Genesys Care

My Support Information Guide for PureEngage On-Premise

Updated January 2019

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About the My Support Information Guide

◦ This guide gives you quick, visual tips on the features of My Support (the Customer Care Portal) including how to open and manage Cases.

◦ Please refer to the Support Guides and Support Processes for full details on service level targets and how to work with Customer Care, including Case Management.

◦ You must also be a Designated Contact to open Cases. Please visit our FAQs for more information.

Genesys Knowledge Network

○ The Genesys Knowledge Network demystifies the task of navigating a maze of portals and empowers you to be more independent and efficient. This all-in-one portal is your access point to everything Genesys.

○ If you're a Designated Contact for Genesys, go to know.genesys.com and sign in. The Genesys Knowledge Network knows who you are, what you bought, and only shows you what's relevant depending on whether you have PureCloud, PureConnect, or PureEngage. Your content includes product-relevant Community posts, a link to your My Support page for Case Management, billing information, your PureSuccess token count, contact information for your CSM or Genesys Advisor, and much more.

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Quick Tips: What to do

Problem with the operation of Genesys products in production	*Submit a Support Case in My Support or call Customer Care**	Problems with My Support login	*Email Customer Care customercare@genesys.com*
Report a severe impact or degradation to business operations	*Call Customer Care for immediate evaluation**	Information required for product pricing or a quotation	*Contact your Account Executive*
Post-production technical questions about the operation of your Genesys application	*Submit a Support Case in My Support or call Customer Care**	You have anticipated application or product additions	
Problem with Genesys Care tools or the mobile app	*Submit a Support Case in My Support or call Customer Care**	Changes regarding the status of your Genesys account	
Problem with your custom professional services application	*Submit a Support Case in My Support or call Customer Care**	You have architecture or design questions	
Requesting My Support access level change and other actions regarding my account	*Login to My Support and select My Support Access from the bottom left*	Billing concerns	
Changes with My Support profile such as updates to email address or phone numbers	*Login to My Support and select My Profile from the bottom left*	Existing Case follow-up	*Post updates to the Case in My Support. Or, reply to an Email originated from the Case which includes a special Reference ID, which will tie any reply back to the Case.*
My Support functionality issues	*Submit an Admin Case in My Support*	Product change or Feature Requests (FRs)	*Submit a change request in the Product Ideas Lab. Update existing FRs in My Support.*
Product does not show in drop-down list		Questions about Genesys Care	*Contact your Genesys Care Representative*
File upload/download issues when using "File Transfer" function			

*Visit www.genesys.com/customer-care/contact-us for Customer Care phone numbers

My Support: Login from the Customer Care Website

**http://www.genesys.com/customer-care**

My Support Login

Login to My Support for:

- Support Information
- Case Management
- Knowledge Search
- Community
- Product Documentation
- Tech Tutorials
- Genesys Care Apps & Tools
- Customer Care News and Product Advisories

From this page, you can also:

- Contact Customer Care
- View our FAQ page
- Visit the Product Documentation sites

My Support: Request an Account

http://www.genesys.com/customer-care
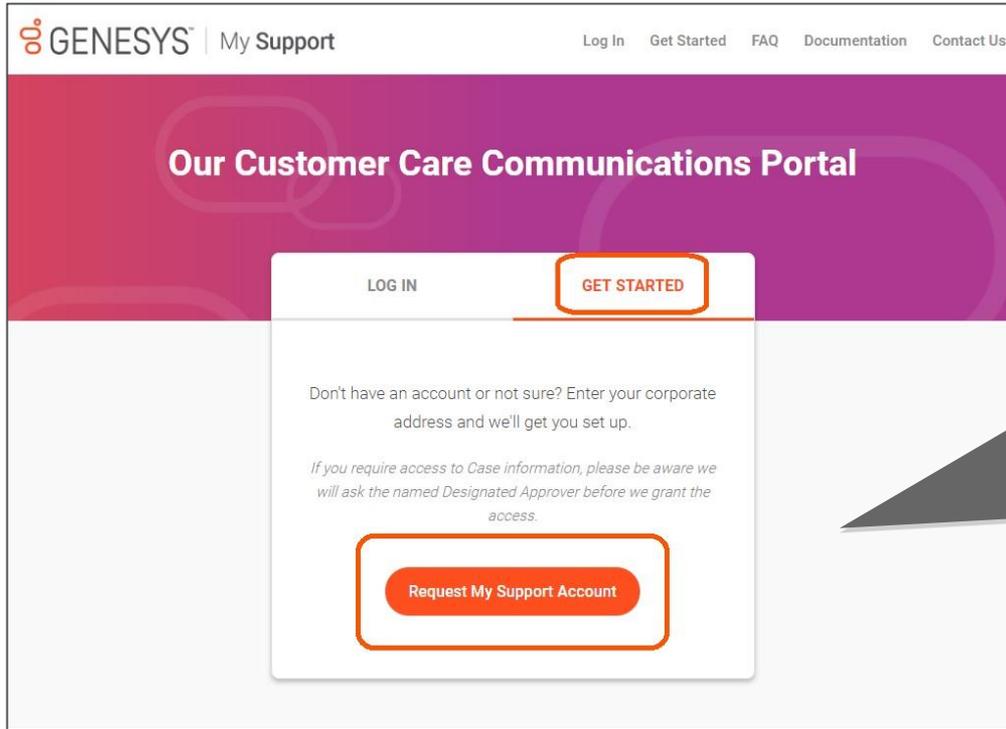
Request My Support Login

- Select 'Get Started'
- Select 'Request My Support Account'
- You will be asked to provide your corporate email address

Three My Support Access Levels:
- Basic Access
- Read-Only
- Read-Write (Designated Contact)

My Support: Dashboard

Select 'Continue to your Dashboard' to access the My Support Quick Links

Security Advisories and Support Articles, Tech Tutorials, and Featured News and Events will display on the page after login.

My Support: Dashboard

If you have access to multiple product Dashboards, you can switch between them by expanding the drop down list and selecting one product or another.

Access many My Support features from the Dashboard. The Quick Links displayed will depend on your level of Support Access.

