



Astec IT Solutions Ltd.

Venture Point

Towers Business Park

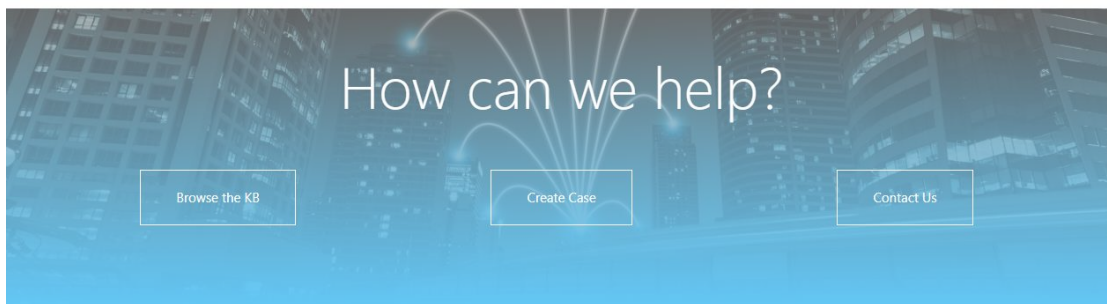
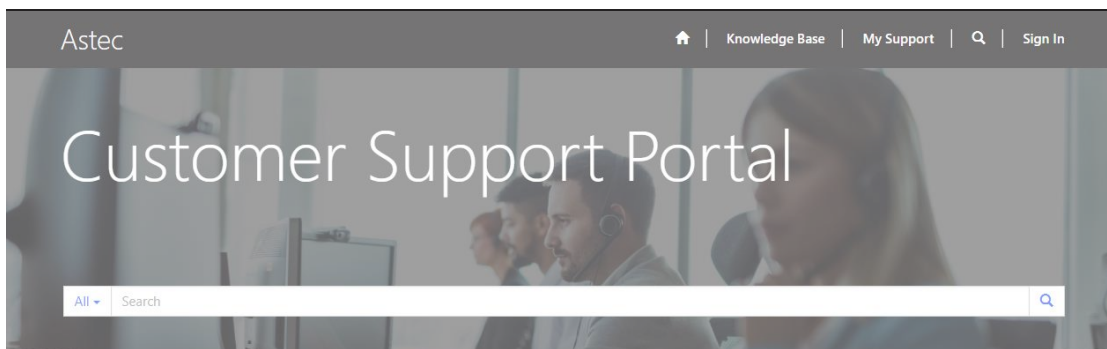
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# ASTECCUSTOMER SUPPORT PORTAL USER GUIDE





**Change Control**

<b>Date</b>	<b>Version</b>	<b>Author</b>	<b>Description</b>	<b>Updated sections</b>
06-Jun-2018	0.1	Chris Smialowski	Draft Version	NA
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## Table of Contents

<b>1</b>	<b>Redeeming a Portal Invitation .....</b>	<b>4</b>
<b>2</b>	<b>Logging Into the Portal .....</b>	<b>6</b>
<b>3</b>	<b>Creating Cases .....</b>	<b>9</b>
<b>4</b>	<b>Checking and Updating Existing Cases.....</b>	<b>13</b>



## 1 REDEEMING A PORTAL INVITATION

Once your customer account has gone live within the Astec Customer Support Portal, you will receive an email invitation.

From: **Astec Customer Support**  
Subject: **Invitation to Astec Customer Portal**

Within the body of this email will be a hyperlink, which should take you directly to a page to redeem the invitation. Please click on this link to navigate to the “**Redeem Invitation**” page.

The email address field should already be populated. Please enter a **username** of your choosing, along with a **password**. Click on the “**Register**” button to create your account.



After registration, you will then be presented with your profile page, which will allow you to update your personal information. Make any changes you feel necessary, and then click on **“Update”** at the bottom of the page.

**Please note**, in order for the Support Portal to **send emails to you**, you will need to leave the **“Email”** checkbox ticked under the **“How may we contact you?”** section.

Astec

Home > Profile

## Profile

Please provide some information about yourself.

