Customer Portal

User's Guide

Version 1.4

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Beta Systems DCI Software AG
Alt-Moabit 90d
D-10559 Berlin

www.betasystems-dci.com

Support Contact Information

support@betasystems.com

Telephone Germany:
0800-BETASYS (or 0800-2382797)

Telephone International:
+49 (0)6321 499 15 108

Contents

Introduction

In this chapter

Introduction customer portal

Overview

You can submit your requests to the support team via the customer portal. For each of your requests, a ticket is automatically created.

The customer portal enables you to view all of your tickets and to track their processing status. Additionally, you will be informed automatically by email whenever the status of the ticket changes.

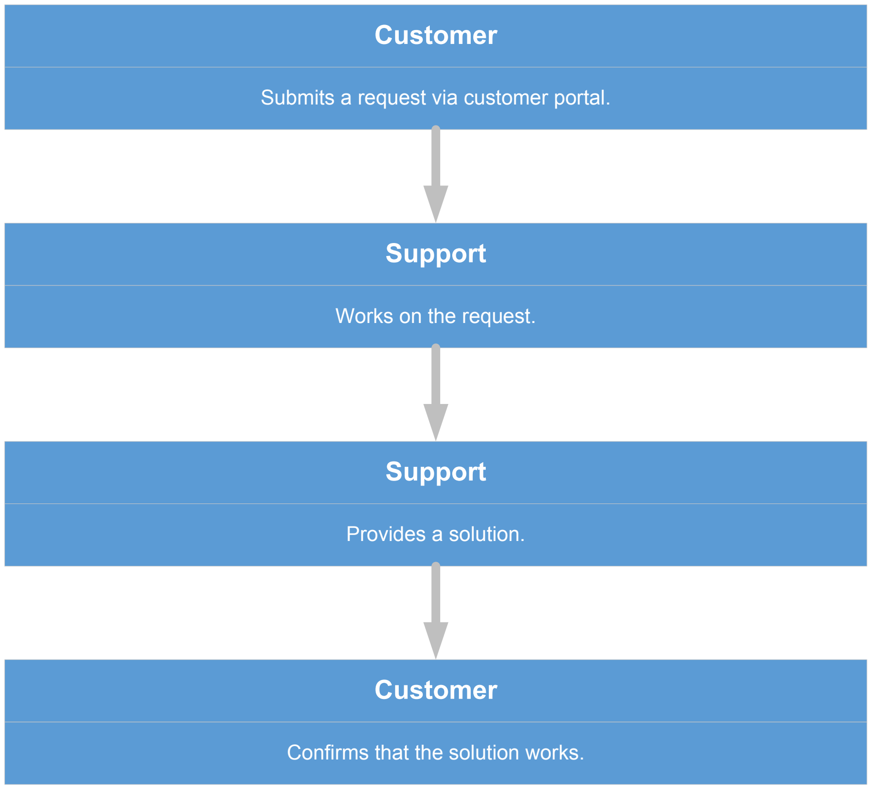
To use the customer portal, you have to register once.

Note:

- Customer Help Desk (CHD) is replaced by the customer portal. New requests can only be submitted via the customer portal. Tickets that have already been submitted via CHD will continue to be processed in CHD. Existing CHD tickets will not be migrated to the customer portal.

Process of ticket handling

The following screenshot shows the process of ticket handling.



System requirements

Supported web browsers

The customer portal supports the following web browsers:

Chrome	• Latest stable version
Internet Explorer	• Version 10.0, 11.0 **Note:** Compatibility view is not supported.
Mozilla Firefox	• Latest stable version
Safari	• Latest stable version on Mac OS X
Safari for iOS, iPod touch, iPhone	• Latest stable version
Android	• Default browser on Android 4.0.3 (Ice Cream Sandwich)

First steps

In this chapter

Registering for the customer portal

Overview

Before you can use the customer portal, you have to register once.

Note: Service partners or distributors please note the information given under "Procedure for service partners or distributors" on page 31.

Registering for the customer portal

To register for the customer portal:

- Inform the support team via email (support@betasystems.com) that you need access to the customer portal.

  The support team will need the following information:

  - Your email address

    This email address is required for the customer portal login.

  - Product assignment

    Specify your Beta Systems products.

  - Desired notifications (optional)

    Optionally, specify for which status changes of your tickets you want to be informed by email.

    For further details see "Defining notifications" on page 27.

  - Specifying predefined participants (optional)

    Optionally, specify one or more persons as representatives (so-called predefined participants). A predefined participant is able to view and edit all your requests.

    Note: Predefined participants must also be registered for the customer portal.

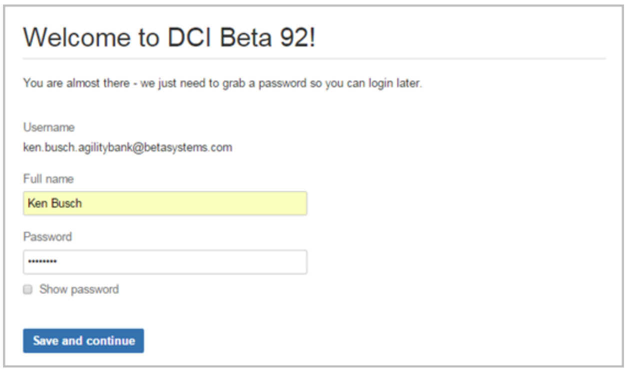
  The support team creates an account and sends you an invitation email.