My Support: Dashboard

The 'My Cases' quick link gives you one-click access to your current Non-Closed Cases consolidated on one page

Select 'Case Search' to quickly search for Cases using Case Number or Keywords

My Support: My Cases

Quickly locate all your Non-Closed Cases using the 'My Cases' quick link

The 'My Cases' list includes Non-Closed Cases that satisfy the following criteria:

- <u>Cases Contact</u> = Logged in user of My Support
- <u>Case Types</u>: Support Case, Service Requests (including Data Privacy requests), Feature Request, or Admin Cases
- <u>Product lines</u>: PureEngage On-Premise, PureEngage Cloud, PureConnect On-Premise, PureConnect Cloud, PureCloud, or non-product specific (i.e. Admin Cases)
- <u>Sort Order</u>: most recently updated Cases on top

# My Support: Support Documentation
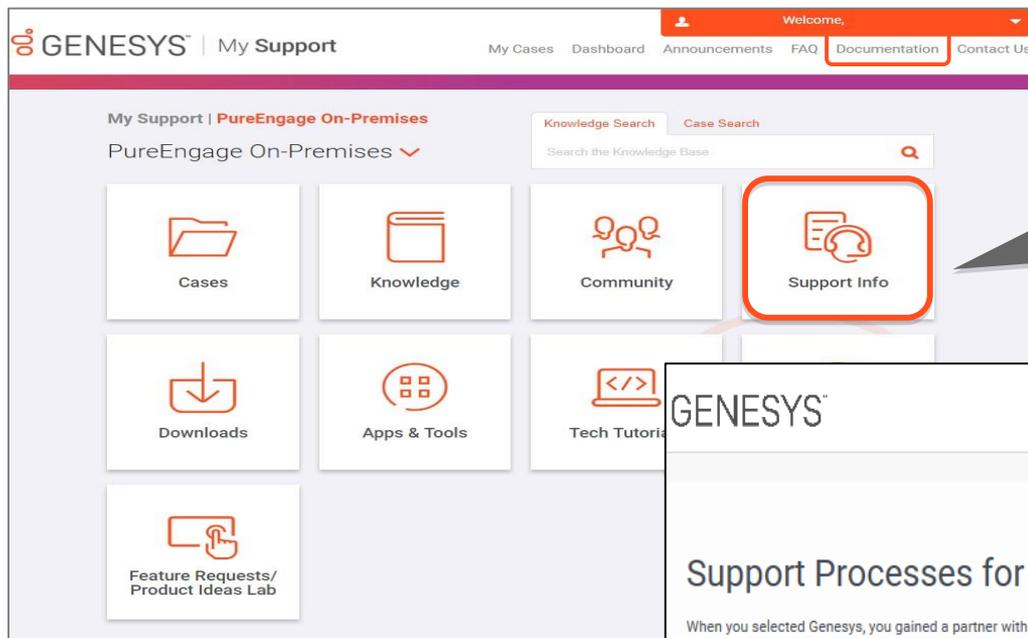
Support Info provides access to online documents which include details on how to work with Genesys Customer Care for Case Management, using the Knowledge Base, and guidance on other My Support features (Community, Tech Tutorials, etc.).
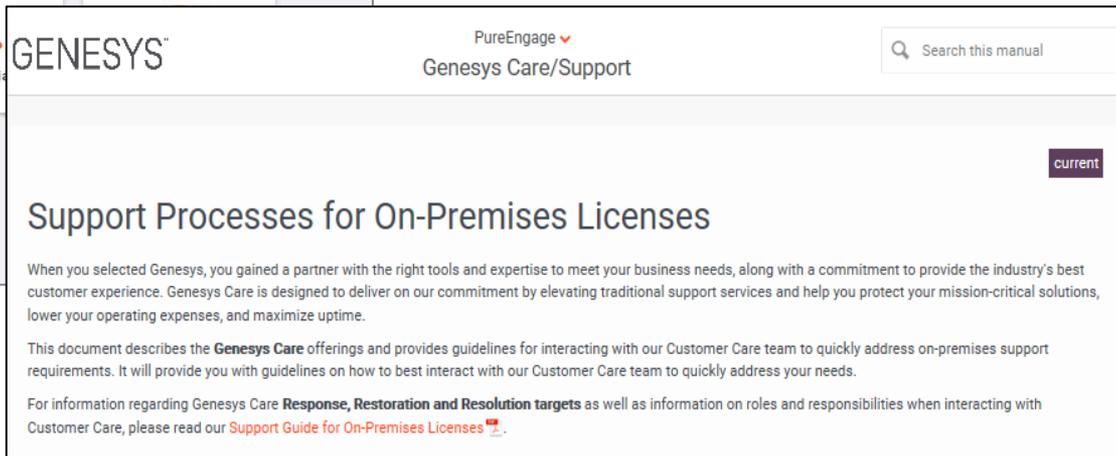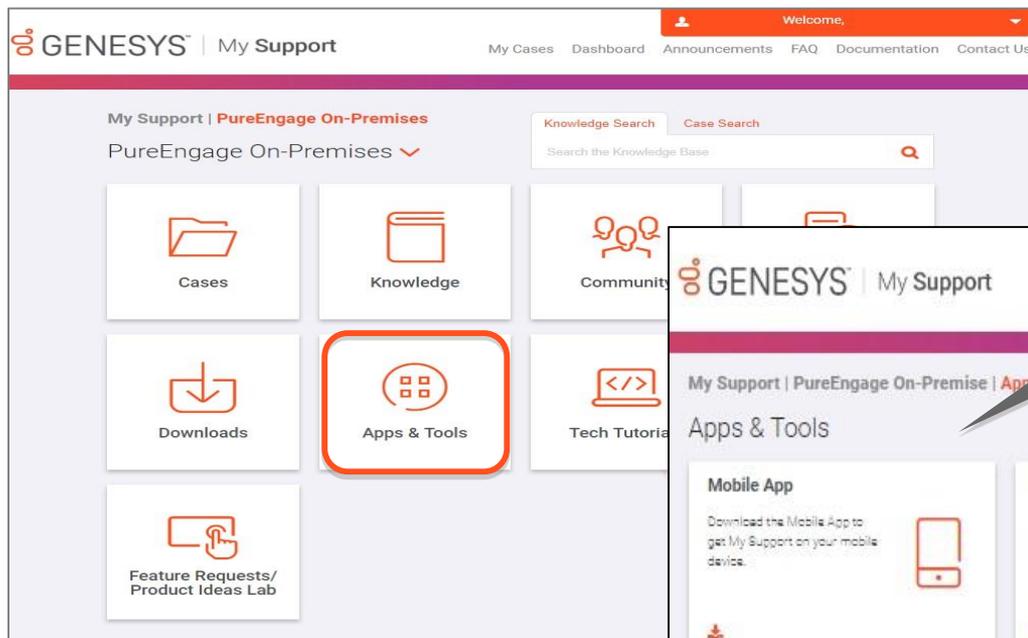
My Support: Support Documentation