The **First Name** and **Last Name** you provide will be displayed alongside any comments, forum posts, or ideas you make on the site.

The **Email Address** and **Phone** number are required but will not be displayed on the site.

Your **Organization** is required, and a **Title** is optional. They will be displayed with your comments and forum posts.

### Your Information

<b>First Name *</b> NAME	<b>Last Name *</b> NAME
<b>E-mail</b> EMAIL	<b>Business Phone</b> #####
<b>Organization Name</b> COMPANY	<b>Title</b>
<b>Nickname</b>	<b>Web Site</b>

**Public Profile Copy**

Preferred Language

How may we contact you? Select all that apply.

Email **Email checkbox will need to remain checked in order to receive automatic email alerts from the system.**

Fax

Phone

Mail

**Update**

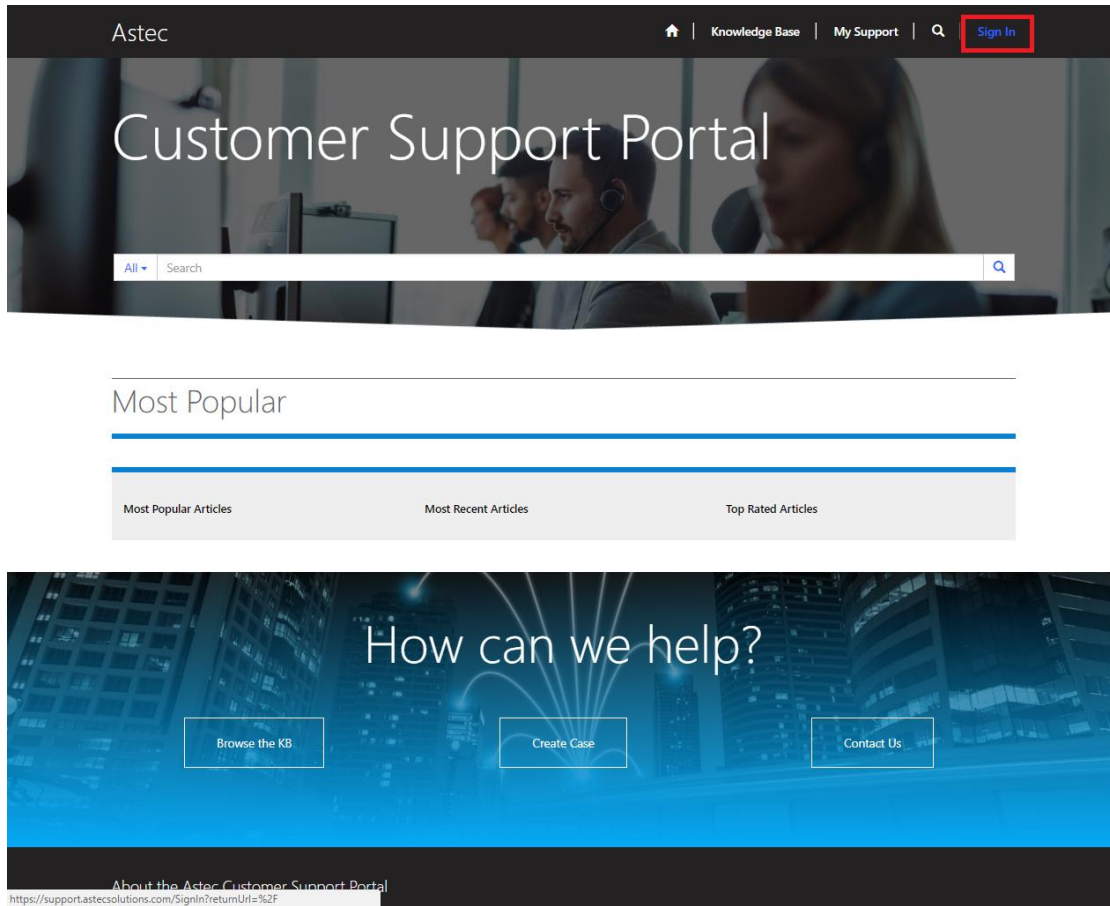
## How can we help?