Completing registration

To complete registration:

1. Click the **Visit portal** link in your invitation email.

   The logon screen is displayed.



2. Enter the required information:
   - Enter your full name in the **Full name** field.
   - Specify a password in the **Password** field.
3. Click **Save and continue**.

   You can now log in to the customer portal with your email address and password.

Logging in and out from the customer portal

Logging in to the customer portal

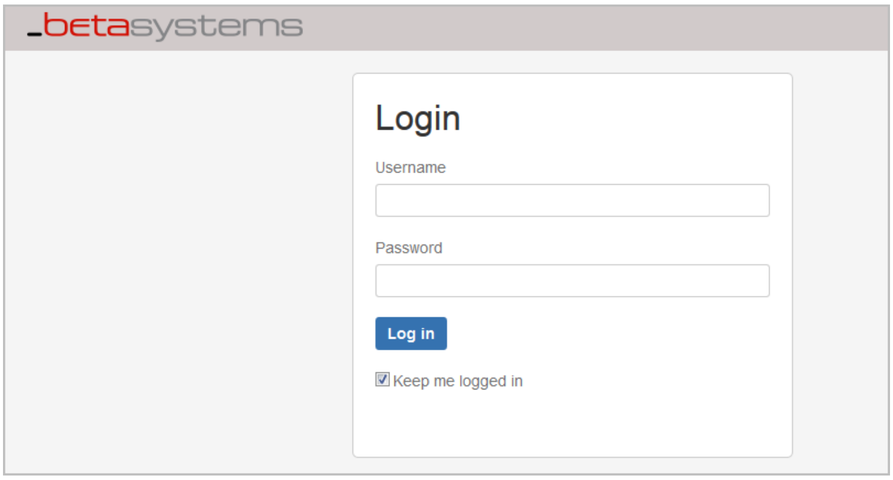
To log in to the customer portal:

1. Enter one of the following URLs in the address bar of your web browser:
   - For the DCI customer portal:

     `http://support.betasystems.com/dci-online-support.html`
   - For the IAM customer portal:

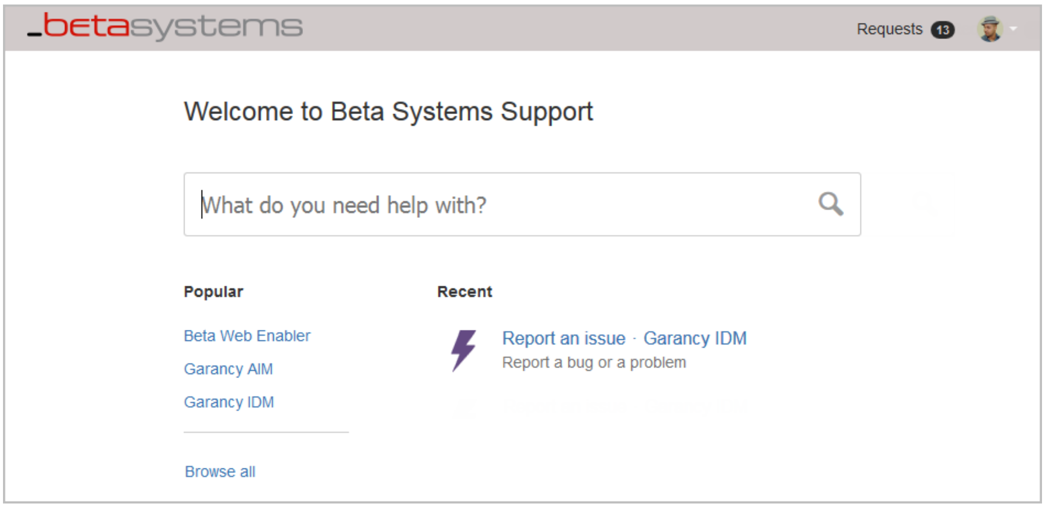
     `http://support.betasystems.com/iam-online-support.html`
2. Click **TO DCI ONLINE SUPPORT PORTAL** or **TO IAM ONLINE SUPPORT PORTAL**.

   The login screen is displayed.



3. Enter your email address (**Username** field) and your password (**Password** field).
4. Click **Log in**.

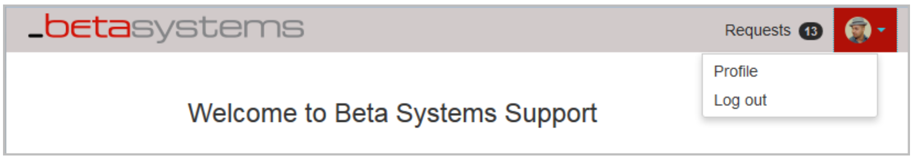
   The start page of the customer portal is displayed.



