User Manual for eService Version 8.1

Right To Service (RTS) Enabled

Intergraph's eService Support System

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1 Introduction

This manual was created by Intergraph UK Support to describe the functionality of the eService Support System (thereinafter known as eService). It contains print screens of eService with the description of its correct use and functionality.

This current document applies to version 8.1 of eService with Right To Service (RTS) enabled.

Please note that eService functionality and appearance is subject to change without warning. Intergraph UK will endeavour to keep this user manual up-to-date however users should be aware this document is only valid up until the date indicated.

1.1 Accessing Intergraph's eService

From an internet browser either click directly on the Intergraph eService link or navigate to the Intergraph Global Support or UK Support websites.

Intergraph eService (Click here to log a service request through eService)

Intergraph Global Support Website: http://support.intergraph.com

Intergraph UK Support Website: http://www.intergraph.co.uk/support

On the Intergraph UK SG&I Support website under the section **How to Reach Intergraph UK Support** click the link within this section.

Log a Service Request through eService:

Customers can use eService to view, track and submit new service requests to the Intergraph UK helpdesk. Click here to log a service request through eService. If you do not have a user login, please contact the UK helpdesk to request one or click here.

The latest version of this document can be downloaded from by clicking on -

http://www.intergraph.co.uk/sgi/support.aspx

2 Logging in to eService

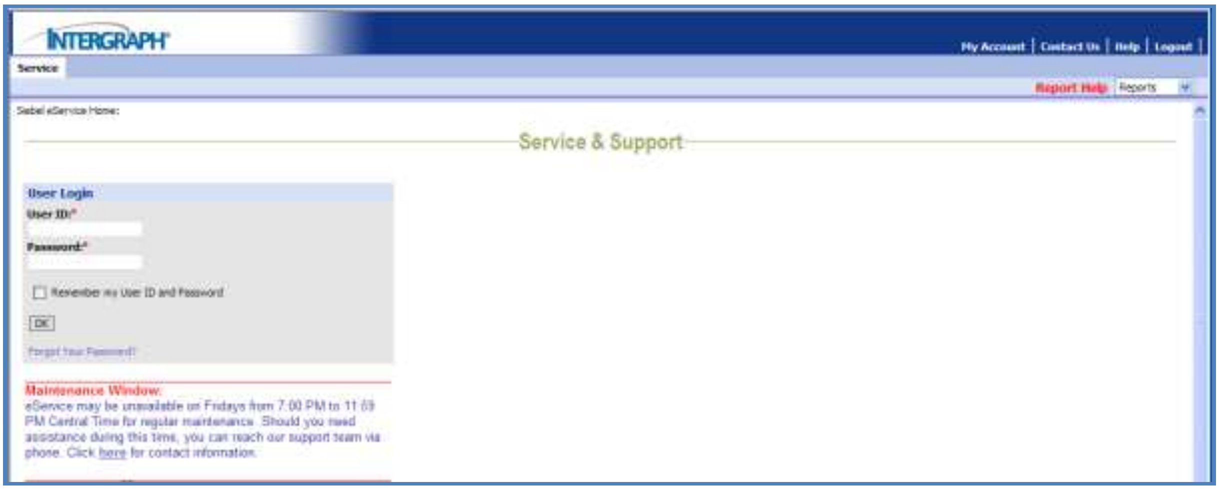


Figure 1: eService Login Page

You will be prompted for your user ID and password. Enter your user ID and password and then click **OK**.

NOTE: If you already have a user ID and password for http://support.intergraph.com to access product support, knowledge base and other online support you can use the same login credentials to access eService.

2.1 Requesting a Customer Login

If you currently do not have a user ID and password **or** have lost your login credentials, please contact the UK support helpdesk (see **Contacting Intergraph Support** section) to reset or create a new account for you. You will need to specify whether you would like access to just the Intergraph support pages, eService or both systems. Alternatively you can use the online form to request a customer login.

2.2 Resetting an Account Password

If you have forgotten your password or would like to reset your account, follow the "**Forgot Your Password?**" link on the eService home page. You will need to know your User ID and email address associated with your eService account.

3 eService Home

After logging in to eService the home page is displayed (Figure 2).

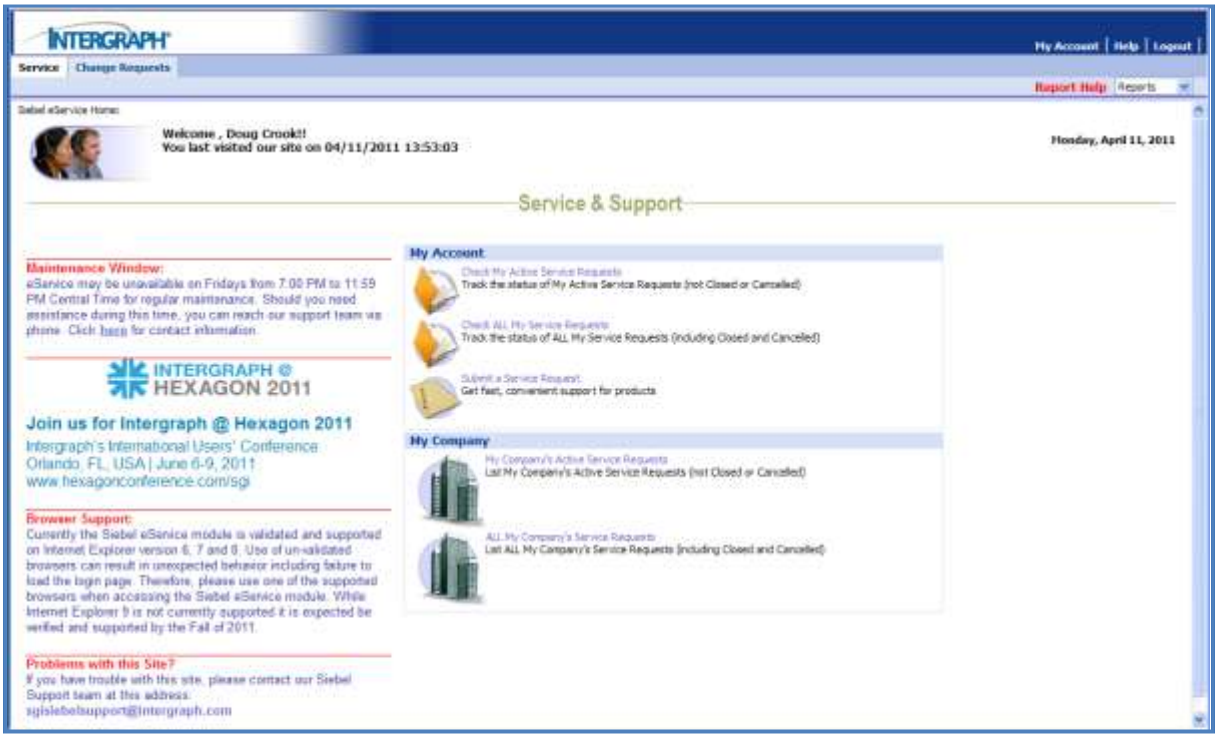


Figure 2: eService Home Page

The eService home page is broken down into several sections which cover:

- Tracking the status of active service requests you have logged
- Tracking the status of all service requests you have logged with Intergraph support
- Review your company or organisation’s active service requests
- Review all of your companies or organisation’s service requests logged with Intergraph support
- Submit a new service request
- Update your contact details (including changing your password)
- Search for CR-Enhancements or CR-Defects that have been generated against Intergraph products as a result of service requests you or your company has raised.