[Browse the KB](#) [Create Case](#) [Contact Us](#)



## 2 LOGGING INTO THE PORTAL

The Astec Customer Support Portal is accessible online. To access this, please use the following link: <https://support.astecsolutions.com>

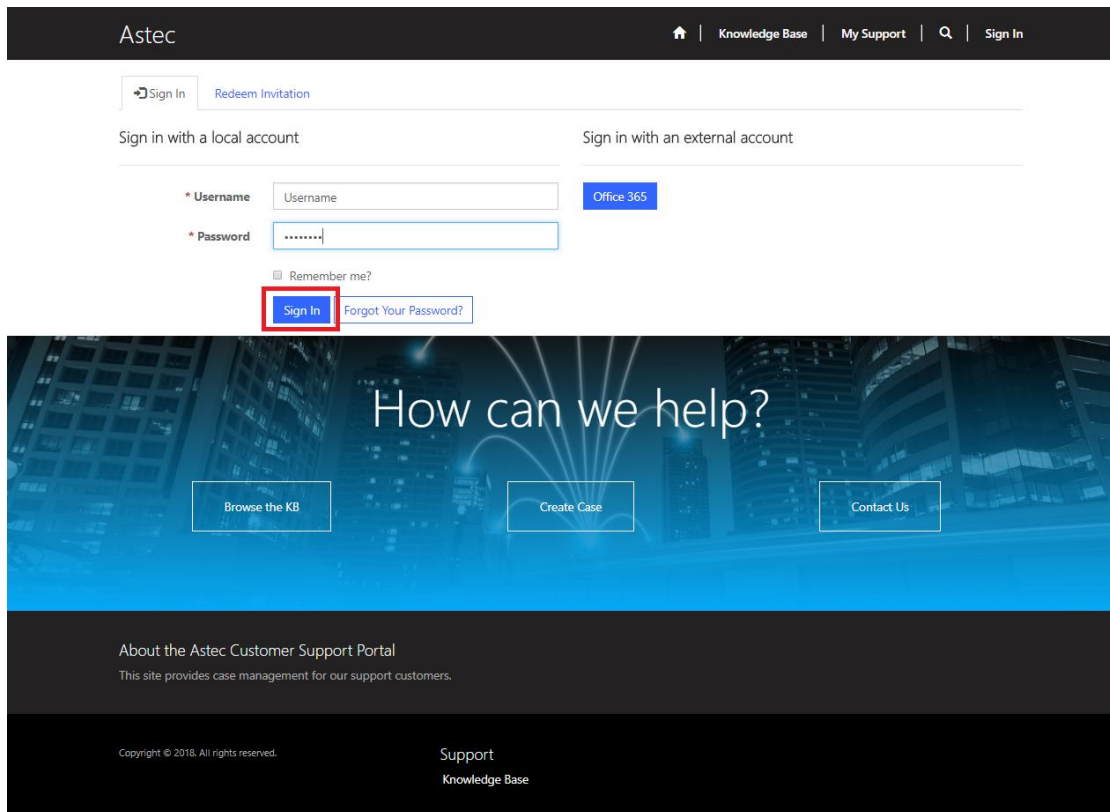


*If you have just created an account for the first time and **are already logged in**, please click on your username in the top right corner, followed by clicking on “Sign Out” to test your login details.*

The link at the top of this page will open the Astec Customer Support Portal **home page**. You will need to login in order to use the portal. Click on “**Sign In**” on the **top right of the page**.



This will open the **login page**. Please enter the username and password you created in section one of this guide.



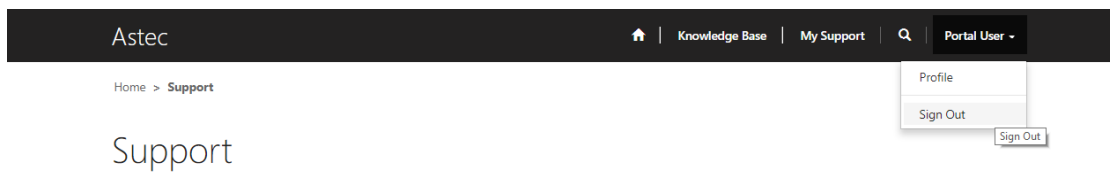
Click on the **“Sign In”** button in the centre of the page. This should return you to the Home Page as a logged in user. **Your username should now appear in the top right** of the menu bar.