Logging out of the customer portal

To log out of the customer portal:

1. Click on the profile picture.



2. Select **Log out** in the displayed menu.

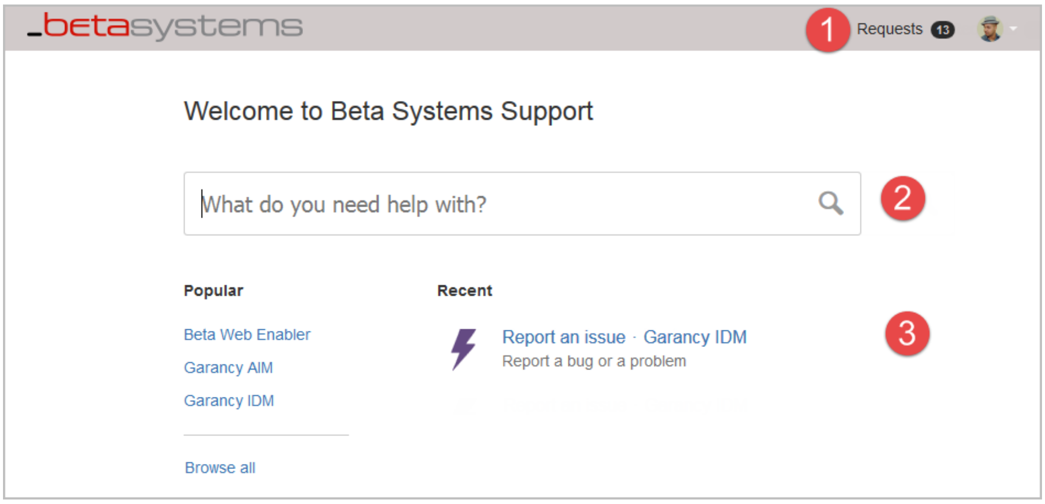
Structure of the start page

Overview

After logging in to the customer portal, the start page is displayed.

Structure of the start page

The start page is structured as follows:



1 This line is always displayed.

Requests shows the number of open requests.

Clicking the profile picture opens a menu that allows you to change your profile settings or to log out.

2 The input field can be used to search for a product.

3 Displays the products for which you can create tickets.

Popular displays the most commonly used products.

Recent displays the products you have recently used.

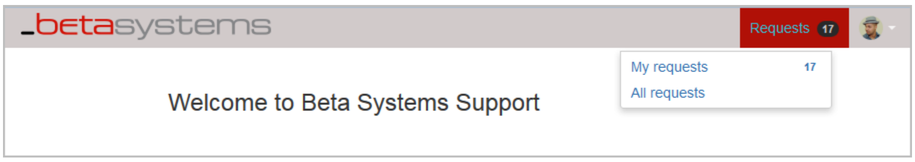
Clicking **Browse all** displays all products for which you can create tickets.

Requests

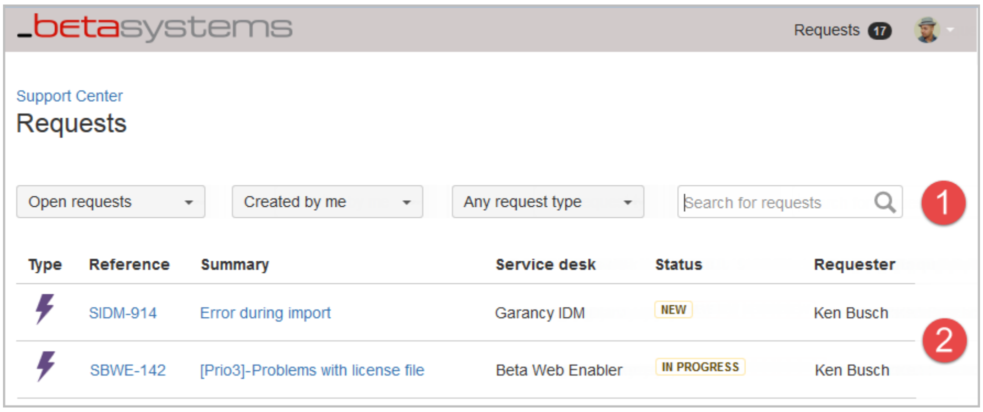
You can display all tickets that you have created or where you have been assigned as participant.

Clicking **Requests** opens a menu where you have the following options:

- **My requests** displays only the requests that you have created.
- **All requests** displays all requests that you have created or where you have been assigned as participant.



The pages **My requests** and **All requests** are structured as follows:



1 Search and filter bar to filter the displayed tickets.

The first field can be used to filter by ticket status:

- **Open requests** displays only the open requests.
- **All requests** displays all tickets.
- **Closed requests** displays only the closed tickets.

Note: Tickets with status **Resolved** are only displayed under **All requests** and **Closed requests**.

The second field can be used to filter by creator:

- **Created by me** displays only the tickets you have created.
- **Created by anyone** displays all tickets that you have created or where you have been assigned as participant.
- **Where I am a participant** displays only the tickets where you have been assigned as participant.

The third field can be used to filter by product.

The last field can be used to enter a search term.

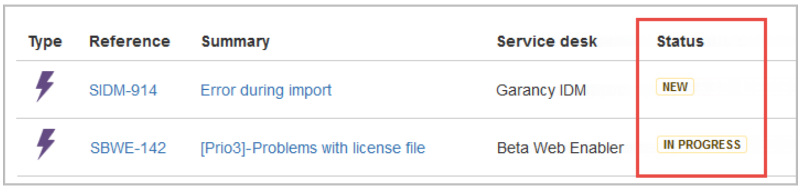
2 This area displays all tickets that match the specified filter criteria.

For each ticket, the priority and ticket title, the product concerned, the ticket status, and the name of the person who created the ticket are displayed. You can access the desired ticket by clicking the ticket number (**Reference** column) or ticket description (**Summary** column).

Ticket status

Overview

When you submit a request, a ticket is automatically created. The displayed ticket status allows you to view and track the processing status of the ticket.



Type	Reference	Summary	Service desk	Status
	SIDM-914	Error during import	Garancy IDM	NEW
	SBWE-142	[Prio3]-Problems with license file	Beta Web Enabler	IN PROGRESS

When the status of your ticket changes, you will be informed automatically by email.

