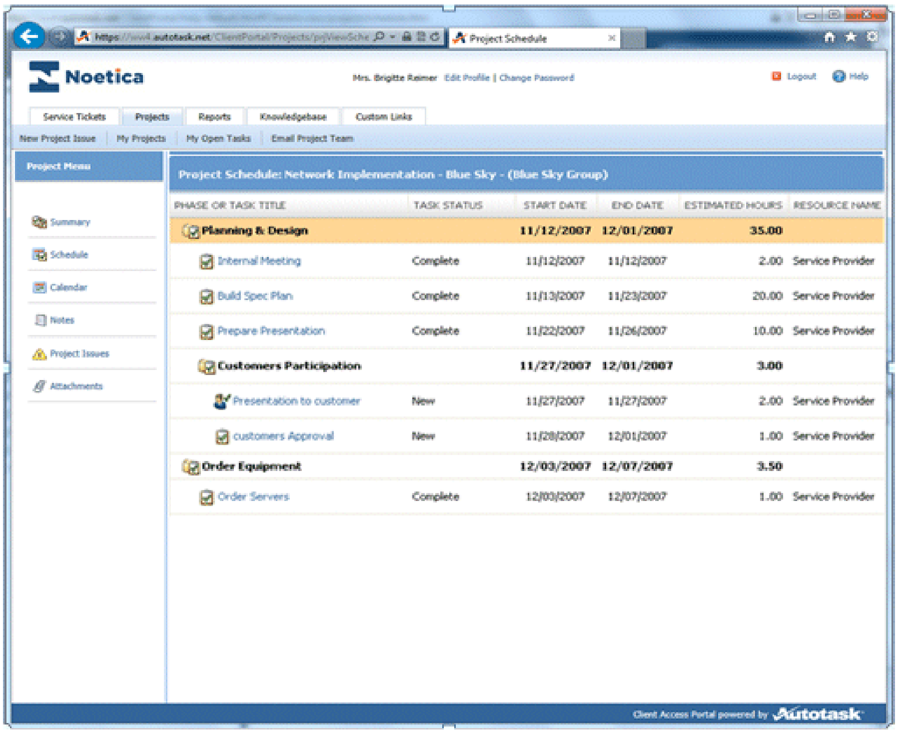
Project Menu	To view
Summary	A snapshot of the project with information about the project's current status and who to contact at our company for additional information.
Schedule	An outline of the project, including its phases and all the tasks that are associated with it.
Calendar	events that a project team member has added to the project, i.e. meetings, webinars, days off, etc.
Notes	And share information about status, progress, and other issues with project team members.
Project Issues	Tasks or problems that arise after the original project schedule is developed.
Attachments	Additional information regarding the project.

Viewing a Project Schedule

The project schedule shows you an outline of the project, including its phases and all associated tasks. To view the Project Schedule:

- Go to the **Projects** tab and select **My Projects** from the drop-down menu**,** to display the project list.
- Click on the project that you wish to view to open the Project Summary screen.
- In the ***Project Summary*** page click the **Schedule** link in the left navigation frame, to open the **Project Tasks** page.

The **Project Tasks** page lists all project-level tasks and issues in chronological order, grouped by any phases that have been defined.



Viewing a Project Calendar

The project calendar shows events that a project team member has added to the project. This could include meetings, webinars, days off, etc. To View the Project Calendar:

- In the Project Summary page, click the Calendar link in the left navigation frame, to open the Project Calendar in *List View*, displaying events chronologically.