The **Menu bar** below allows you to quickly navigate to different areas within the portal.



- The **“home”** icon will return you to the main home page.
- **“Knowledge Base”** opens the Knowledge Base home page. Knowledge articles will be added to this section.
- **“My Support”** opens the support page. This page displays any existing support cases, as well as allowing you to raise new ones.
- **Your username.** You can access the page to **update your profile** by clicking on your username, and then clicking **“Profile”**.
- **“Sign Out”** is also accessible by clicking on your username. Choose **“Sign Out”** from the drop down menu.

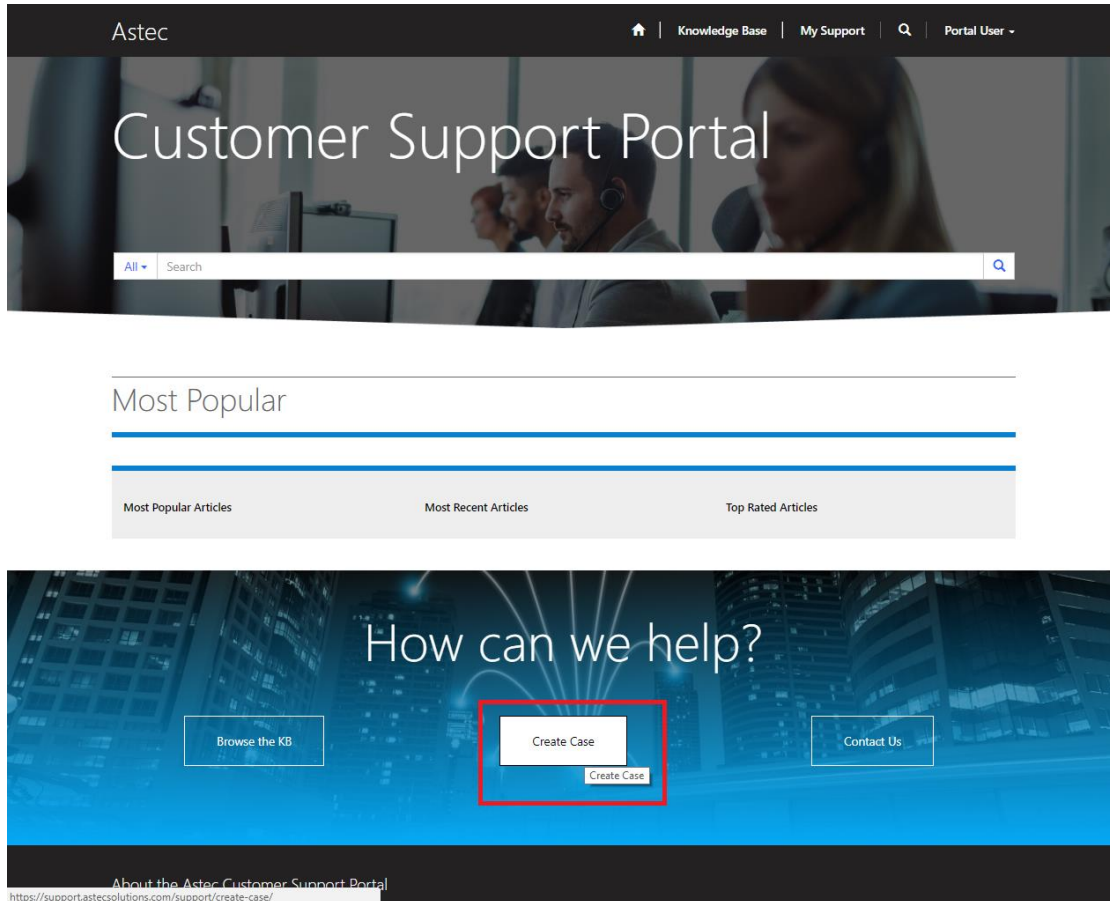




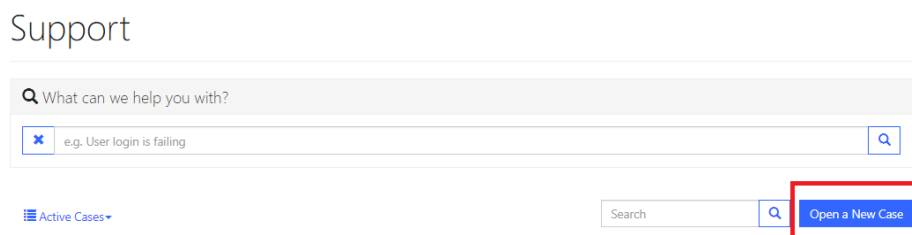


### 3 CREATING CASES

There are two ways to create a case within the portal. There is a “**Create Case**” button at the bottom of the “Home” page.



If you navigate to the “**My Support**” page, you can also create a case by clicking on the “**Open a New Case**” button, located on the right of the page.





Once you have clicked on a link to create a case, you will be presented with the **Open a New Case** page.

The screenshot shows the 'Open a New Case' page. At the top, there is a navigation bar with 'Astec' and links for 'Knowledge Base', 'My Support', and 'Portal User'. Below the navigation bar, the breadcrumb trail reads 'Home > Support > Open a New Case'. The main heading is 'Open a New Case'. The form contains several fields: 'Title \*' (with a red box around it), 'Customer Case Reference', 'Case Type \*' (with a red box around it), 'Priority \*' (with a red box around it), 'Product', 'Customer \*', 'Contact \*', and 'End User'. There is also a 'Suggested Topics' section with a link to 'Knowledge Base - Home'. The 'Description' field is a large text area with a red box around it.

**Please fill out the below fields:**

<b>Title:</b>	Give your case a descriptive title. This will make identifying the case easier in the future.
<b>Case Type:</b>	This is a drop down field. The types available are "Issue", "Change Request", "Root Cause Analysis", and "Information Request".
<b>Priority:</b>	This is a drop down field. Please choose a priority that matches the urgency of your issue.