If you only want to be informed when a particular ticket status has been reached, you can make adjustments to the respective ticket yourself, or the support team can adjust the settings to your needs. For further details, see "Defining notifications" on page 27.

Ticket status

The following ticket statuses can be displayed.

Ticket status	Meaning
New	A ticket has been created, but has not yet been processed.
In Progress	The ticket is processed by support team.
In Progress by 3rd Party	The ticket is processed by third party.
In Progress by Development	The ticket is processed by development.
Information needed	The support team needs further information from you.
Waiting for Support	You have sent new information to the support team (for example by adding a new comment or attachment).
Resolved - Confirmation needed	The support team has provided a solution. You have to confirm the solution.
Closed	The ticket has been closed by support team.

Creating and editing tickets

In this chapter

Submitting requests

Overview

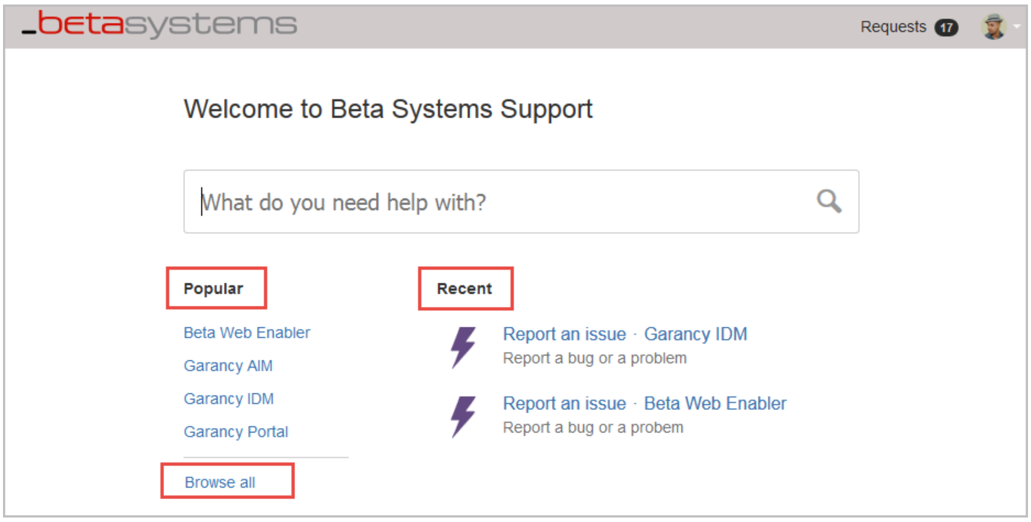
You can submit your requests to the support team. For each request, a ticket is automatically created.

Submitting a request

To submit a request:

1. Open the start page.
2. Select the product for which you want to submit a request under **Popular** or by clicking **Browse all**, then click **Report an issue**.

   If the product for which you want to submit a request is already displayed under **Recent**, you can directly click **Report an issue - *ProductName***.

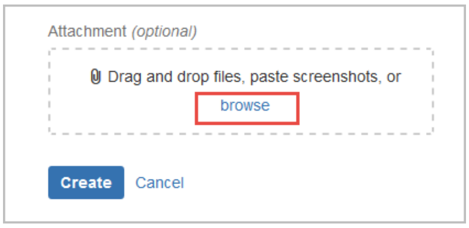


   An input form is displayed.

3. Make all the necessary entries.
4. Optionally, you can add one or more attachments (for example, screenshots or logs).

   To add an attachment, do one of the following:

   - Select the attachment you want to add and drag it at any position into the ticket.
   - Click **browse** in the **Attachment** field and select the desired attachment.



5. Click **Create** to submit your request to the support team.

   A ticket is automatically created and you will get a confirmation email.

Input fields

Depending on the selected product, the following fields can be displayed in the input form.

Field	Description
Add. Config. Info	Specify additional information about configuration.
Add. Fixes	Specify installed fix packs.
Add. PTF/Fix Level	Specify the PTF level you are using.
Advice to Support	Select the attachments you have added.
Affects Version	Select the affected product version.
Affects Version (BSA)	Select the affected BSA version.
Affects Version (Product)	Select the affected product version.
Agent or add. Fix Level	Specify the agent build or PTF level you are using.
Archive Type	Select the archive system you are using.
Attachment	Here you can add an attachment.
Backend Version(s)	Specify the version of the backend system you are using.
BPW Version	Specify the BPW version you are using.
BSA Level	Specify the BSA level you are using.
Component	Select the affected component. Multiple selection is possible.
Customer Ticket No.	If you have an internal reference number for the ticket, you can specify this number here.
Description	Describe the problem as exactly as possible.
Environment	Provide information on the environment you are using (for example operating system, service pack etc.).
Functions	Select the function you are using. Multiple selection is possible.
Hotfix	Specify installed hotfixes.
Installation Type	Select the installation type.
Java Version	Select the Java version you are using.
Module/STC	Specify the modules/STC.
Partner Ticket No.	If you have the reference number of the OEM partner, you can specify this number here.

Field	Description
Patchlevel/Builddate	Specify the patch level/build date you are using.
Platform	Select the platform you are using.
Product	Select the product you are using. Multiple selection is possible.
Products	If the product you are using is not displayed under "Product", you can specify this product here.
Server Platform	Select the platform you are using.
Summary	Enter a short description of the problem.
Ticket No.	If you have an internal reference number for the ticket, you can specify this number here.
Used Backend(s)	Select the backend system you are using. Multiple selection is possible.
Web Application Server	Select the web application server you are using.
z/OS Security	Select the z/OS security you are using.