4 Viewing Your Active Service Requests

If you select the option to ‘Check My Active Service Requests’ you will be presented with a list of service requests that are logged against your name that are currently “Open” in our service management system.

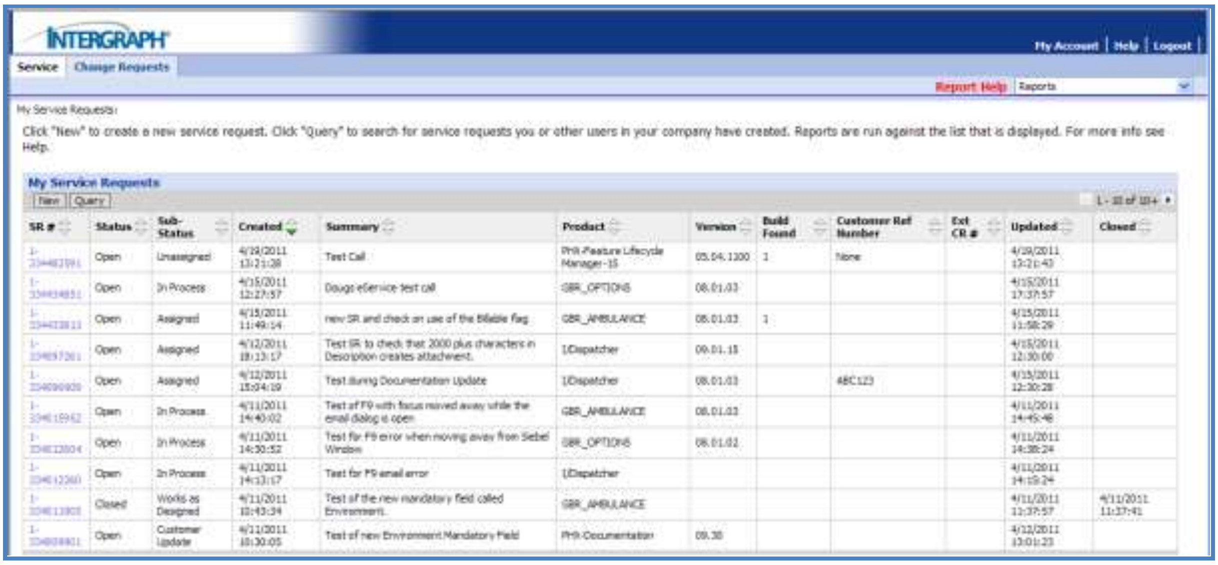


Figure 3: My Active Service Requests View

4.1 Filtering Your Active Service Requests

If you have a large number of service requests currently open in our service management system you can use the ‘Query’ button to filter the list by any of the available fields (Figure 4).

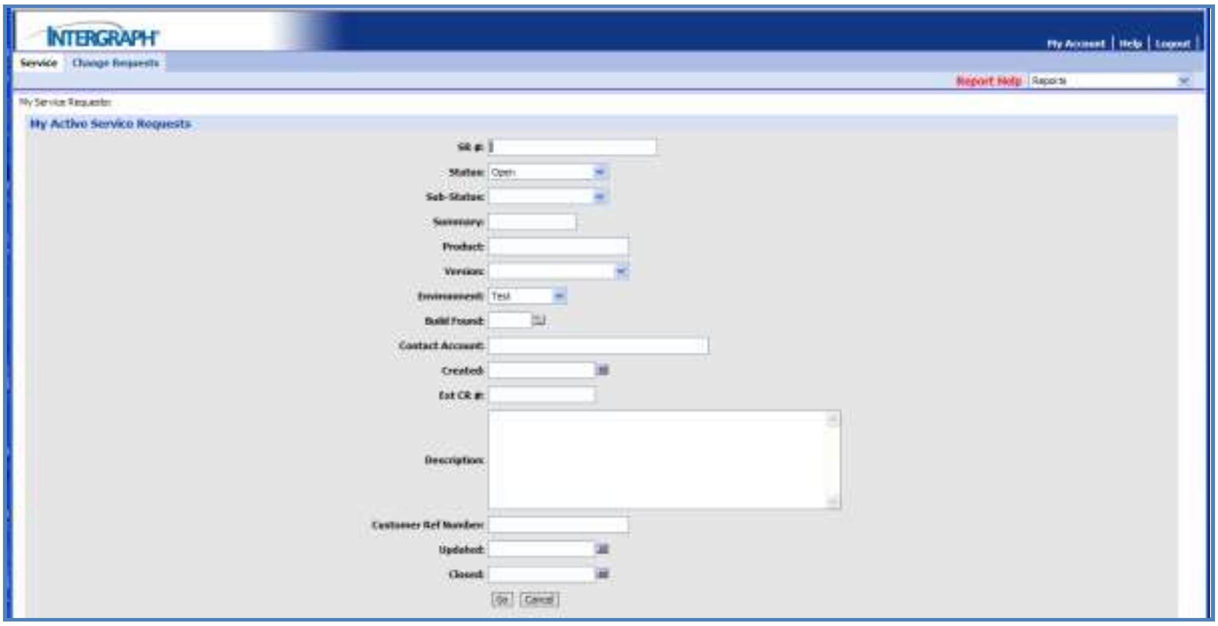


Figure 4: Service Request Query View

You can filter your service requests by Product, Environment or look for service requests which have a particular Sub-Status.

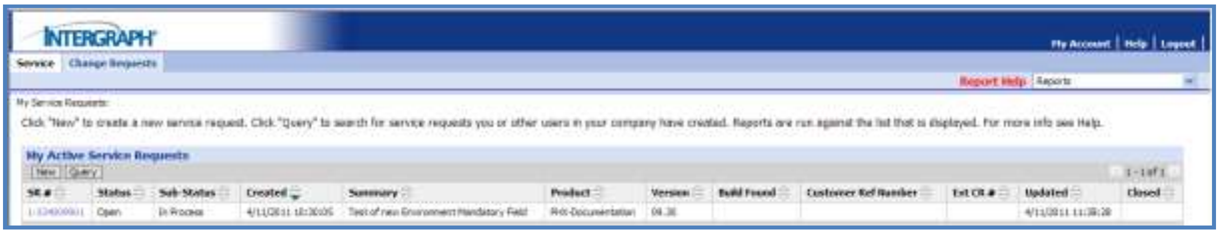


Figure 5: Filtered Service Requests

4.2 Viewing Service Request Details

To view more information about a particular service request click on the service request reference number under the **SR #** column to access more details.

Figure 6: Service Request Detailed View

Note in Figure 7 the Description Field has more than a single line of text and so has a Scroll Bar provided automatically.