Login to My Support, select 'Documentation' from the top menu, then PureEngage.
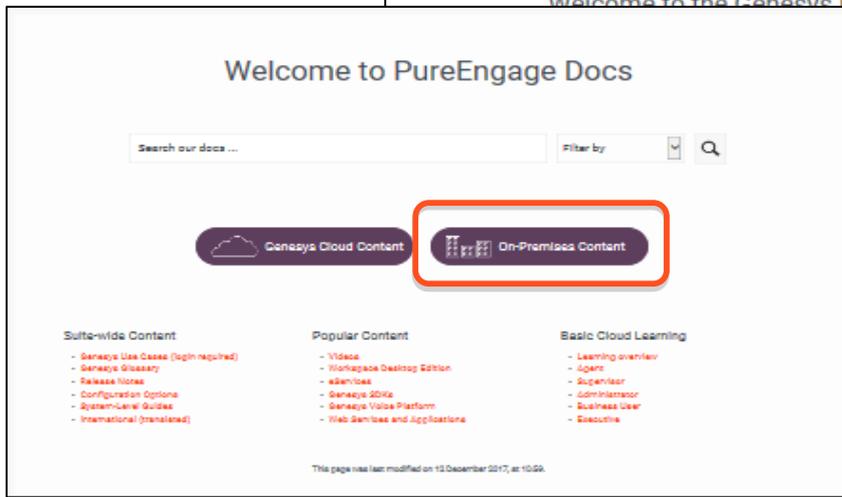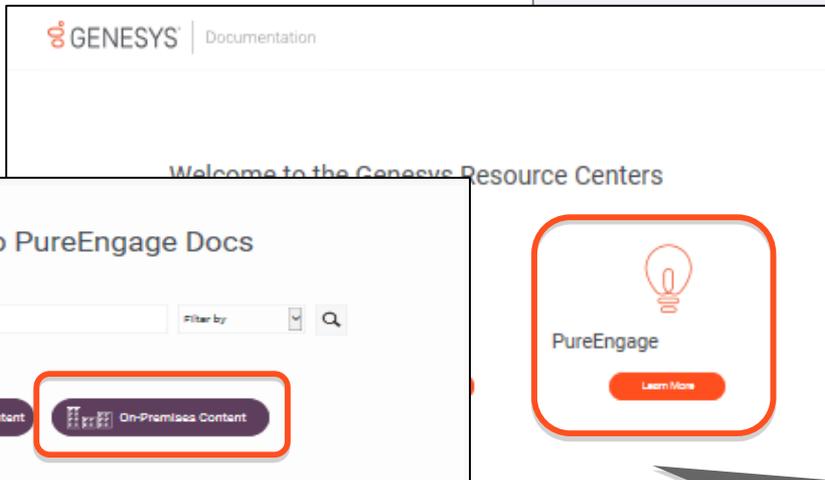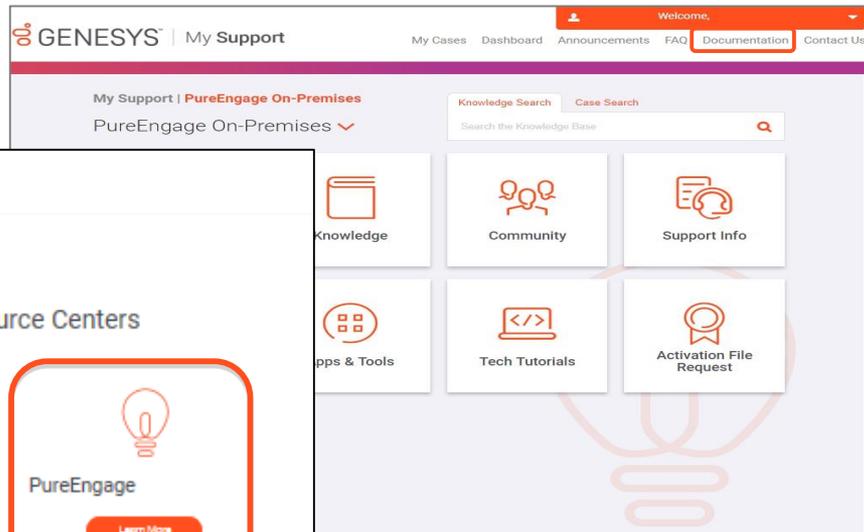
Support Guides are online guides that provide full information on Service Level Targets and Responsibilities.

