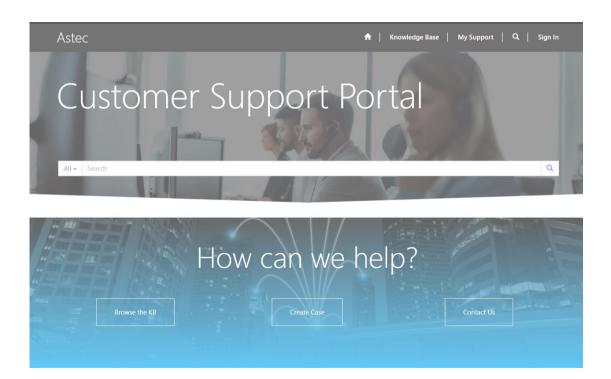


Astec IT Solutions Ltd. Venture Point Towers Business Park Wheelhouse Road Rugeley Staffordshire WS15 1UZ

# ASTEC CUSTOMER SUPPORT PORTAL USER GUIDE





#### **Change Control**

Date	Version	Author	Description	Updated sections
06-Jun-2018	0.1	Chris Smialowski	Draft Version	NA
10-Jul-2018	0.2	Chris Smialowski	Draft Changes	NA
14-Aug-2018	1.0	Chris Smialowski	Initial Release	Section 2



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#### **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.

Astec		<b>+</b>	Knowledge Base	My Support   Q	Sign In
Sign In Redeem I	nvitation				
Redeeming code: LbhrEi) CYFehdn19KTGo1havry	(U2jRi86gkEabQcMRgc4dDg-Y7hl2hVNQ6k-M 8hRy1WG5LZfgf	la 5 ck Mz 1 - Ylu H 6 qC l 8 V 8 H sjql sw D	6lzkGC7hmcxl9nr-zL72	ZxgTggK6QAyNR	
Register for a new	local account	Register using a	an external acco	unt	
* Email	Your@Email-Address.com	Office 365			
* Username	Pick a Username				
* Password					
* Confirm Password					
	Register				
Browse		an we he	elp?	Contact Us	
About the Astec Custo This site provides case mana	omer Support Portal agement for our support customers.				

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.

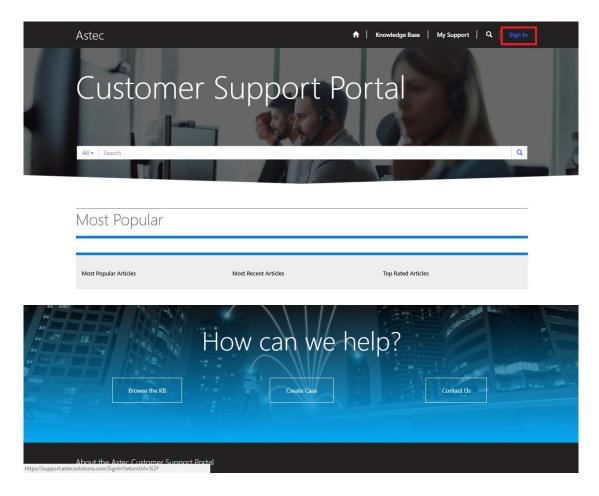
**Please note**, in order for the Support Portal to **send emails to you**, you will need to leave the "**Email**" checkbox ticked under the "**How may we contact you**?" section.

Portal User	you make on the site.	urself. le will be displayed alongside any comments, forum posts, or ideas required but will not be displayed on the site.
Profile	Your <b>Organization</b> is required, and a <b>Title</b> i posts.	is optional. They will be displayed with your comments and forum
Security	Your Information	
Change Password	First Name *	Last Name *
Manage External Authentication	NAME	NAME
	E-mail	Business Phone
	EMAIL	***** *****
	Organization Name	Title
	COMPANY	
	Nickname	Web Site
		ll.
	Preferred Language	
	How may we contact you? Se	lect all that apply.
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### **2 LOGGING INTO THE PORTAL**

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



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.

Astec		↑ Knowledge Base	My Support   Q,   Sign In
Sign In Redeem Invitati	ion		
Sign in with a local account	t	Sign in with an external account	
	sername	Office 365	
	Remember me? gn In Forgot Your Password?		
Browse the Ki		we help?	Contact Us
About the Astec Customer This site provides case manageme			
Copyright © 2018. All rights reserved.	Support Knowledge Base		

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.

Astec read and the second seco
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- 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.

	Astec		↑ Knowledge Base   My Support   Q	Portal User 🖌
	Custome	r Support	Portal	<b>Q</b>
	Most Popular			
	Most Popular Articles	Most Recent Articles	Top Rated Articles	
	Browse the KB	How can w Create Case Create	e help? te Case	
https://support.astec	About the Aster Customer Support is solutions.com/support/create-case/	Portal		

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.