Adding attachments

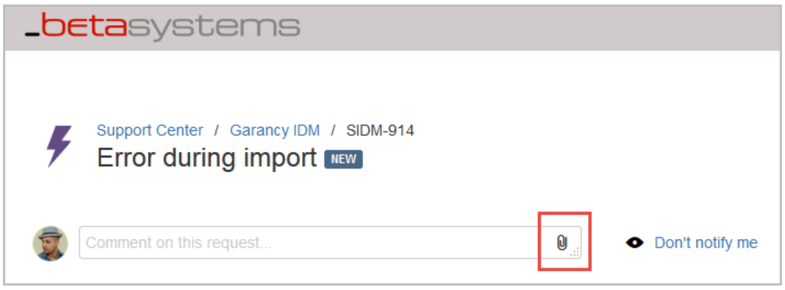
Overview

You can add attachments (for example screenshots or log files) to your tickets and to tickets where you have been assigned as participant. You can add attachments when you create the ticket or at a later point in time.

Adding an attachment

To add an attachment:

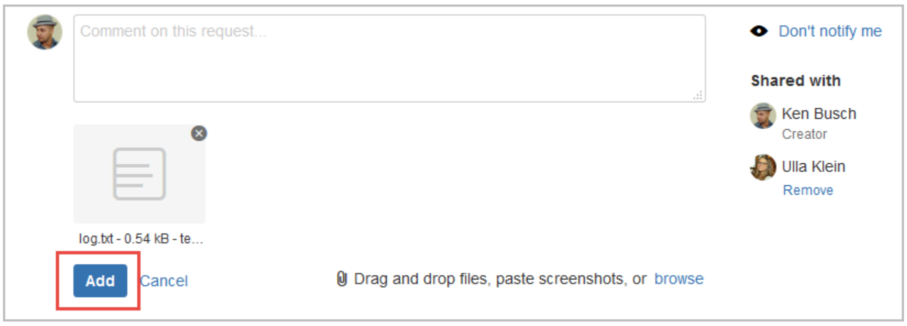
1. Open the desired ticket.
2. Do one of the following:
   - Select the attachment you want to add and drag it at any position into the ticket.
   - Click on the clip in the comment field and select the document you want to add as attachment.



Note: The size of an attachment is limited to 100 MB. If you want to upload attachments larger than 100 MB, you have to use the FTP server. For necessary access data, please contact our support team.

The selected attachment is displayed below the comment field. You can remove this attachment by clicking ⊗ .

3. You can use the comment field to add additional information.
4. Click **Add** to add the attachment.



Adding comments

Overview

You can add comments to your tickets and to tickets where you have been assigned as participant. You can add comments when you create the ticket or at a later point in time.

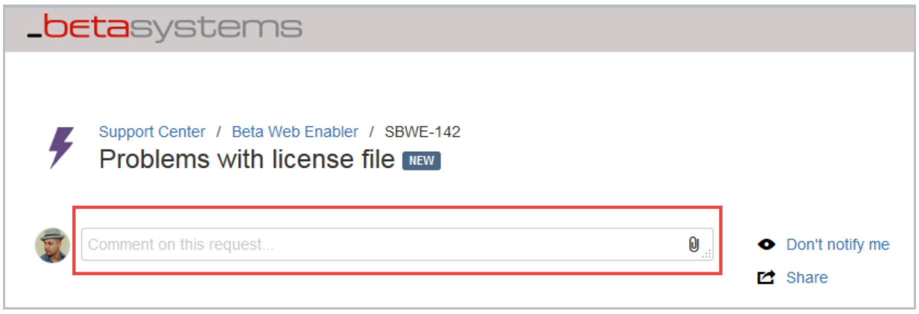
This might be the case, for example, if you have questions regarding the processing status or if you want to add additional information to the ticket.

Note: When you add a comment, the status of the ticket changes automatically.

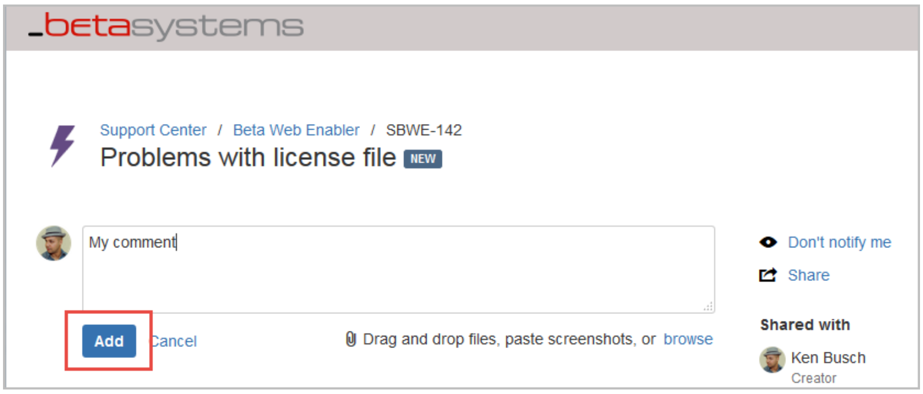
Adding a comment

To add a comment:

1. Open the desired ticket.
2. Enter your comment in the comment field.



3. Click **Add** to add the comment.



Closing tickets

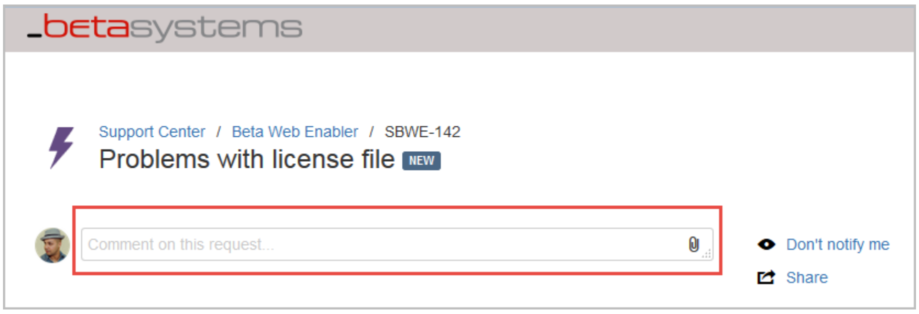
Overview

Inform the support team if the solution they provided works in order to enable them to close the ticket.

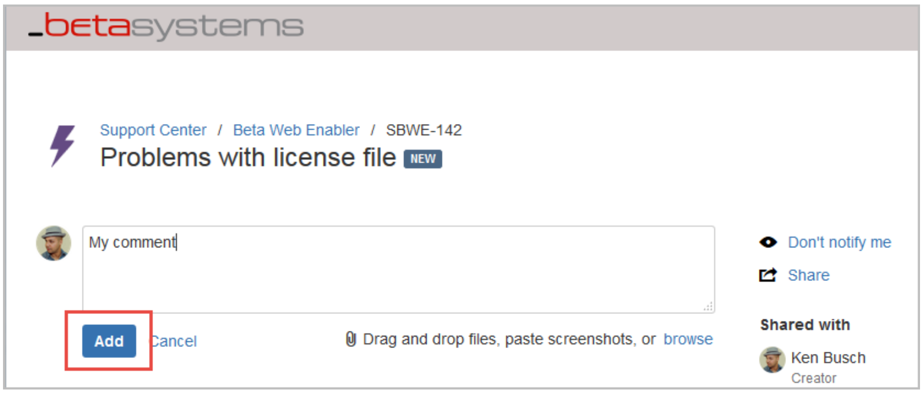
Closing a ticket

To close a ticket:

1. Open the desired ticket.
2. Use the comment field to inform the support team that the solution works.



3. To add the comment, click **Add**.



The ticket is closed by the support team.

Displaying existing tickets

Overview

You can view all tickets that have been created by you or where you have been assigned as participant.

Displaying a ticket

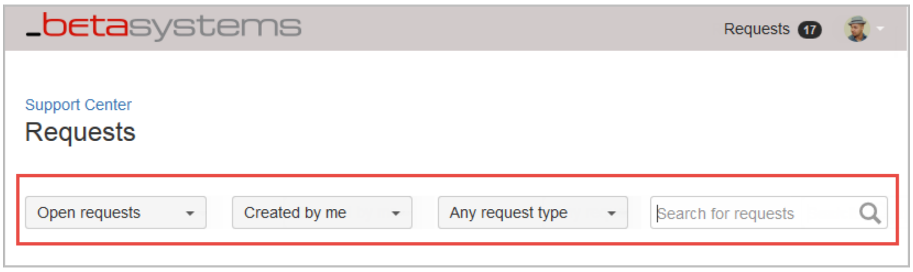
To display a ticket:

1. Select **Requests**.

2. Do one of the following:
   - Clicking **My requests** displays only the tickets that have been created by you.
   - Clicking **All requests** displays all tickets that have been created by you or where you have been assigned as participant.

   The **Request** page is displayed. By default, only the open tickets are displayed.

3. Optionally, you can use the search and filter bar to filter the displayed tickets.



The first field can be used to filter by ticket status:

- **Open requests** displays only the open requests.
- **All requests** displays all tickets.
- **Closed requests** displays only the closed tickets.

Note: Tickets with status **Resolved** are only displayed under **Closed requests** and **All requests**.

The second field can be used to filter by creator:

- **Created by me** displays only the tickets you have created.
- **Created by anyone** displays all tickets that you have created or where you have been assigned as participant.
- **Where I am a participant** displays only the tickets where you have been assigned as participant.

The third field can be used to filter by product.

The last field can be used to enter a search term.

4. You can access the desired ticket by clicking the ticket number (**Reference** column) or ticket description (**Summary** column).

   The detail view of the ticket is displayed.

Advanced functions

In this chapter

Appointing participants

Overview

You can appoint one or more participants for your tickets. A participant is allowed to view and edit all tickets you have created.

Note: Appointing someone as your participant does not give you access to this person's ticket. Only by being appointed as participant yourself do you get access.

You can remove an assigned participant at any time.

There are the following types of participants:

- Predefined participants

  A predefined participant is automatically added to every ticket you create.
- Ad hoc participants

  You can add an ad hoc participant to any ticket you want.

Note: Participants need to be registered for the customer portal.

Assigning predefined participants

Predefined participants can only be assigned by the support team. Inform the support team about desired participants. Once the participant has been assigned, this participant is added to each ticket you create from that moment.