# My Support: Apps & Tools

Access these links to learn more about apps, tools and services available to you like Mobile App, Workbench, Log File Management Tool, Log File Masking Utility, Remote Alarm Monitoring with Workbench, and Other Tools.
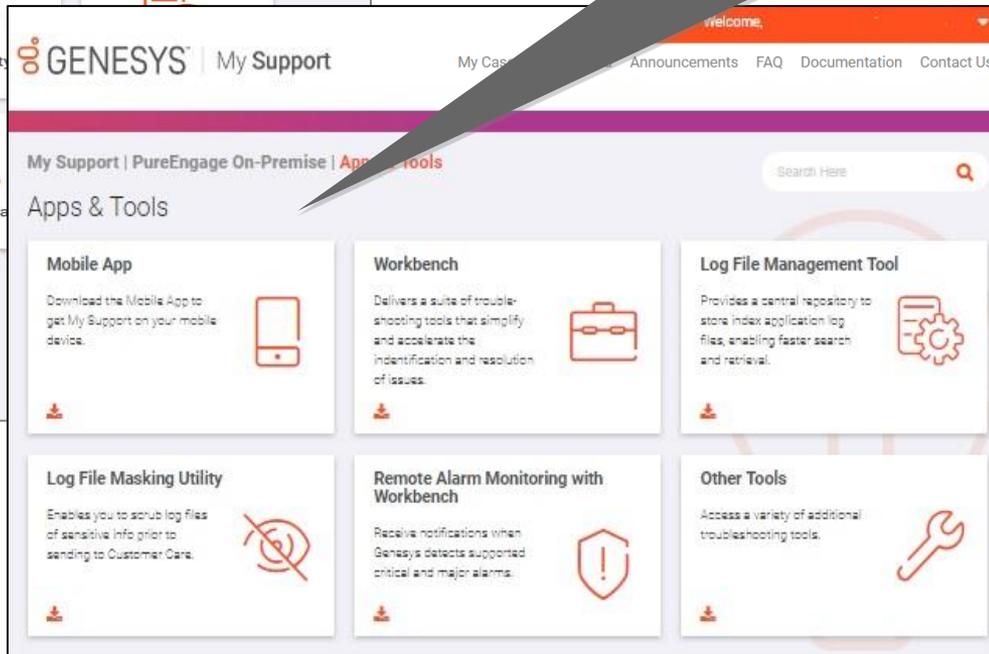
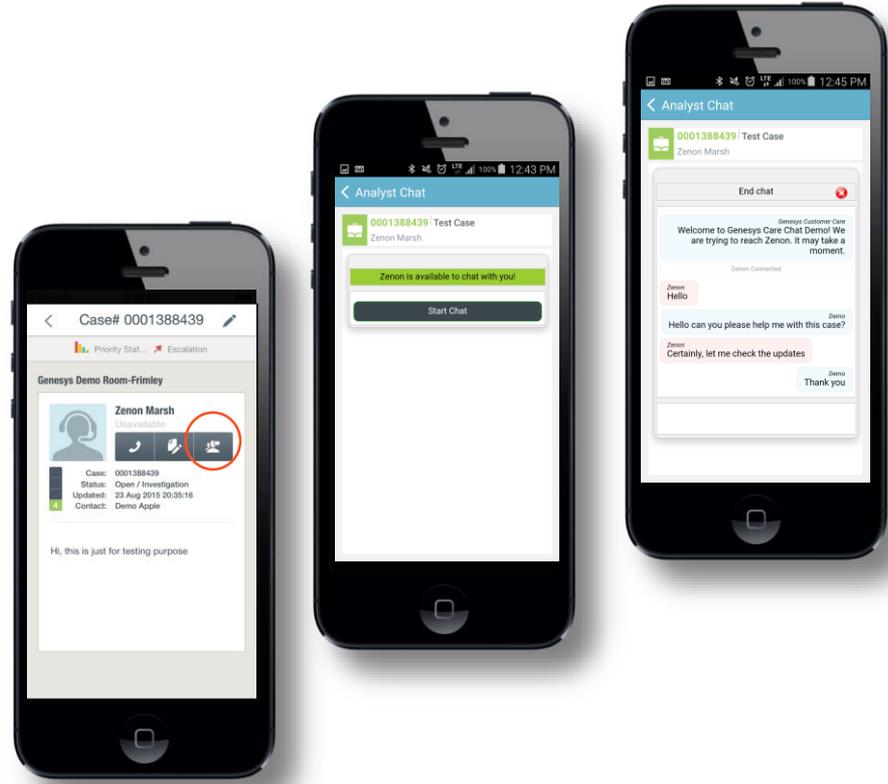# Genesys Care Mobile App

Mobile App Features

o   iOS and Android

o   Review your open Cases, including all public case updates

o   Post updates to your Cases

o   Contact any of our regional Customer Care Centers

o   Request Case closure

o   Receive alarm notifications and view alarm data*
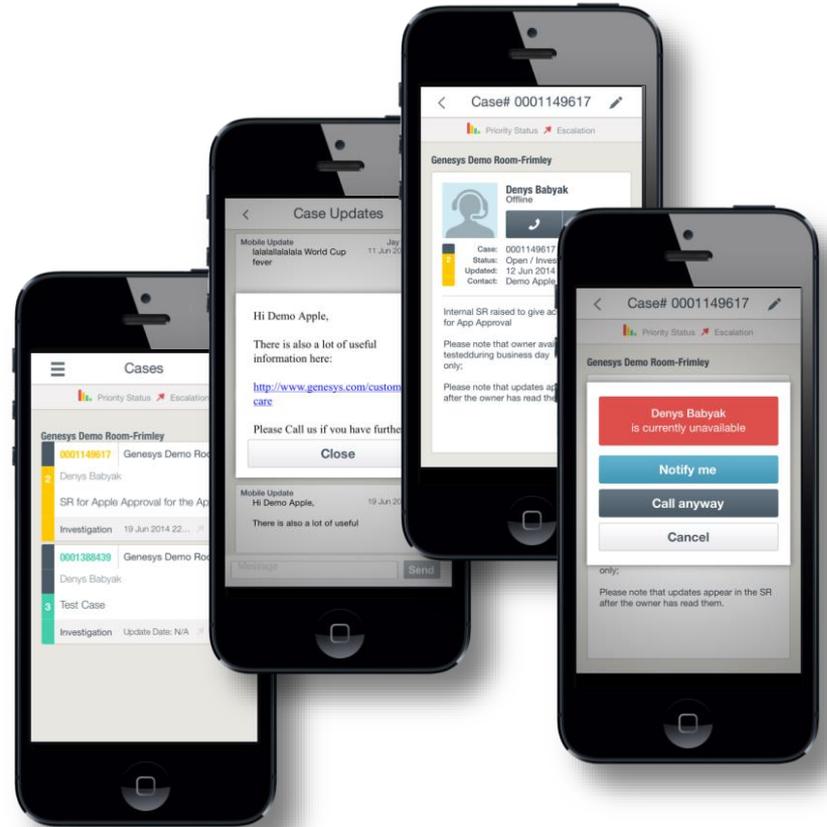
Genesys Care Mobile App