<b>Description:</b>	Please enter as much useful information as possible to help us progress the case quickly.



You can also **attach files**, for example any reports or **screenshots**, that may help with the investigation. To do this, there is an **“Attach a File”** section.

Product

Description

Give a thorough description here. Please provide as much information as possible that will help us proceed with the investigation.

Attach a File

Choose Files No file chosen

Submit Cancel

Click on **“Choose Files”**, then select any files you would like to upload to the case, followed by clicking the **“open”** button.

Product

Description

Give a thorough description here. Please provide as much information as possible that will help us proceed with the investigation.

Attach a File

Choose Files No file chosen

Submit Cancel

Open

File name: My File to Upload.png

Open Cancel

Once you have completed the required fields, click on the **“Submit”** button at the bottom of the page.



This should return you to the “**My Support**” homepage, and your newly created case should appear under “**My Open Cases**”. An email will be sent to you with an overview of the case details.

The screenshot shows the Astec Support portal interface. At the top, there is a navigation bar with the Astec logo, a home icon, and links for Knowledge Base, My Support, and Portal User. Below the navigation bar, the breadcrumb path is Home > Support. The main heading is 'Support'. A search bar is present with the text 'What can we help you with?' and a search icon. Below the search bar, there is a dropdown menu with the text 'e.g. User login is failing'. A table of open cases is displayed, with the first row highlighted in red. The table has columns for Case Number, Case Title, Case Type, Status Reason, and Created On. Below the table, there is a section titled 'How can we help?' with three buttons: 'Browse the KB', 'Create Case', and 'Contact Us'. At the bottom, there is a footer with the text 'About the Astec Customer Support Portal' and 'This site provides case management for our support customers.' The footer also includes the copyright notice 'Copyright © 2018. All rights reserved.' and the text 'Support Knowledge Base'.