Figure 7: Service Request Detail Multi Line View

The service request details page has a number of sections which include:

- **Service Request** – This section contains information about the issue reported and which product it is recorded against. Other information includes:
  - Current Status and Sub-Status of the Service Request
  - Priority of the Service Request
  - Date and time stamps for when the Service Request was Opened and Closed

Figure 8: Service Request Header Section

- **Attachments** – This section allows you to submit files that relate to the issue you are reporting. These may be log files, screenshots of error messages or example datasets.
  - Click the **Add** button to browse for the particular file on your system to upload and (optionally) add a comment for the file to aid our support analysts before selecting **Submit** to upload the file.

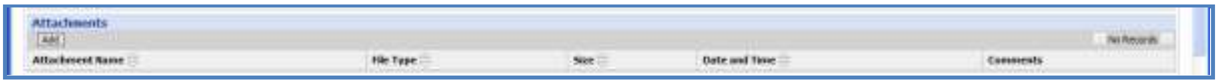


Figure 9: Service Request Attachments

- **Updates -** This section lists all the activities that have occurred in relation to the service request. Service request activities can include:
  - Record / Copy of any communication (phone or email)
  - Copies of email messages generated by the Service Management System
  - Status Changes / Updates
  - Notifications of additional information being added to the service request (product version, CR reference number)

Figure 10: Service Request Updates Section

- **Change Request (CR) -** If the Service Request issue was identified to either be a defect or enhancement to an Intergraph product, the relevant change request report will be generated and related to the Service Request so that the customer can receive updates on the progress of the CR.

Figure 11: Service Request Change Request Section

5 Creating a New Service Request

This can be initiated by

1) Select the **'Submit a Service Request'** from the Service Home Page (Figure 2)
2) Select the **New** button from the Active Service Requests screen (Figure 3)

   Both methods will send a request to the appropriate UK Helpdesk.

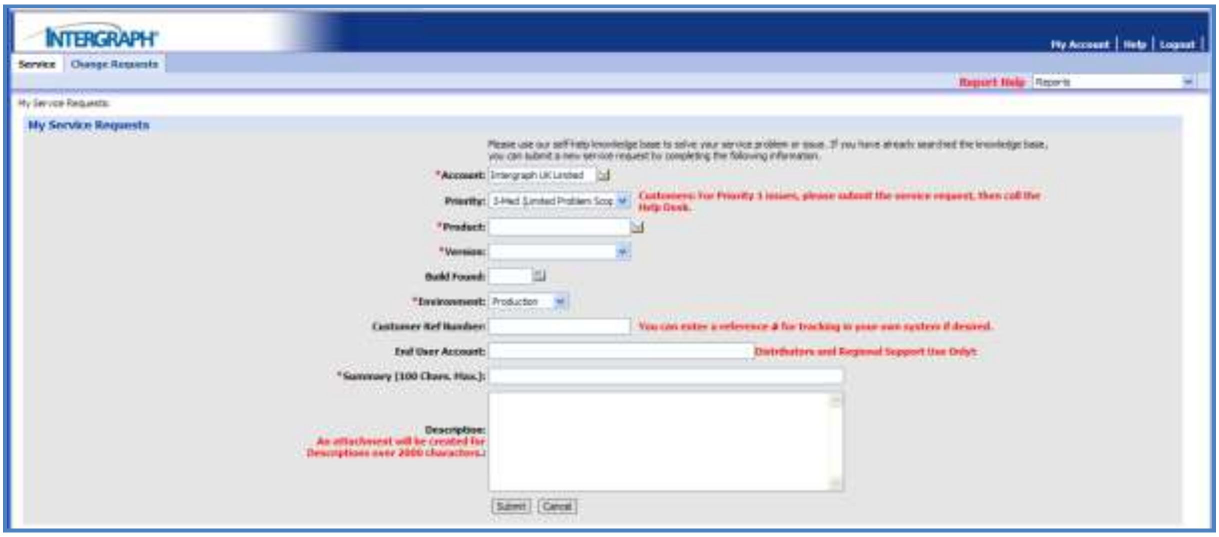


Figure 12: New Service Request View

Complete the various fields and provide as much detail about the nature of the issue as practical remembering that Log Files and Documents describing workflows to reproduce can always be added as Attachments. Screenshots of Error Messages & Dialogs can prove very helpful.

Account (**Required Field**)

The account field will be automatically populated with the relevant software maintenance account you are associated with.

Note: If the account field is blank or you are unable to select any account please contact the UK Support Helpdesk for assistance (see **Contacting Intergraph Support** section).

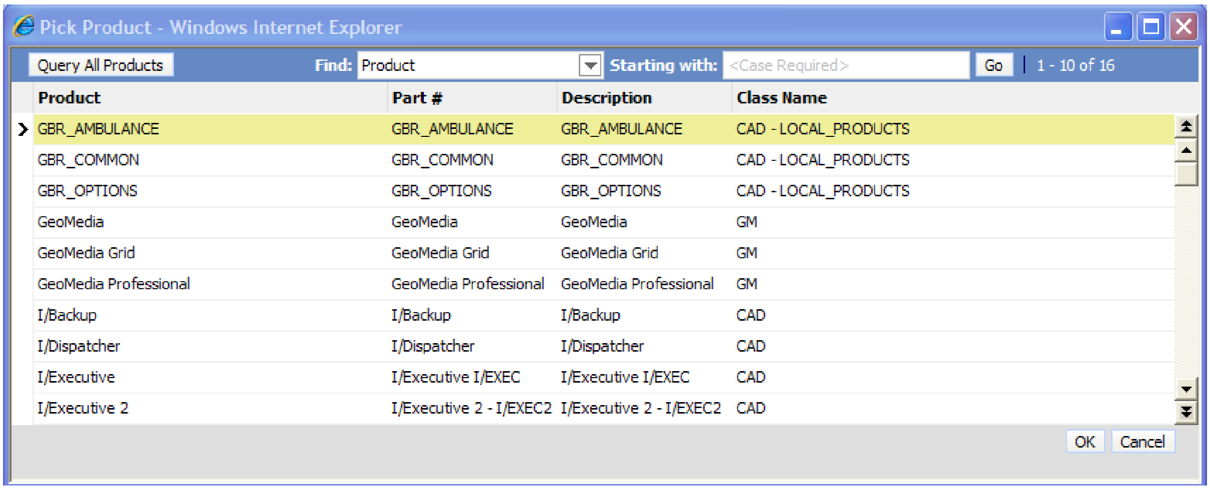
Priority (**Required Field**)

Select the priority of the issue you are reporting. A brief description for each priority is given on the drop down menu. For a priority **1** issue please submit a service request and then call the UK support helpdesk.

Product (**Required Field**)

Select the Go button  to open the Pick Product dialog to browse for the product you want the issue logged against.

The Pick Product dialog will automatically display a list of products that your Organisation has on an Active Maintenance Agreement in an alphanumeric sorted list. This function, known as Right To Service (RTS) will present a much reduced list of Products (Figure 13) to select from.