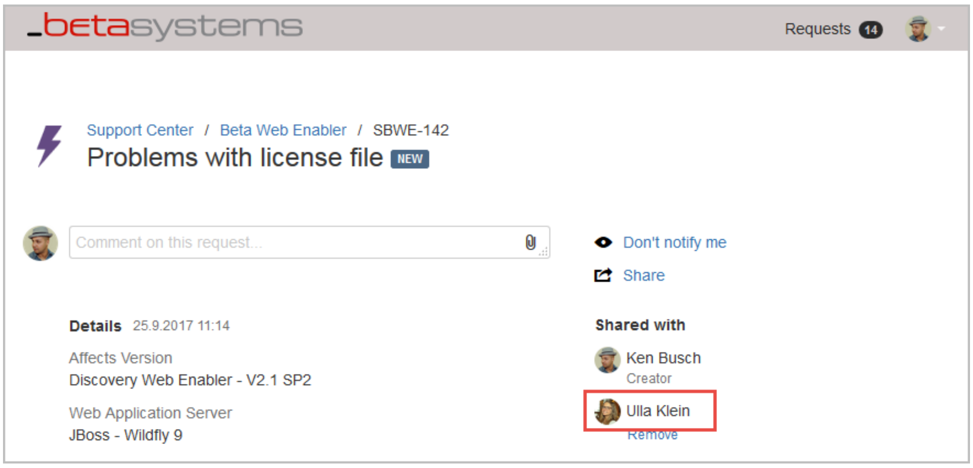
Assigning ad hoc participants

To assign an ad hoc participant:

1. Open the ticket where you want to add a participant.
2. Click **Share**.

3. Enter the email address of the person you want to add as participant and click **Share**.

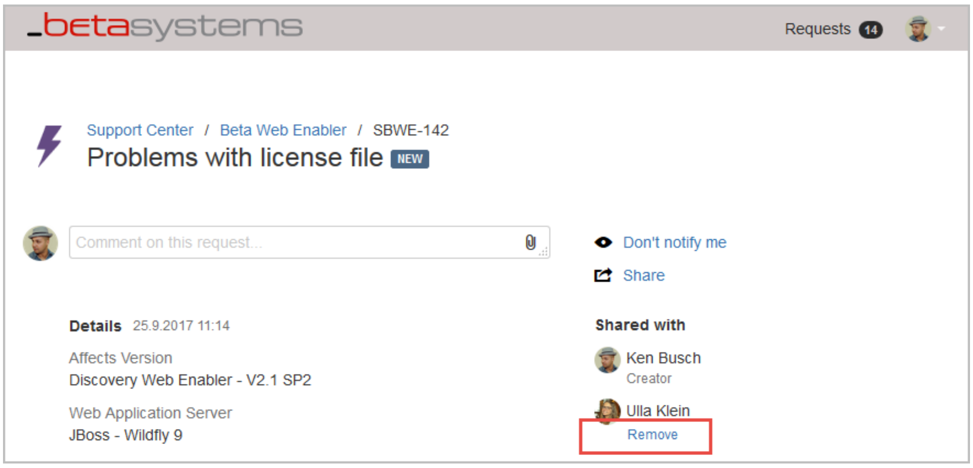
   The name of the added participant is displayed on the right-hand side of the ticket.



Removing participants

To remove a participant:

1. Open the desired ticket.
2. Click **Remove** below the displayed participant name to remove the participant.



Defining notifications

Automatic notifications

You can inform the support team for which ticket changes you want to be informed automatically by email, or you can activate or deactivate the notifications for the desired ticket yourself (see page 28).

You can also provide the support team with email addresses of persons who are not registered for the customer portal but also need to be informed about changes in status.

We also recommend to set up a group mailbox and inform the support team of the email address of this group mailbox. A group mailbox allows you to define which users can access this group mailbox. Furthermore a group mailbox provides a better overview of existing tickets. No matter who has created the ticket, a notification is also sent to this group mailbox whenever the status of the ticket changes.

Default setting

You will be informed automatically by email if one of the changes mentioned below occurs for a ticket that is created by you or where you have been added as participant. The support team can adjust these notification settings to your needs.

Occasion	**Meaning**
New	A ticket has been created, but has not yet been processed.
In Progress	The ticket is processed.
Information needed	The support team needs further information from you.
Customer's answer	You have sent the requested information to the support team.
Feedback	The support team sends feedback.
Resolved - Confirmation needed	The support team has provided a solution.
Closed	The ticket has been closed by support team.

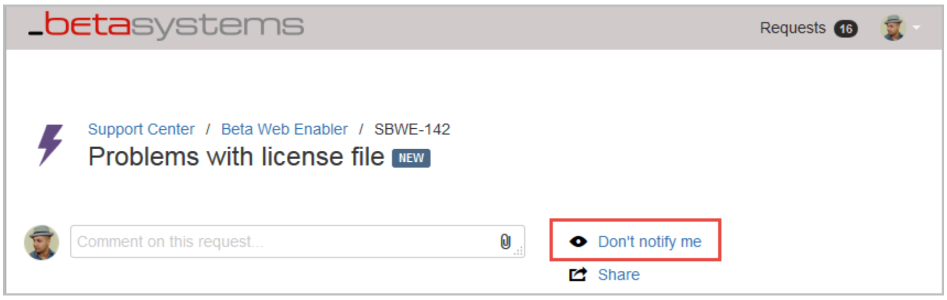
Activating or deactivating notifications

You will be informed automatically by email if the status of a ticket that has been created by you or where you have been added as participant has changed. If you do not want to be informed every time the status changes, you can deactivate the notifications for the desired ticket. In this case you will only get a notification if the ticket is set to **Resolved**.