Case Number	Case Title	Case Type	Status Reason	Created On
CAS-01036-Q1T7W1	Title to briefly describe the Issue	Issue	New	06/07/2018 15:02



## 4 CHECKING AND UPDATING EXISTING CASES

You can review and update any existing open cases on the “**My Support**” page. Cases shown by default will be **open cases** only. You can change the **filter** to show **all cases, closed cases,** or all **Open Cases**.

To do this, click on the **currently applied filter**, then choose the new filter you would like applied.

The screenshot shows the Astec My Support page. At the top, there is a navigation bar with 'Astec' on the left and 'Home | Knowledge Base | My Support | Portal User' on the right. Below the navigation bar, the breadcrumb 'Home > Support' is visible. The main heading is 'Support'. A search bar contains the text 'e.g. User login is failing'. Below the search bar, there is a filter dropdown menu with the following options: 'My Open Cases', 'My Closed Cases', 'All My Cases', and 'Active Cases'. The 'My Open Cases' option is currently selected and highlighted with a red box. To the right of the filter dropdown, there is a search input field and a blue button labeled 'Open a New Case'. Below the filter dropdown, a table of cases is displayed with columns: Case Title, Case Type, Status Reason, and Created On. The table contains two rows of data.

Case Title	Case Type	Status Reason	Created On
Another Open Ticket	Issue	In Progress	06/07/2018 15:07
Title to briefly describe the Issue	Issue	Acknowledged	06/07/2018 15:02

This screenshot shows the same Astec My Support page as the previous one, but with the filter dropdown set to 'All My Cases'. A tooltip is visible over the search bar with the text: 'To search on partial text, use the asterisk (\*) wildcard character.' The table of cases now includes a third row, which is highlighted with a red border. This row represents a closed case.

Case Number	Case Title	Case Type	Status Reason	Created On
CAS-01038-R2D2Y8	Another Open Ticket	Issue	In Progress	06/07/2018 15:07
CAS-01037-G3Y3F4	A closed case	Issue	Resolved	06/07/2018 15:06
CAS-01036-Q1T7W1	Title to briefly describe the Issue	Issue	Acknowledged	06/07/2018 15:02

Clicking on a **case number** will open that particular case to review and update:



Home > Support > CAS-01036-Q1T7W1

## Title to briefly describe the Issue

Issue **Active - Acknowledged**

**Case Number**

CAS-01036-Q1T7W1

**Customer \***

Portal Customer

**Title \***

Title to briefly describe the Issue

**Contact**

Portal User

**Customer Case Reference**

**End User**

**Case Type \***

Issue

**Created On**

06/07/2018 15:02

**Priority \***

Level 3/Minor

**Last Updated**

09/07/2018 10:38

**Product**

**Description**

Give a thorough description here. Please provide as much information as possible that will help us proceed with the investigation.

**Timeline**

[Add Comment](#)



3 days ago

Modified on 06/07/2018 15:48

Chris Smialowski → Portal User  
Support Desk Response

Astec will add a response on the portal here. Please review the information provided and add further information where necessary.

Created by Chris Smialowski



3 days ago

Incoming Customer Support → Support Cases (No Support Contract)

**Case Created - CAS-01036-Q1T7W1 CRM:0001017**

Hello,

You are receiving this email because a new case (CAS-01036-Q1T7W1) has been raised. This case's details are:

**Customer:** Portal Customer  
**Customer Contact:** Portal User  
**Title:** Title to briefly describe the Issue  
**Priority:** Level 3/Minor  
**Status:** New

This case has several agreed Key Performance Objectives, which need to be met in order to meet our Service Level Agreement for Portal Customer. These objectives are:

**Case Acknowledgement:**

**First Response:**

**Fix:**

**Resolve:**

To meet the **Case Acknowledgement** Key Performance Objective, simply acknowledge the case. This will not assign the case to you, but it will inform the customer that we have looked at it.