Product	Part #	Description	Class Name
GBR_AMBULANCE	GBR_AMBULANCE	GBR_AMBULANCE	CAD - LOCAL_PRODUCTS
GBR_COMMON	GBR_COMMON	GBR_COMMON	CAD - LOCAL_PRODUCTS
GBR_OPTIONS	GBR_OPTIONS	GBR_OPTIONS	CAD - LOCAL_PRODUCTS
GeoMedia	GeoMedia	GeoMedia	GM
GeoMedia Grid	GeoMedia Grid	GeoMedia Grid	GM
GeoMedia Professional	GeoMedia Professional	GeoMedia Professional	GM
I/Backup	I/Backup	I/Backup	CAD
I/Dispatcher	I/Dispatcher	I/Dispatcher	CAD
I/Executive	I/Executive I/EXEC	I/Executive I/EXEC	CAD
I/Executive 2	I/Executive 2 - I/EXEC2	I/Executive 2 - I/EXEC2	CAD

Figure 13: eService Pick Product - RTS enabled

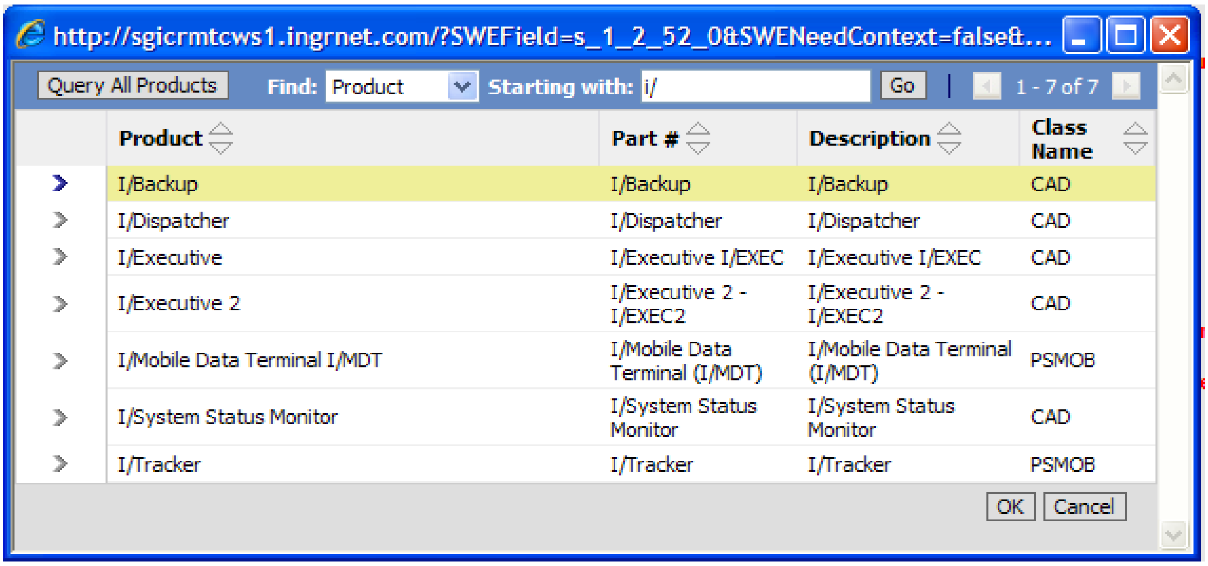
Figure 13 also illustrates this is the first 10 of a possible 16 Products that are available for a Customer to select from when RTS has been enabled.

Use your cursor to position the select arrow **>** in the left hand column next to the appropriate product, then with the correct product highlighted click the **OK** button. Click **Cancel** to exit this window.

Note the direction arrows in the top right hand corner of this dialog that can be used to move through the Product lists a page (10 Records) at a time.

Figure 14: Page Navigation

You can also use part of the Product Name, for example, enter the starting characters of the Product "i/", then tab to activate the query producing a reduced list to choose from (Figure 15). Alternatively if you are familiar with a Product Name then entering it fully will prevent the Pick Product dialog from displaying and automatically populated the Product field.



Product	Part #	Description	Class Name
I/Backup	I/Backup	I/Backup	CAD
I/Dispatcher	I/Dispatcher	I/Dispatcher	CAD
I/Executive	I/Executive I/EXEC	I/Executive I/EXEC	CAD
I/Executive 2	I/Executive 2 - I/EXEC2	I/Executive 2 - I/EXEC2	CAD
I/Mobile Data Terminal I/MDT	I/Mobile Data Terminal (I/MDT)	I/Mobile Data Terminal (I/MDT)	PSMOB
I/System Status Monitor	I/System Status Monitor	I/System Status Monitor	CAD
I/Tracker	I/Tracker	I/Tracker	PSMOB

Figure 15: Filtered Product Pick List

There may be occasions when the Product Name you may know an Application or Function by does not match that in the Pick Product list presented in which case please select a Product name that is related to the overall application and a Support Analyst will update the Product field at a later stage when an assessment has taken place.

Version (**Required Field**) & Build Found

From the drop down list select which particular version of the product you are encountering an issue with. The build of a product is the last two numbers of the product version and can be identified by going to the **Help** menu of the product and selecting **About**. For example if you are running GeoMedia 06.01.04.13 the version is 06.01.04 and the build is 13.

Environment (**Required Field**)

Select from the Drop Down List the System Environment the issue is occurring on. The choices are

Production ***Test*** ***Staging*** ***Development*** ***Training***

Customer Ref Number

You can write your own unique reference for the Service Request in this field.

End User Account

This field is for use by Intergraph Distributors / Partners.

Summary (**Required Field**)

A short summary or title to describe the issue.

Description (**Required Field**)

Write in this field a full description of the issue including a workflow that a support analyst can follow in order for them to replicate the issue you are encountering. Add any other relevant information in this field.

Once all the fields have been completed press submit to commit the new SR into the system

5.1 Submitted Service Request's

Once you have submitted the new service request it will appear under your **Active Service Requests** page with a status of **Open** and a Sub-Status of **Unassigned**. The sub-status will change to **Assigned** when a support analyst has taken ownership of the service request and then to **In-Process** when investigating the issue.

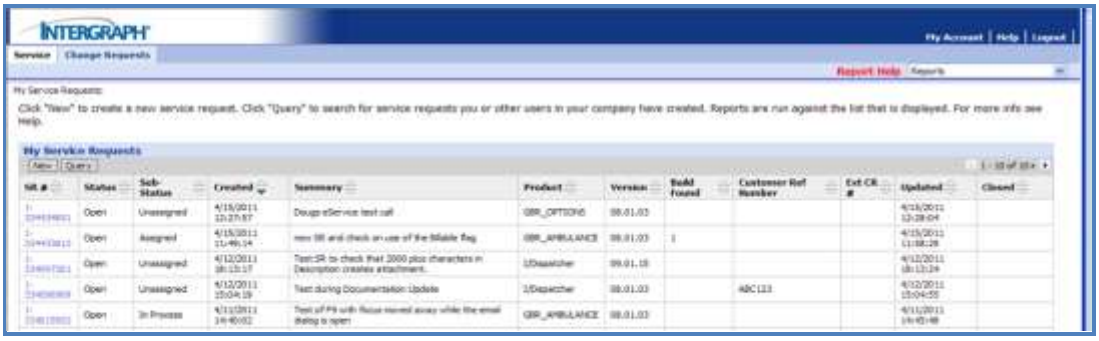


Figure 16: Active Service Requests View

6 Adding an Attachment to an SR

Select the particular SR from your Active SR List and from the detailed view select under the Attachments section the Add button which expands as shown in Figure 17.