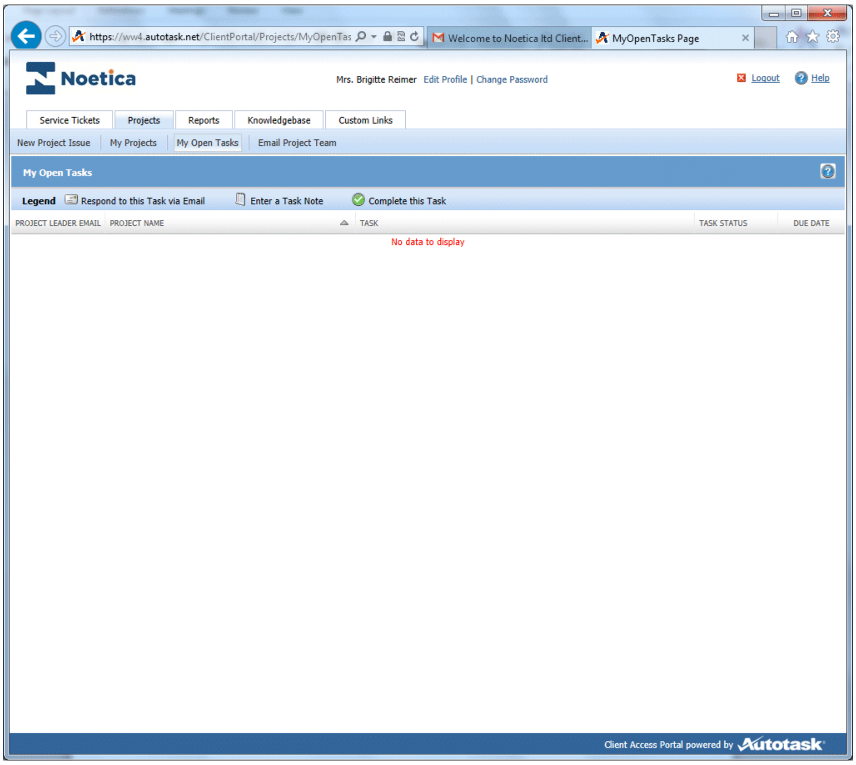
To **print details** of a particular event, click on the event. The details will display in the bottom frame of the page. Click Print.

UPDATING PROJECTS

The core element of a project is the project schedule and associated tasks, i.e. the specific work assignments that you or another team member must complete. If your permissions permit it, you can also see who has been assigned to the task from our company.

Your tasks will appear on your **My Open Tasks** page, if the task is assigned to you, or if the task has a status of "Waiting Customer." To open your task list:

- Go to the **Projects** tab and select ***My Open Tasks***.
- Click the *Task* name, to open the **Task Details** window in *List View*, displaying all task notes and time entries.
- To close the Task Details window click **Cancel.**



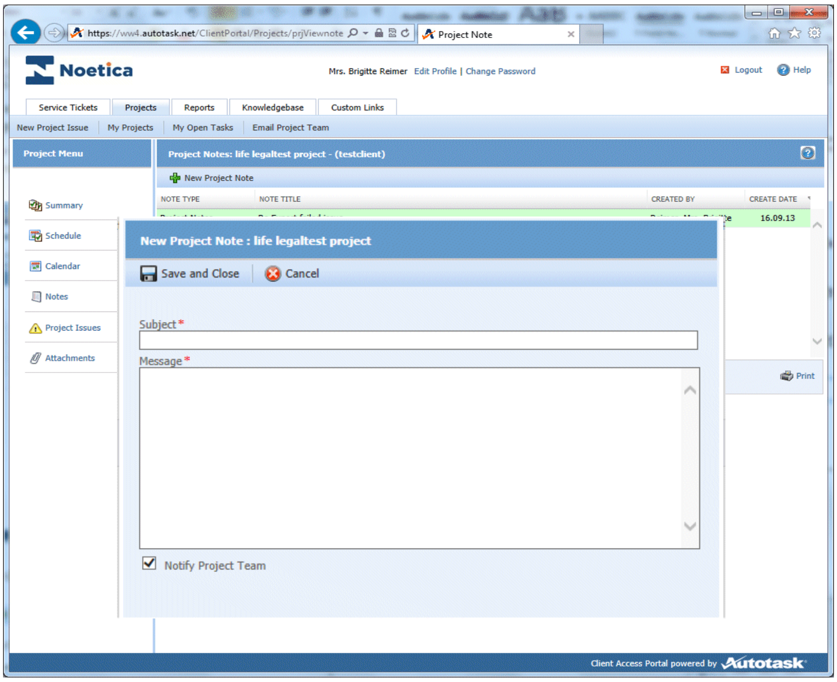
Option	Used to
Respond to the Task via Email	Send an email to the project team
Enter a Task Note	Add a note to your task
Complete a Task	Complete a task, clicking the green checkmark