To meet the **First Response** Key Performance Objective, please respond to the case if you are in a position to do so. This will assign it to you and send an email to you and the customer.

Thank you,  
Astec Solutions



3 days ago

Incoming Customer Support → Support Cases (No Support Contract)

**Case Created - CAS-01036-Q1T7W1 CRM:0001017**



The **Timeline** section of the case **displays communication** between yourself and the Astec Support desk.

**Timeline** Add Comment

3 days ago  
Modified on 06/07/2018 15:48

Chris Smialowski → Portal User  
Support Desk Response

Astec will add a response on the portal here. Please review the information provided and add further information where necessary.

Created by Chris Smialowski

3 days ago

Incoming Customer Support → Support Cases (No Support Contract)

**Case Created - CAS-01036-Q1T7W1 CRM:0001017**

You can provide the Astec Support Desk with further information, along with any relevant attachments, by clicking on the **“Add Comment”** button at the top of the **Timeline**.

**Timeline** Add Comment

3 days ago  
Modified on 06/07/2018 15:48

Chris Smialowski → Portal User  
Support Desk Response

Astec will add a response on the portal here. Please review the information provided and add further information where necessary.

The **“Add a Comment”** pop up window will be displayed. Add in any necessary comments and/or attachments, then click on **“Submit”** to update the **Timeline**.

Astec

Home > Support > CAS-01038-R2D

Another Open

Issue Active - In Progress

Case Number  
CAS-01038-R2D2Y8

Title \*  
Another Open Ticket

Add a Comment


\* Comment  
Customer response to the Astec Support Desk should be entered here.  
Further files and/or screenshots can be added by using the "Choose File" button below.

Attach a File  No file chosen




Timeline

Add Comment

 about a minute ago

Portal User → SYSTEM  
Customer response to the Astec Support Desk should be entered here.  
Further files and/or screenshots can be added by using the "Choose File" button below.  
Created by SYSTEM

 27 minutes ago  
Modified on 06/07/2018 15:33

Chris Smialowski → Portal User  
Support Desk response...  
Created by Chris Smialowski

 about an hour ago

Incoming Customer Support → Support Cases (No Support Contract)  
**Case Created - CAS-01038-R2D2Y8 CRM:0001019**

You can also **send a case update via email**. Once work has commenced on your case, you should receive an automated email to inform you work has begun. **Replying to an email** message sent from the **Astec Support** Portal will automatically attach your email to the case.





You can check the statuses of support cases on the “My Support” page. See the “Status Reason” column below:

Astec Home | Knowledge Base | My Support | Search | Portal User

Home > Support

## Support

What can we help you with?

My Open Cases Search | Open a New Case

Case Number	Case Title	Case Type	Status Reason	Created On
CAS-01043-H2Q1C7	A Resolved Case	Issue	Fixed	09/07/2018 13:51
CAS-01042-N6M9B0	Case On-Hold (until specified time)	Issue	On Hold	09/07/2018 13:50
CAS-01041-M5W7R3	Case Requires further Customer Input	Issue	Waiting for Details	09/07/2018 13:50
CAS-01040-N1M4R2	SCADA not responding - All client nodes	Issue	In Progress	09/07/2018 11:55
CAS-01038-R2D2Y8	Another Open Ticket	Issue	Acknowledged	06/07/2018 15:07
CAS-01036-Q1T7W1	Title to briefly describe the Issue	Issue	New	06/07/2018 15:02

Status Reason	Description
<b>New</b>	A newly created case. The Astec Support Desk have yet to take any action on the case.
<b>Acknowledged</b>	The Support Desk have viewed the case and acknowledge this by setting this status.
<b>In Progress</b>	The Support Desk have reviewed the case and begin taking necessary actions.
<b>Waiting For Details</b>	The Support Desk require further information from the customer in order to proceed with the case. An email will notify the customer that additional information is required in order to proceed with the case.
<b>On Hold</b>	It is not currently possible to proceed with the case. The case will be put on hold until an agreed time where it is possible to progress the case.
<b>Resolved</b>	A completed case, or a case which no longer requires further action.