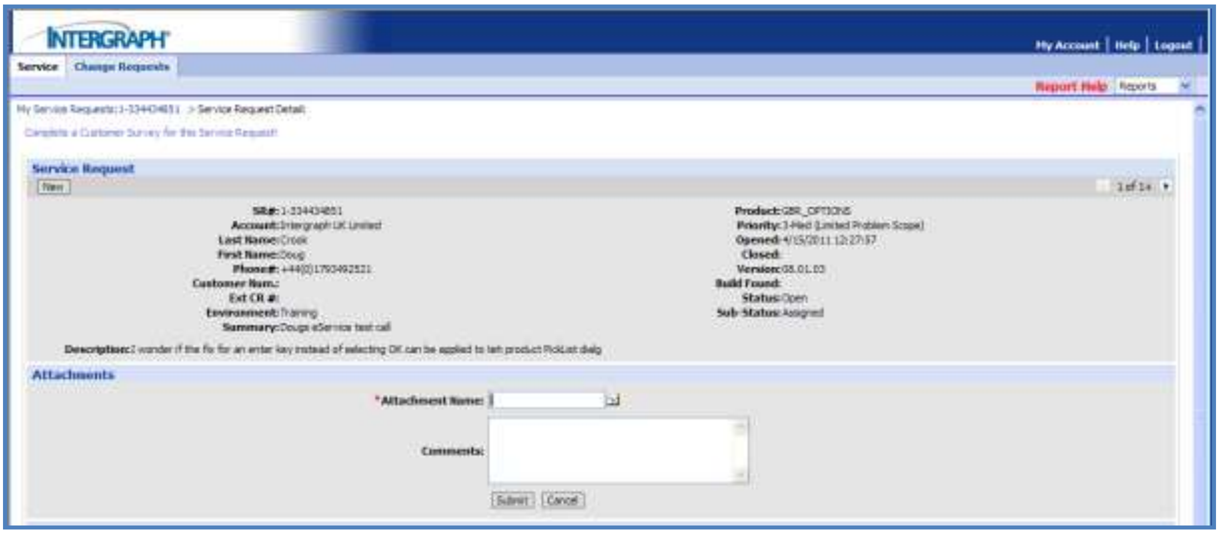
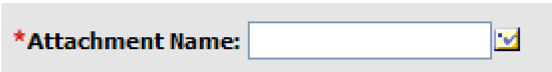


Figure 17: Expanded Attachments Section

Select the Browse Icon 

on the right hand side of this part of the dialog and you will be presented with the Add Attachment Dialog.

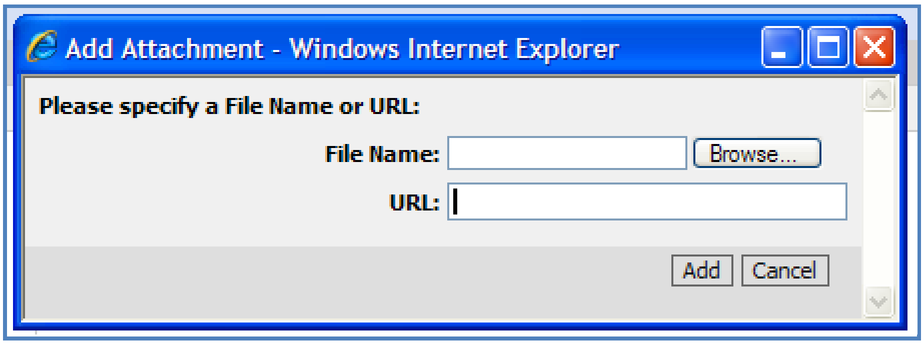


Figure 18: Add Attachment Dialog

Browse and locate the file you wish to attach. This may be a document describing a workflow that is failing, a log file that has been requested by the Support Analyst or a screen shot of an error dialog that has been displayed on a Workstation or Server.

Press Add and you will return to the initial dialog where you can add any appropriate comments and select the Submit button to upload the attachment and update the SR.

This will also result in the SR Sub-Status changing to Customer Update.

7 Viewing Status of Change Requests (Defects or Enhancements)

Customers can access the status of a CR-Defect or CR-Enhancement report that has been created for a service request that has been designated a product defect or enhancement. As described in the section **Viewing Service Request Details** Change Request reports are linked to the service request. To access a list of all Change Requests connected with your organisation select the **Change Requests** tab from the eService home page.

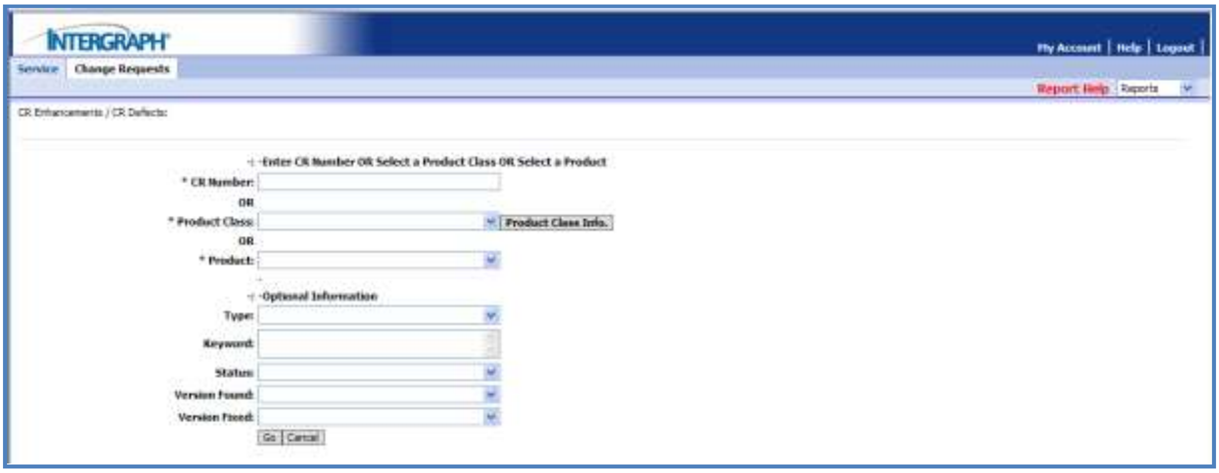


Figure 19: Change Requests Query View

You can search for change requests using a number of criteria. If you have a CR reference number enter it under the **CR Number** field. Alternatively you can search for all Change Requests for a particular product class or product. Use the fields available under **Optional Information** to filter the list of Change Requests further.