Supports Chat

o Available to Designated Contacts

o Request Chat with your assigned Case Owner for any Open Case

Genesys Care Mobile App

Mobile App Setup

o Download the App:
  • iOS
  • Android
o Successfully sign into **My Support** from your computer/laptop at least once
o Sign into the Mobile App with your:
  • Corporate Email
  • Password
  • PIN*
  • Phone Number
o If you experience any issues such as **Incorrect PIN** or **Authentication Failed**, please email care.mobile@genesys.com

*To find your PIN, login to My Support and select the dropdown arrow by your username then Manage Profile. Then select My Profile to locate your PIN.
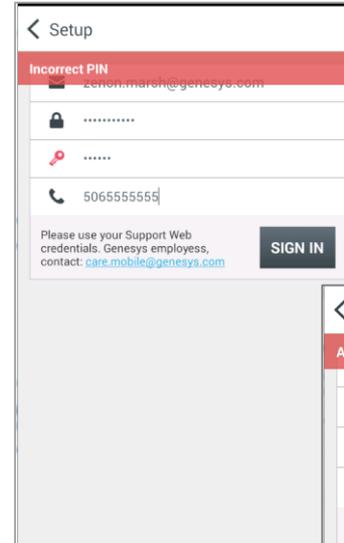
If you experience Mobile App login issues, please email care.mobile@genesys.com
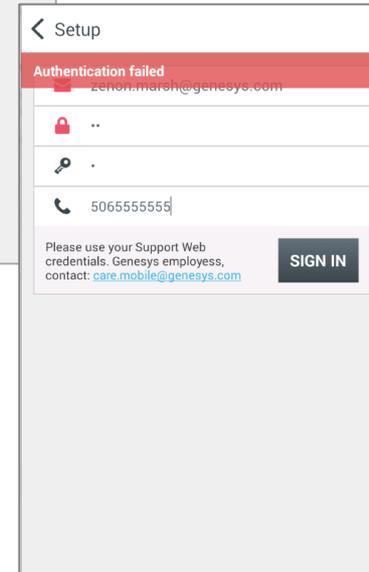
Genesys Care Workbench

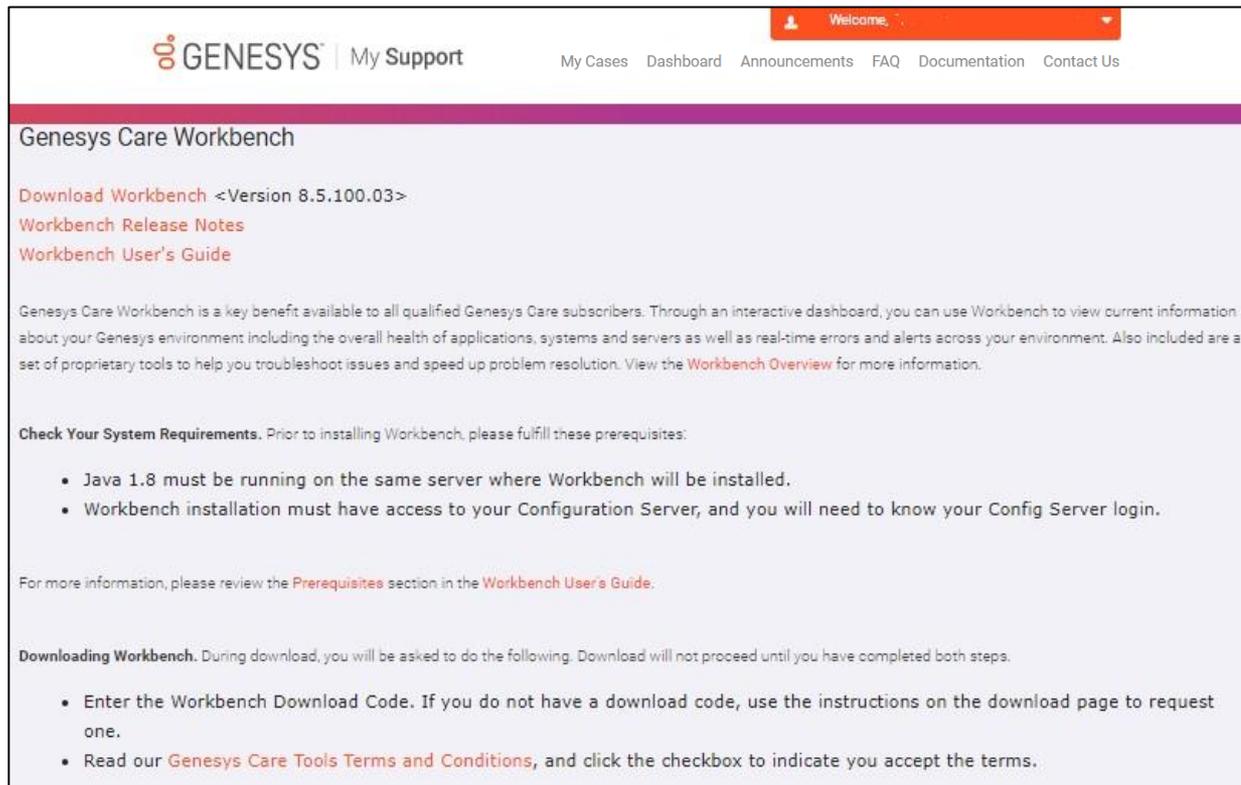A suite of troubleshooting tools to identify and resolve issues faster

- Gain additional data to oversee the overall health of the Genesys environment
- Identify issues faster using event correlation data
- Drill down on specific events to target relevant log files that should be captured and provided to Customer Care
- Provide better data for support Cases
- Quickly see recent application changes in Configuration Server, as an aid in troubleshooting issues
- Schedule IVR and contact center call flow tests to identify trends and problems
- View critical/major alarms data to quickly find the root cause of potentially serious issues (must have Remote Alarm Monitoring with Workbench)