Viewing and Adding Project Notes

Project notes are used to communicate status, progress, and other issues with project team members. You can also open any attachments that we have added to a note, but you will not be able to add your own attachments through Customer Support Portal.

To view a Project Note

- In the **My Projects** dialog, click on the project that you wish to view.
- In the ***Project Summary*** page now displayed, click the **Notes link** in the left navigation frame, to open the project note list.
- Click the note that you would like to view to open it in the preview pane at the bottom of the page.
- To view attachments added to the note, click the **Attachment** icon and select the attachment in the preview pane.



Print Note option

To add a new Project Note

- Click New Project Note , to open the ***New Project Note*** window.
- Enter a title for the new note into the **Subject** field**.**
- Enter any relevant information into the **Message** section.
- To notify all active project team members, tick the **Notify Project Team** checkbox.
- Click Save and Close.

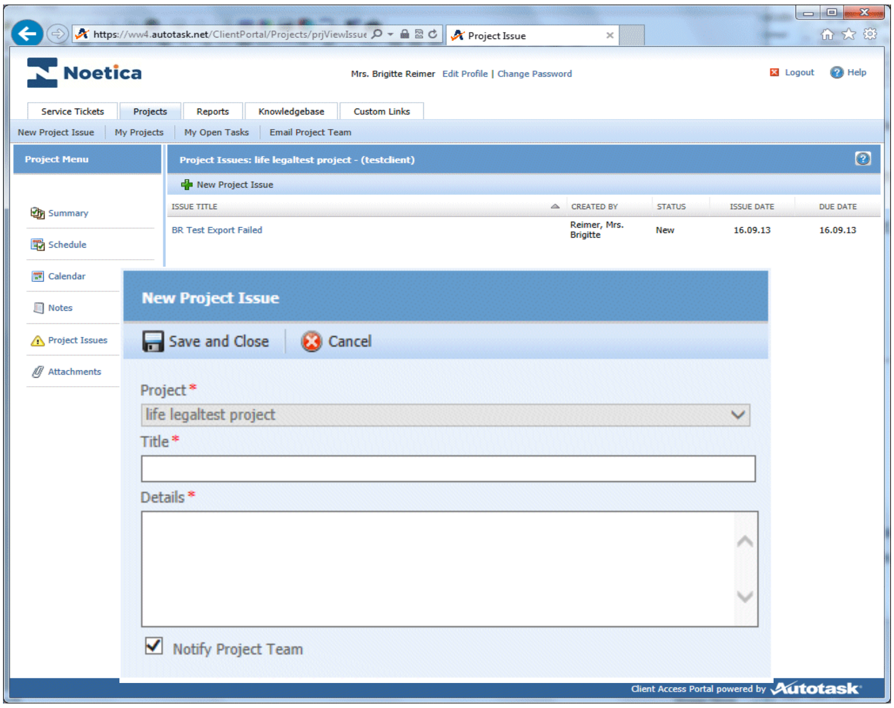
To print details, select the note in the *Project Notes* page to display details and click **Print**.

Viewing and Adding Project Issues

A project issue is a task or problem that arises after the original project schedule is developed. When you add an issue through the Customer Support Portal, it will appear in the *Project Schedule* as well as on the *Project Issues* page. You can open the task from either location.