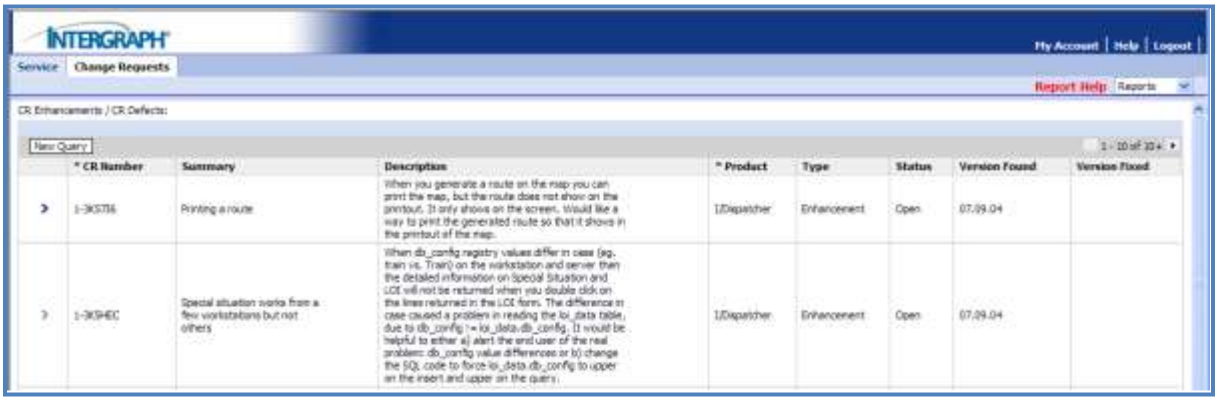


Figure 20: Change Request Query Results

The information available through eService provides the type of the Change Request (defect or enhancement), status, version found and version fixed. Updates to a Change Request report that are linked to Service Requests trigger email updates to be sent to customers to inform them when a CR-Enhancement or CR-Defect has been fixed in a released version of a product.

8 Generating Reports of your Service Requests

eService enables customers to generate reports of their service requests which can be printed or outputted to multiple formats including Adobe PDF, RTF and Microsoft Excel.

Figure 21: Service Requests Reports Menu

From the **Active Service Requests** page select which report you wish to run from the Reports drop down menu located in the upper right hand side of the page (see above image). The types of reports available are:

- **Service Request List**
  - Export the current list of Service Requests into a report which can be printed or saved
- **Service Request List (for Excel)**
  - Export the current list of Service Requests into a report which is formatted for compatibility with Microsoft Excel
- **Service Request Detail**
  - Generates a report based on the current list of Service Requests and includes additional information contained within each Service Request

The Reports will open in new Internet Explorer windows.

The icons along the top allow Download, Print, Report Navigation and Search together with GoTo Page, Zoom and Page Navigation.

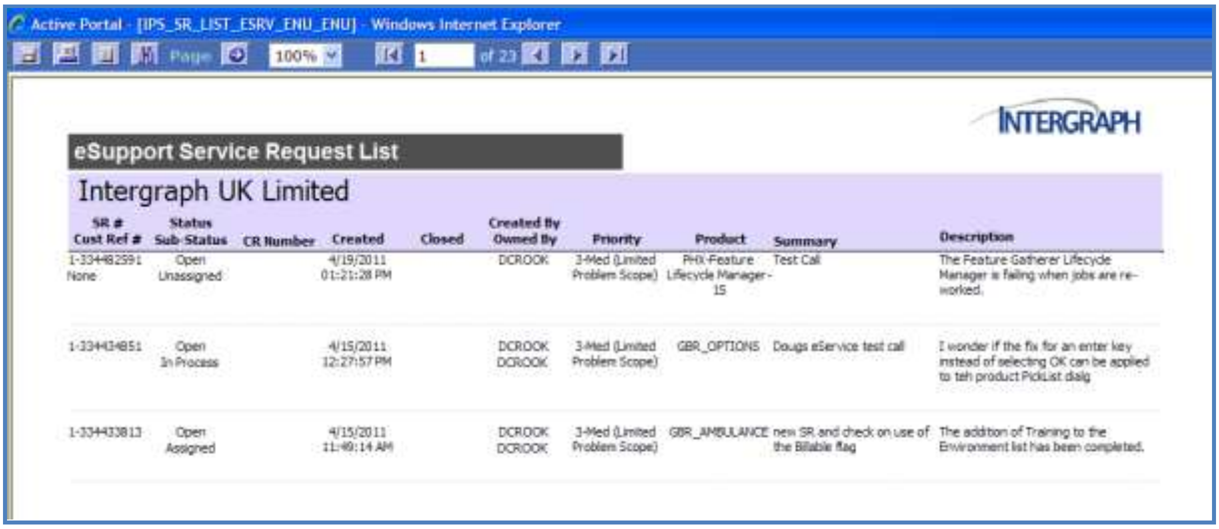
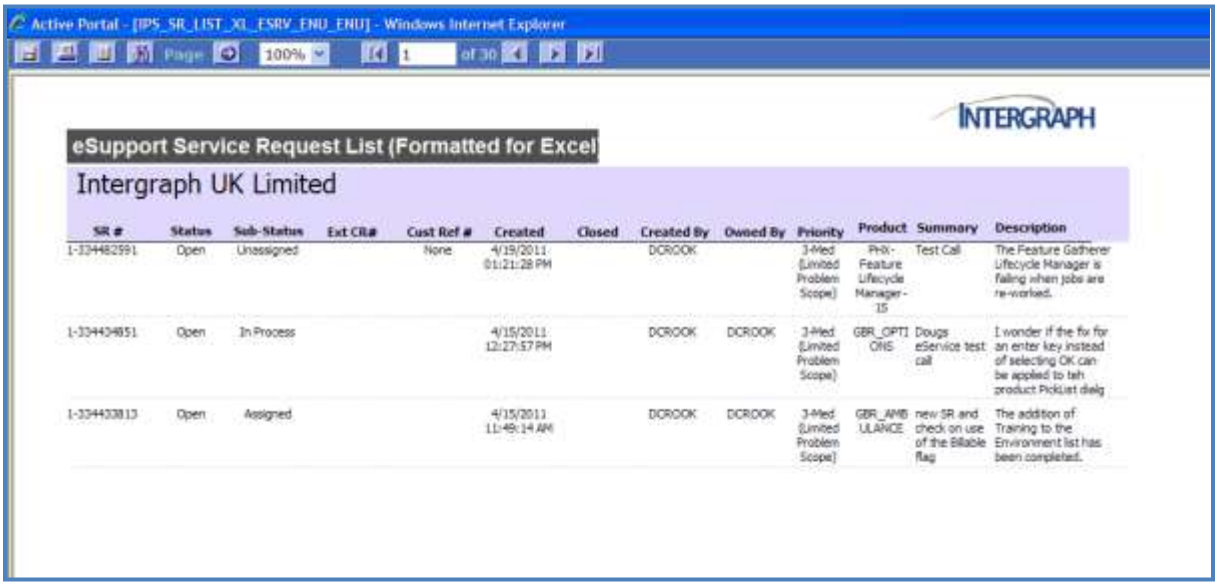