My Support: Downloading Workbench
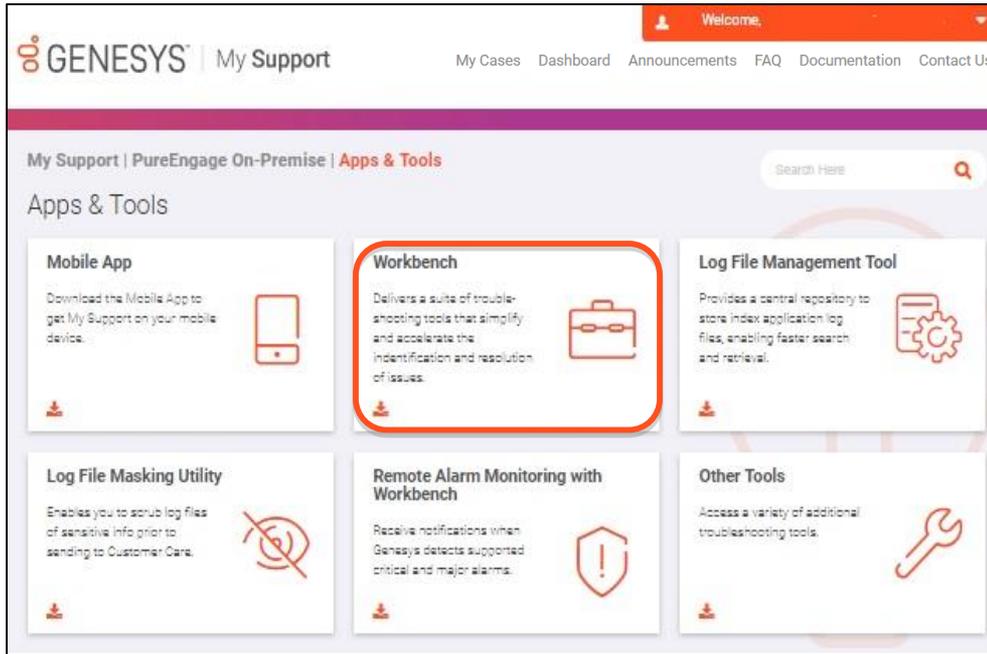
◦ Select 'Apps & Tools' from the Quick Links.

◦ Select 'Workbench' where you will be directed to a Workbench page with details on how to get started.

My Support: Downloading Workbench

- The **Workbench** page provides information on
  - Installation prerequisites
  - Where to find the Workbench User's Guide
  - Other tools such as Log File Management Tool and the Mobile App
  - Remote Alarm Monitoring

- Select '**Download Workbench'** to begin the installation process

My Support: Downloading Workbench

◦ Enter the **Workbench Download Code** available from your Genesys Care Representative

◦ Accept the **Genesys Care Tools Terms and Conditions**

Workbench Dashboard

- 15 supported alarm types displayed

- LFMT must be installed for data to populate

Workbench Log Analysis Console

The Log Analysis feature of Workbench allows you to use log files for troubleshooting more efficiently. With this tool, you can identify log event sequences and anomalous behavior.

Log files you can view include SIP Server, T-Server, and Genesys Voice Platform (GVP) components.

Workbench Channel Monitoring

o   Create and run recurring test calls that model call flows through IVR menus down to agents, to continuously monitor the health of the call processing environment and identify potential interaction issues before your customers are impacted

o   View the status of recent test calls in reports showing overall test results, call quality, and other metrics

o   Configure thresholds for various call test parameters and error conditions so that when a configured threshold is exceeded, an alert will be displayed on the Channel Monitoring row of the Workbench Event Correlation widget

Workbench Alarm Monitoring Console

Must have Remote Alarm Monitoring to view

Genesys Care Log File Management Tool

Install our **Log File Management Tool (LFMT)** for:

o A central repository to store indexed application log files to enable faster search and retrieval capabilities.

o Use of a scrubbing feature so that log files uploaded to Customer Care do not contain sensitive information.

o Enabling **log events data** to populate in the Workbench event correlation grid.

o To download LFMT, login to My Support and select **Log File Management Tool** from the right-side menu.

Genesys Care Log File Management Tool

On our Technical Documentation site, we also have the LFMT Deployment and User Guide for you to reference. Visit https://docs.genesys.com/Documentation/ST/latest/DeploymentGuide/Welcome* for more information.

*Requires login through My Support

Genesys Care Log File Retrieval Service

o Request the **Log File Retrieval Service** and enable Customer Care to perform log file retrieval for you when a support case is submitted.

o **Log File Management Tool** is required

Additional information for the Log File Retrieval Service is available on our Technical Documentation site:
https://docs.genesys.com/Documentation/ST/latest/Premise/WorkingWith#t-1*.

*Requires login through My Support

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Log File Masking Utility

This utility is a standalone version of the data scrubbing function in the Log File Management Tool (LFMT) and is designed specifically for users that have not had the benefit of downloading and installing LFMT. The utility serves the important need of sanitizing critical information from log files before they are sent to Customer Care for support case investigation. For more information and to download, login to <u>My Support</u> and select Other Tools from the right-side menu.

On our Technical Documentation site, we also have the Log File Masking Utility User's Guide for you to reference. Visit https://docs.genesys.com/Documentation/ST/current/LogFileMaskingUtility/Welcome* for more information.

*Requires login through My Support
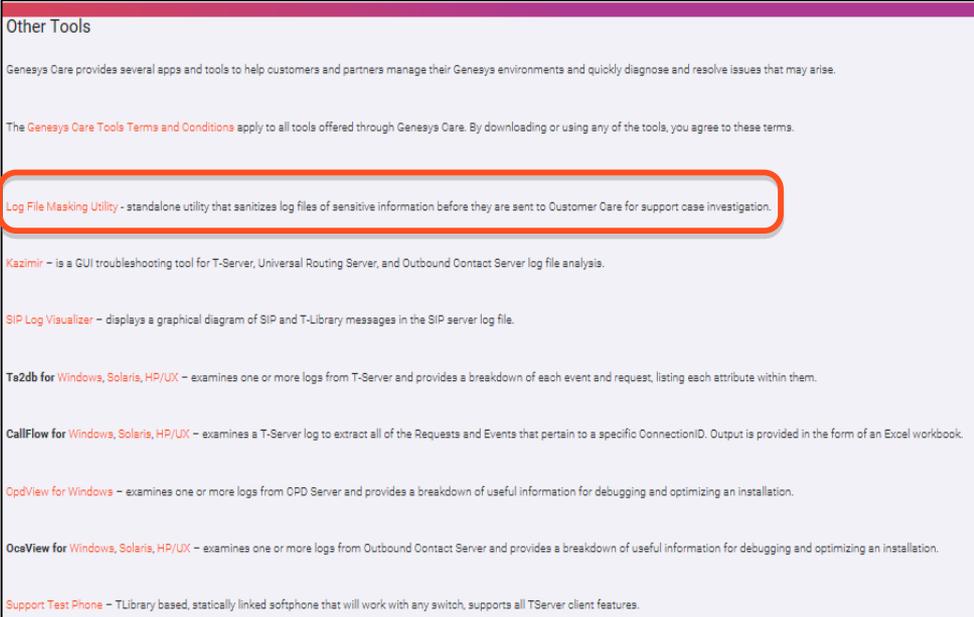
Other Tools