#### Support

	<b>Q</b> What can we help you with?			
E Active Cases → Search Q Open a New Case	Reg. User login is failing			٩
	I≣ Active Cases →	Search	٩	Open a New Case



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

Home > Support > Open a New Case			
Open a New Case			
Speri a New Case			
Title *			
Title to briefly describe the Issue			
Suggested Topics			
Knowledge Base - Home			
Issues for our customers. It is constantly upda	ited, expanded, and refined to ensi	ure that you have access to the very latest information	
Customer Case Reference		Customer * Portal Customer	
Case Type *		Contact * Portal User	
Priority *	•	End User	٩
Product	٩		
Product	٩		
		that will help us proceed with the investigation.	

#### Please fill out the below fields:

Title:	Give your case a descriptive title. This will make identifying the case easier in the future.
Case Type:	This is a drop down field. The types available are "Issue", "Change Request", "Root Cause Analysis", and "Information Request".
Priority:	This is a drop down field. Please choose a priority that matches the urgency of your issue.
Description:	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	
Q	
Description	
Give a thorough description here. Please provide as much information as possible that will help us proceed with the investigation.	
	1
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.

		۹					
Description	🜍 Open						
Give a thorough description here. Please provide as n	$\leftarrow \rightarrow \checkmark \uparrow$	🔤 « Po	rtal > Screenshot	~ Ū	Search Screenshot		P
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			📓 My File to Upload.png		06/07/2018 14:54	PNG File	
	> 🐔 OneDrive -	Astec IT S					
	> 💻 This PC						
	> 💣 Network						
Attach a File							
Choose Files No file chosen							
			<				
		Filen	ame: My File to Upload.png	~	All Files		~
_							
bmit Cancel		Then	wy the to opioad pig		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.

	Astec		į	🕇   Knowledge Base   My	Support 🛛 🔍 🛛 Portal User 🗸	
	Home > Support					
	Support					
	Q What can we help				٩	
Г	I≣ My Open Cases •		1.4200.0100.010.000	Search	Q Open a New Case	
	Case Number CAS-01036-Q1T7W1	Case Title Title to briefly describe the Issue	Case Type Issue	Status Reason New	Created On ↓ 06/07/2018 15:02	
	Browset		V CAN WE	help?	Contact Us	
	About the Astec Custor This site provides case manage	mer Support Portal gement for our support customers.				
	Copyright © 2018. All rights reserved		pport owledge Base			



## **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.

Astec		<b>↑</b>	Knowledge Base My S	upport   Q,   Porta	ıl User 🗸
Home > Support					
Support					
<b>Q</b> What can we he	lp you with?				
* e.g. User login is	s failing				Q
🗮 My Open Cases 🗸			Search	Q Open a Nev	v Case
My Open Cases My Closed Cases	Case Title	Case Type	Status Reason	Created On 🕹	
All My Cases	Another Open Ticket	Issue	In Progress	06/07/2018 15:07	~
Active Cases	Title to briefly describe the Issue	Issue	Acknowledged	06/07/2018 15:02	~

× e.g. User login is	failing		To search on partial text the asterisk (*) wildca character.		Q
🗮 All My Cases 🗸			Search	Q Open a New	w Cas
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:



Title to briefly describe the Issue     Image: I		efly describe	e the Issue
Circle Axiomaticage   Case Number   Case Number   Case Number   Case Outprove   Title to briefly describe the Issue   Porting   Case Type *   Case Type * <th></th> <th>etly describe</th> <th>e the issue</th>		etly describe	e the issue
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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:	3 days ago Modified on 06/07/2018 15:48	Support Desk Response Astec will add a response o add further information wh Created by Chris Smialowsk Incoming Customer Suppo Case Created - CAS-01030 Hello, You are receiving this email be details are: Customer: Portal Customer Customer: Portal Customer Tittle: Tittle to briefly describe to	iser on the portal here. Please review the information provided and nere necessary. ki ort → Support Cases (No Support Contract) 6-Q117W1 CRM:0001017 ecause a new case (CAS-01036-Q117W1) has been raised. This case's sr
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Fix: Resolve:	3 days ago Modified on 06/07/2018 15:48	Support Desk Response Astec will add a response o add further information wh Created by Chris Smialowsi Incoming Customer Suppo Case Created - CAS-01036 Hello, You are receiving this email be details are: Customer: Portal Customer Customer: Contact: Portal Use Title: Title to briefly describe t Priority: Level 3/Minor Status: New This case has several agreed K our Service Level Agreement f Case Acknowledgement: First Response:	iser on the portal here. Please review the information provided and here necessary. ki ort → Support Cases (No Support Contract) 6-Q1T7W1 CRM:0001017 ecause a new case (CAS-01036-Q1T7W1) has been raised. This case's sr the Issue key Performance Objectives, which need to be met in order to meet
To meet the <b>Case Acknowledgement</b> Key Performance Objective, simply acknowledge the case.	3 days ago Modified on 06/07/2018 15:48	Support Desk Response Astec will add a response o add further information wh Created by Chris Smialowsk Incoming Customer Suppo <b>Case Created - CAS-0103(</b> Hello, You are receiving this email be details are: Customer: Portal Customer Customer: Portal Customer Customer: Portal Customer Customer: Portal Customer Customer: Portal Customer Status: New This case has several agreed K our Service Level Agreement Case Acknowledgement: Hrist Response: Fix:	iser on the portal here. Please review the information provided and here necessary. ki ort → Support Cases (No Support Contract) 6-Q1T7W1 CRM:0001017 ecause a new case (CAS-01036-Q1T7W1) has been raised. This case's sr the Issue key Performance Objectives, which need to be met in order to meet
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to meet the more approved by renormance objective, preuse respond to the case in you are in a	3 days ago Modified on 06/07/2018 15:48	Support Desk Response Astec will add a response o add further information wh Created by Chris Smialowsk Incoming Customer Suppo Case Created - CAS-01036 Hello, You are receiving this email be details are: Customer Portal Customer Customer Portal Customer Customer Portal Customer This: Title: Title to briefly describe t Priority: Level 3/Minor Status: New This case has several agreed K our Service Level Agreement f Case Acknowledgement: First Response: Fix: Resolve: To meet the Case Acknowledge This will not assign the case to	Iser on the portal here. Please review the information provided and here necessary. ki ort → Support Cases (No Support Contract) G-Q1T7W1 CRM:0001017 ecause a new case (CAS-01036-Q117W1) has been raised. This case's sr the Issue Key Performance Objectives, which need to be met in order to meet for Portal Customer. These objectives are:

3 days ago

Case Created - CAS-01036-Q1T7W1 CRM:0001017

Incoming Customer Support  $\Rightarrow$  Support Cases (No Support Contract)



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

Timeline	Add Comment
3 days ago	Chris Smialowski → Portal User Support Desk Response
Modified on 06/07/2018 15:48	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.



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	Add a Comment	My Sup X	port
Home > Support <b>&gt; CAS-01038-R2D</b>	* Comment	Customer response to the Astec Support Desk should be entered here.	
Another Open Issue Active - In Progress		Further files and/or screenshots can be added by using the "Choose File" button below.	
Case Number CAS-01038-R2D2Y8	Attach a File	Choose File No file chosen	
Title * Another Open Ticket		Submit	
Contract Construction		F	

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		<b>ft</b>	Knowledge Base My Su	upport   Q   Port	al User <del>-</del>
Home > Support					
Support					
<b>Q</b> What can we hel	p you with?				
* e.g. User login is	failing				٩
	failing		Coursh		
I My Open Cases →			Search	Q Open a Ne	
I My Open Cases - Case Number	Case Title	Case Type	Status Reason	Created On 🕇	ew Case
I My Open Cases →		Case Type Issue			
I My Open Cases - Case Number CAS-01043-H2Q1C7	Case Title		Status Reason	Created On 🕇	ew Case
I≣ My Open Cases → Case Number CAS-01043-H2Q1C7 CAS-01042-N6M9B0	Case Title A Resolved Case	Issue	Status Reason Fixed	Created On ↓ 09/07/2018 13:51	ew Case
I≣ My Open Cases → Case Number CAS-01043-H2Q1C7 CAS-01042-N6M9B0 CAS-01041-M5W7R3	Case Title A Resolved Case Case On-Hold (until specified time)	Issue	Status Reason Fixed On Hold	Created On ↓ 09/07/2018 13:51 09/07/2018 13:50	ew Case
I My Open Cases - Case Number	Case Title A Resolved Case Case On-Hold (until specified time) Case Requires further Customer Input	Issue Issue Issue	Status Reason           Fixed         On Hold           Waiting for Details         Other Status	Created On ↓ 09/07/2018 13:51 09/07/2018 13:50 09/07/2018 13:50	ew Case

Status Reason	Description
New	A newly created case. The Astec Support Desk have yet to take any action on the case.
Acknowledged	The Support Desk have viewed the case and acknowledge this by setting this status.
In Progress	The Support Desk have reviewed the case and begin taking necessary actions.
Waiting For Details	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.
On Hold	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.
Resolved	A completed case, or a case which no longer requires further action.