Figure 22: Example eService Request List



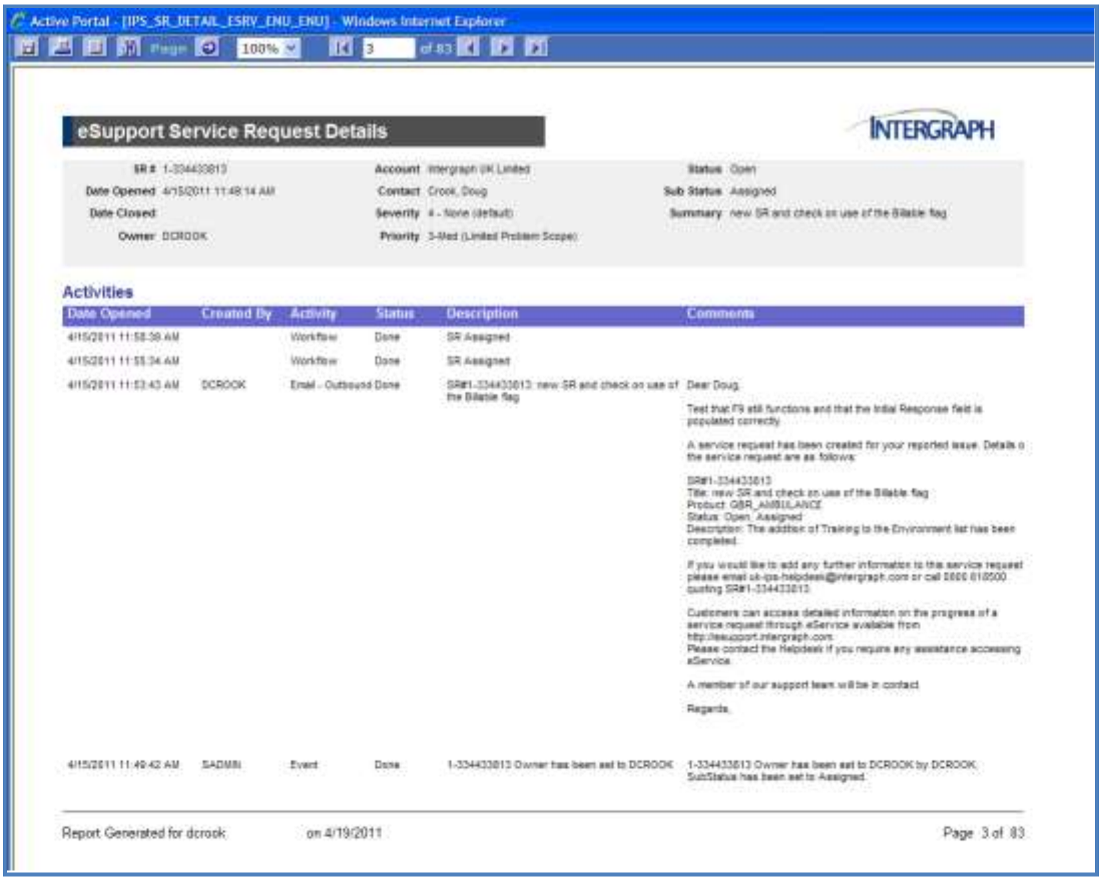
Active Portal - [IPS_SR_LIST_XL_ESRV_ENU_ENU] - Windows Internet Explorer

eSupport Service Request List (Formatted for Excel

Intergraph UK Limited

SR #	Status	Sub-Status	Ext CR#	Cust Ref #	Created	Closed	Created By	Owned By	Priority	Product	Summary	Description
1-334482591	Open	Unassigned		None	4/19/2011 01:21:28 PM		DCROOK		3-Med (Limited Problem Scope)	PHX-Feature Lifecycle Manager-15	Test Call	The Feature Gatherer Lifecycle Manager is failing when jobs are re-worked.
1-334434851	Open	In Process			4/15/2011 12:27:57 PM		DCROOK	DCROOK	3-Med (Limited Problem Scope)	GBR_OPTIONS	Dougs eService test call	I wonder if the fix for an enter key instead of selecting OK can be applied to teh product PickList dialg
1-334433813	Open	Assigned			4/15/2011 11:49:14 AM		DCROOK	DCROOK	3-Med (Limited Problem Scope)	GBR_AMBULANCE	new SR and check on use of the Billable flag	The addition of Training to the Environment list has been completed.

Figure 23: Example eService Request List (Formatted for Excel)



Active Portal - [IPS_SR_DETAIL_ESRV_ENU_ENU] - Windows Internet Explorer

eSupport Service Request Details

SR #	1-334433813	Account	Intergraph UK Limited	Status	Open
Date Opened	4/15/2011 11:48:14 AM	Contact	Crook, Doug	Sub Status	Assigned
Date Closed		Severity	4 - None (default)	Summary	new SR and check on use of the Billable flag
Owner	DCROOK	Priority	3-Med (Limited Problem Scope)		

Activities

Date Opened	Created By	Activity	Status	Description	Comments
4/15/2011 11:58:38 AM		Workflow	Done	SR Assigned	
4/15/2011 11:55:34 AM		Workflow	Done	SR Assigned	
4/15/2011 11:53:43 AM	DCROOK	Email - Outbound	Done	SR#1-334433813: new SR and check on use of the Billable flag	Dear Doug, Test that F9 still functions and that the Initial Response field is populated correctly. A service request has been created for your reported issue. Details o the service request are as follows: SR#1-334433813 Title: new SR and check on use of the Billable flag Product: GBR_AMBULANCE Status: Open, Assigned Description: The addition of Training to the Environment list has been completed. If you would like to add any further information to this service request please email uk-ips-helpdesk@intergraph.com or call 0800 018500 quoting SR#1-334433813 Customers can access detailed information on the progress of a service request through eService available from http://esupport.intergraph.com. Please contact the Helpdesk if you require any assistance accessing eService. A member of our support team will be in contact. Regards,
4/15/2011 11:49:42 AM	SADMIN	Event	Done	1-334433813 Owner has been set to DCROOK	1-334433813 Owner has been set to DCROOK by DCROOK. SubStatus has been set to Assigned.

Report Generated for dcrook on 4/19/2011 Page 3 of 83

Figure 24: Example eService Request Details

9 Service Request Monthly Report

Customers can sign up to an email service that sends monthly service request(s) reports at the beginning of each month. Two types of reports are available through this service:

- **My Active Service Requests**
  - Available as a Summary List (in Adobe PDF or Microsoft Excel formats) or a Detailed Report (only available in Adobe PDF format)
  - The report lists all service requests currently Active (Not Closed or Cancelled) logged by you.
- **My Company's Active Service Requests**
  - Available as a Summary List (in Adobe PDF or Microsoft Excel formats) or a Detailed Report (only available in Adobe PDF format)
  - The report lists all service requests currently Active (Not Closed or Cancelled) logged by all contacts from the same company/organisation.

The reports are sent directly to the email address associated with your support account profile. Please refer to section Managing Your Account on how to edit your profile.

The service request monthly report email service can be signed up to via the global support website:

http://support.intergraph.com/RequestForSRReport.asp

This will prompt you to log in with your User ID & Password to the Intergraph Support site and then present the Service Request (SR) Monthly Report dialog.