Genesys Care provides several apps and tools to help customers and partners manage their Genesys environments and quickly diagnose and resolve issues that may arise.

The Genesys Care Tools Terms and Conditions apply to all tools offered through Genesys Care. By downloading or using any of the tools, you agree to these terms.

Log File Masking Utility - standalone utility that sanitizes log files of sensitive information before they are sent to Customer Care for support case investigation.

Kazimir – is a GUI troubleshooting tool for T-Server, Universal Routing Server, and Outbound Contact Server log file analysis.

SIP Log Visualizer – displays a graphical diagram of SIP and T-Library messages in the SIP server log file.

Ta2db for Windows, Solaris, HP/UX – examines one or more logs from T-Server and provides a breakdown of each event and request, listing each attribute within them.

CallFlow for Windows, Solaris, HP/UX – examines a T-Server log to extract all of the Requests and Events that pertain to a specific ConnectionID. Output is provided in the form of an Excel workbook.

OpdView for Windows – examines one or more logs from OPD Server and provides a breakdown of useful information for debugging and optimizing an installation.

OcsView for Windows, Solaris, HP/UX – examines one or more logs from Outbound Contact Server and provides a breakdown of useful information for debugging and optimizing an installation.

Support Test Phone – TLibrary based, statically linked softphone that will work with any switch, supports all TServer client features.

My Support: Community
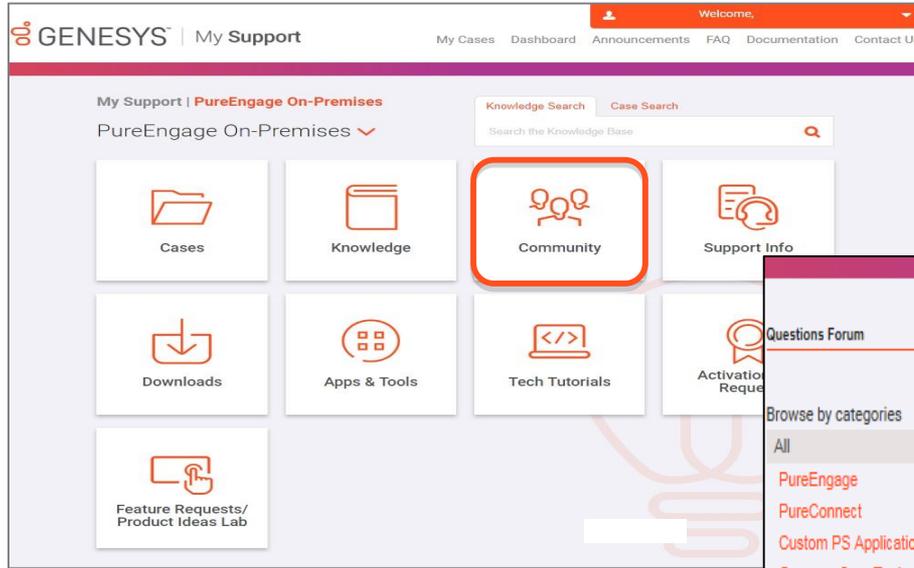
The Genesys Customer Care Community site provides access to Customer forums and other interactive features. You can use the Customer Care Questions Forum to ask technical questions and exchange ideas with other Customers and Genesys staff.
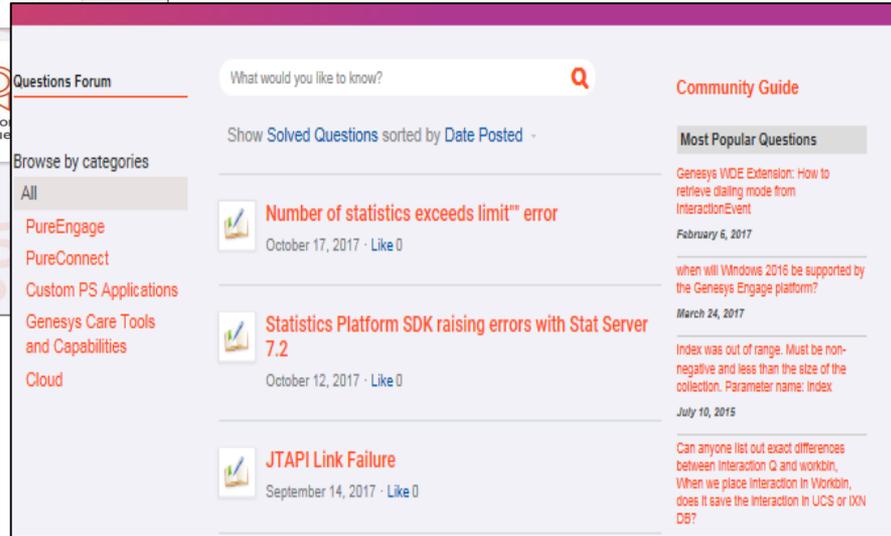
Login to My Support, select '**Community**' from the Dashboard. After login, you can also view the Support Processes for On-Premises Licenses for additional My Support: Community tips.