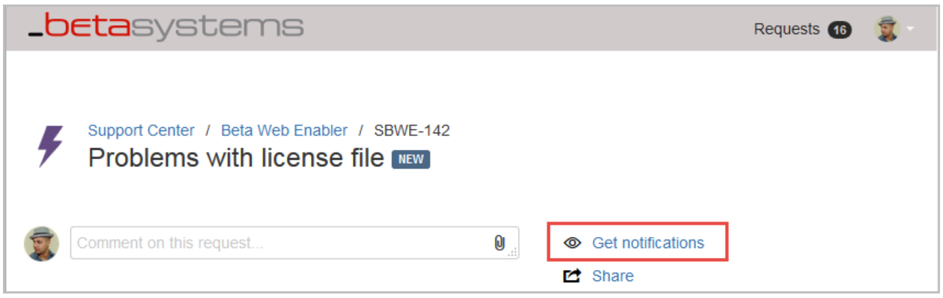
You can activate notifications that have been deactivated at any time.

To activate or deactivate notifications:

1. Open the desired ticket.
2. Do one of the following:
   - Click **Don't notify me** if you don't want to receive an email every time the status of the ticket has changed.



   - Click **Get notifications** if the notifications are already deactivated and you want to activate them again.



Subscribing to monthly reports

Overview

You can subscribe to monthly reports that provide you with an overview of all current tickets submitted by your company. These emailed reports list all tickets that are still open as well as those tickets that have been closed within the evaluation period.

Subscribing to monthly report

To subscribe to monthly report:

1. Inform the support team that you want to subscribe to monthly report.
2. Support team needs the following information:
   - Email address(es)

     Specify the email addresses of the persons to whom this report is to be sent. These persons don't need to be registered for the customer portal.
   - Desired file format

     Specify whether you want to receive the report as Excel or CSV file.

File formats for the report

The reports can be made available as Excel or CSV file.

	A	B	C	D	E	F	G	H
1	Agility Bank - Support Progress Report: March 11, 2016							
2								
3	Product	IssueKey	Priority	CustomerStatus	CustomerTicketNo	Created	Reporter	Summary
4	DCI Beta 92	SB92-172	Priority 1	In Progress	AB-1511-23	13.01.2016	Ken Busch	Fehlerhaftes L
5	DCI Beta 92	SB92-128	Priority 2	In Progress		11.12.2015	Tom Mai	test mit tom m
6	DCI Beta 92	SB92-129	Priority 3	In Progress by Deve		11.12.2015	Ken Busch	test
7	DCI Beta 92 EJM	SEJM-13	Priority 2	In Progress		22.01.2016	Ken Busch	Prio 1 Tests mi
8	IAM SAM	SSAM-20	Priority 2	In Progress	56789	20.01.2016	Ken Busch	Test mit neuer
9	IAM SAM	SSAM-4	unspecified	New		06.01.2016	Ken Busch	Test REIL
10	IAM SAM	SSAM-1	unspecified	New		05.01.2016	Ken Busch	Erster Test

	A	B	C	D	E	F	G	H
1	Agility Bank - Support Progress Report: March 11, 2016							
2								
3	Product	IssueKey	Priority	CustomerStatus	CustomerTicketNo	Created	Reporter	Summary
4	DCI Beta 92	SB92-172	Priority 1	In Progress	AB-1511-23	13.01.2016	Ken Busch	Fehlerhaftes Logformat
5	DCI Beta 92	SB92-128	Priority 2	In Progress		11.12.2015	Tom Mai	test mit tom mai
6	DCI Beta 92	SB92-129	Priority 3	In Progress by D		11.12.2015	Ken Busch	test
7	DCI Beta 92 EJM	SEJM-13	Priority 2	In Progress		22.01.2016	Ken Busch	Prio 1 Tests mit EJM
8	IAM SAM	SSAM-20	Priority 2	In Progress	56789	20.01.2016	Ken Busch	Test mit neuem Propert
9	IAM SAM	SSAM-4	unspecified	New		06.01.2016	Ken Busch	Test REIL
10	IAM SAM	SSAM-1	unspecified	New		05.01.2016	Ken Busch	Erster Test

Table columns

The report displays the following information:

Column	**Meaning**
Product	Name of the affected product
IssueKey	Ticket number
Priority	Priority
Status	Ticket status
Created	Date when the ticket was created.
Reporter	Name of the person who created the ticket.
Summary	Short description of the ticket
CustomerTicketNo	Number assigned to the ticket by customer.

Procedure for service partners or distributors

Registering for the customer portal

If you are a service partner or distributor and provide support to one or more customers, you have to register for the customer portal more than ones.

- A registration for your company, to create your own tickets.
- A registration for each of the customers you provide support to in order to create tickets for the customer.

  We recommend to set up a group mailbox for each of your customers and to specify the email address of the corresponding group mailbox when registering for the customer portal. Otherwise every employee needs an extra registration for the customer portal for each customer for whom the employee wants to create a ticket.

  Note: A customer is not able to create a ticket for a product a service partner or distributor provides support for.

Notifications

If the ticket status changes, only the service partner or distributor is informed. If the customer should also be notified, you have to inform the support team who needs to be informed when a particular ticket status has been reached. For more information on notifications, see "Defining notifications" on page 27.

Example

If you provide, for example, support to two customers (customer A and B) you have to register for the customer portal three times.

- A registration for yourself, in order to create tickets for your company.
- A registration for customer A, in order to create tickets for customer A.
- A registration for customer B, in order to create tickets for customer B.