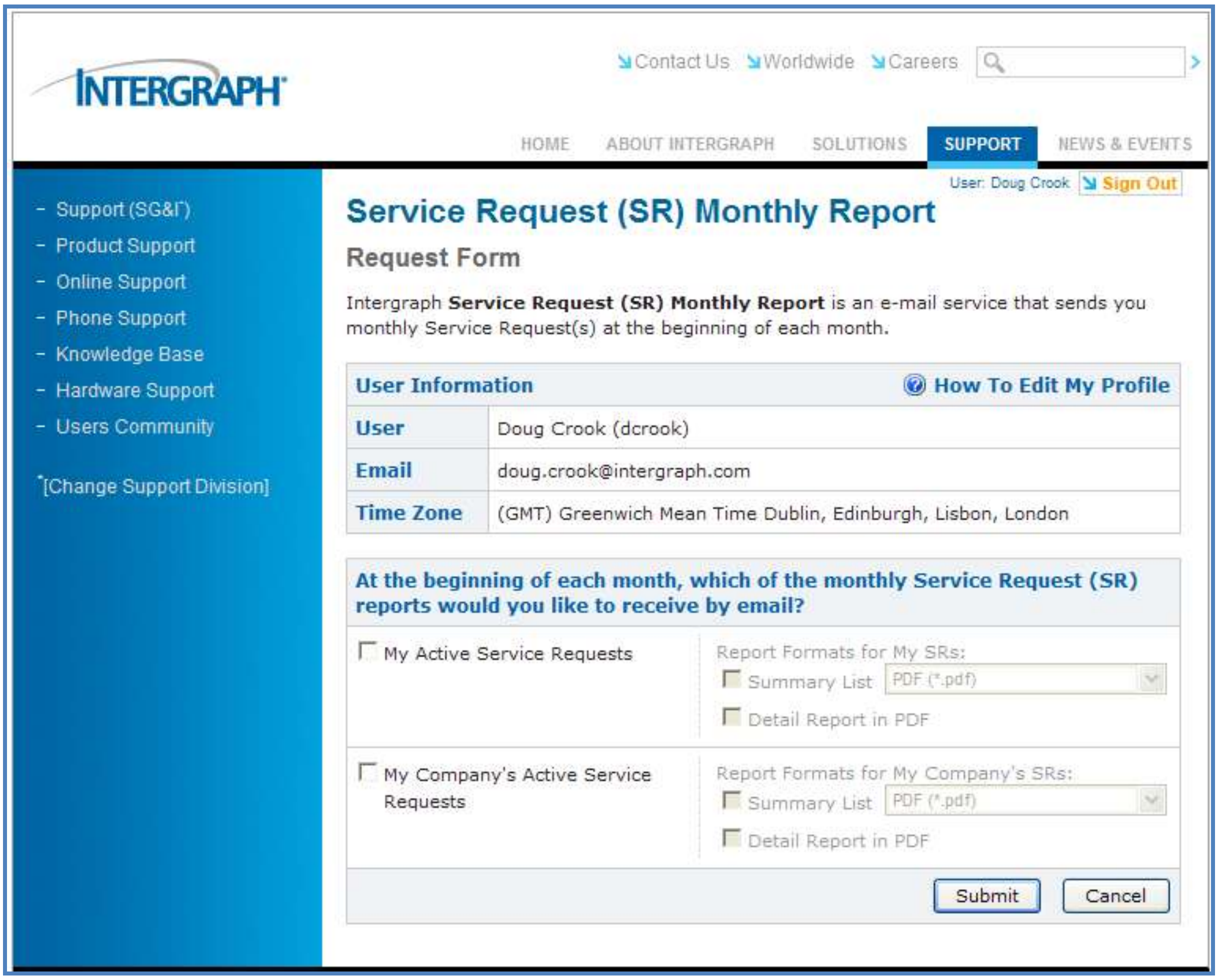


Figure 25: Service Request Monthly Report

Select between the choice of Reports, the level of detail and from the drop down menu, the output format required.

10 Managing your Account

On the eService home page select **My Account** located in the top right section of the page. Under the **My Account** page select **User Profile**.

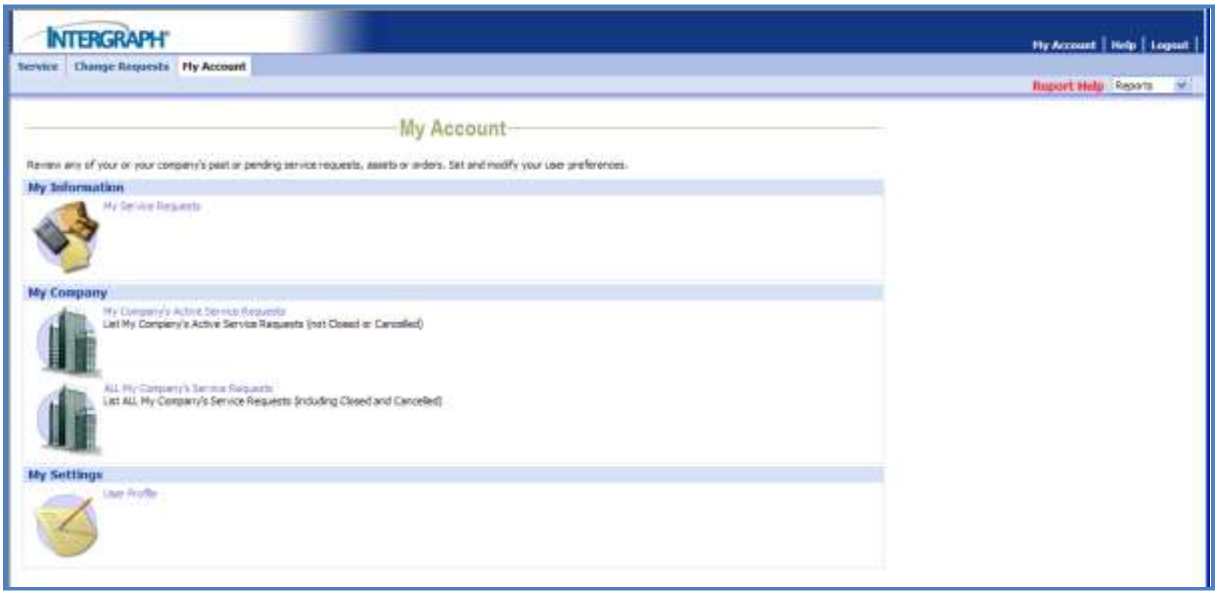


Figure 26: Managing your Support Account

The user profile page lists your contact details and can be amended or updated using the edit button.

10.1 Changing your Password

Customers can change their password under the **User Profile** section of the **My Account** page.

11 Contacting Intergraph Support

The Intergraph UK support helpdesk business hours are Monday - Friday 09:00 – 17:00 (excluding Bank Holidays).

Phone: +44 (0)800 618500

Email: uk-support@intergraph.com

Email: uk-ips-helpdesk@intergraph.com for Public Safety I/CAD customers

Online: http://support.intergraph.com or http://www.intergraph.co.uk/support

eService: https://esupport.intergraph.com/

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