To view a Project Issue

- In the **My Projects** dialog, click on the project that you wish to view.
- In the ***Project Summary*** page now displayed, click the **Project Issues** link in the left navigation frame.



To add a new Project Issue

- Click New Project Issue, to open the New Project Issue window.
- Enter a title for the new issue into the **Title** field**.**
- Enter any relevant information into the **Details** section.
- Click Save and Close.

The issue appears on the Project Issue page, as well as in the project schedule. In the schedule, it will appear last in the task list and will be at the project level, not as part of a project phase.

The project lead is assigned as the resource and all active team members receive an email notification with details about the new issue. In addition, the issue will also show up on the Project Manager's Dashboard.

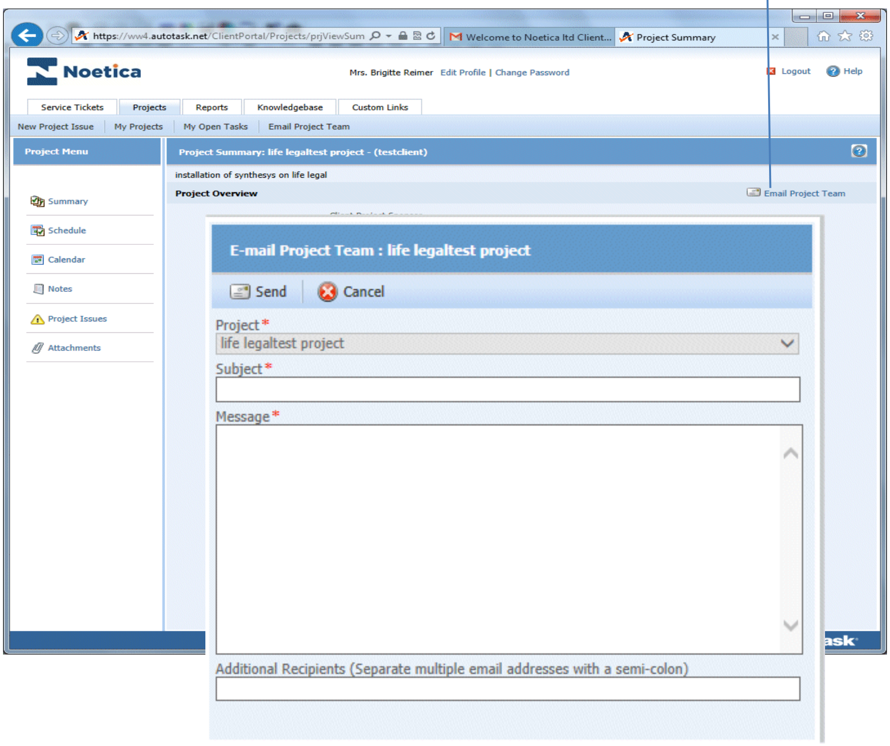
Emailing the Project Team

In the Customer Support Portal you can view the team members that form part of the project team, provided your Security Level allows it.

It is also possible to send an email to the entire project team, even if you do not know all project members or all their email addresses.

To email the Project Team

- In the **My Projects** dialog, click on the project that you wish to view.
- In the ***Project Summary*** page now displayed, click the **Email Project Team** link in the left navigation frame, to open the Email Project Team view, with the current project selected.



- Enter a title for the email into the **Subject** field.
- Enter the required details into the **Message** section.

Viewing Project Costs

Project Costs track project-related costs and revenue for items other than labor. You may be billed for these costs as part of your project billing.

Examples of project costs are hardware and software costs, and incidentals such as delivery charges. Change orders for project tasks will also appear on the Cost View.

To View Project Costs

- Click the Projects tab and select My Projects from the drop-down list.
- Click the project you would like to open. The Project Summary page opens.
- On the left navigation frame, click the Costs link to open the Project Costs view.
- Click Print if you would like to print the list of costs.

NOTES

NOTES