My Support: Knowledge Base

Login to My Support, select 'Knowledge' from the Dashboard. After login, you can also view the Support Processes for On-Premises Licenses for additional My Support: Knowledge Base usage and search tips.
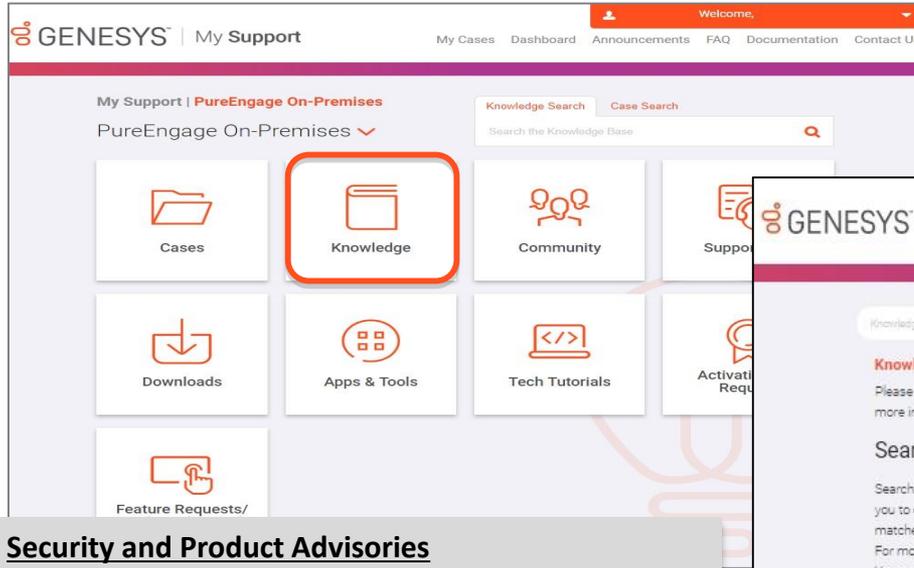
Security and Product Advisories
Genesys recommends that all Designated Contacts, at minimum, subscribe to **Genesys Security Advisories** to get immediate notification on critical security notices. To subscribe, login to My Support and read the Knowledge Base Advisories section in the Support Processes for On-Premises Licenses.
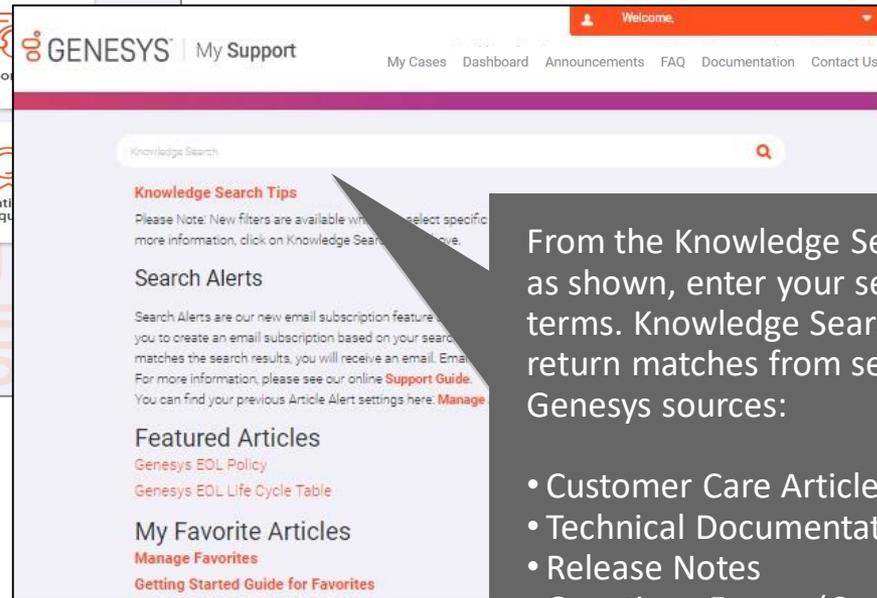
From the Knowledge Search page as shown, enter your search terms. Knowledge Search will return matches from several Genesys sources:

- Customer Care Articles
- Technical Documentation
- Release Notes
- Questions Forum (Community)

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My Support: Tech Tutorials
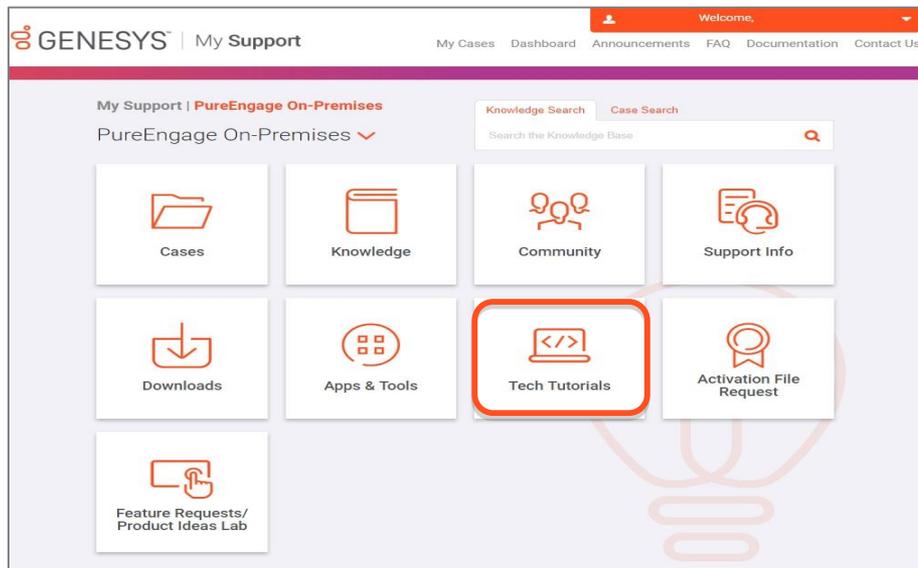
Login to My Support, select 'Tech Tutorials' from the Dashboard.

Subject matter experts design and present knowledge-sharing sessions that provide significant insight into optimizing the Genesys product portfolio. Tutorial topics include performance tuning, upgrade/migration planning, and troubleshooting techniques. Multiple live tutorials with Q&A time are delivered free each year to Customers and Partners with current service contracts.

A list of upcoming tutorials is always available on this Tech Tutorials page in My Support. Tutorials are also announced in the monthly Genesys Customer and Partner newsletters.

My Support: Software Downloads
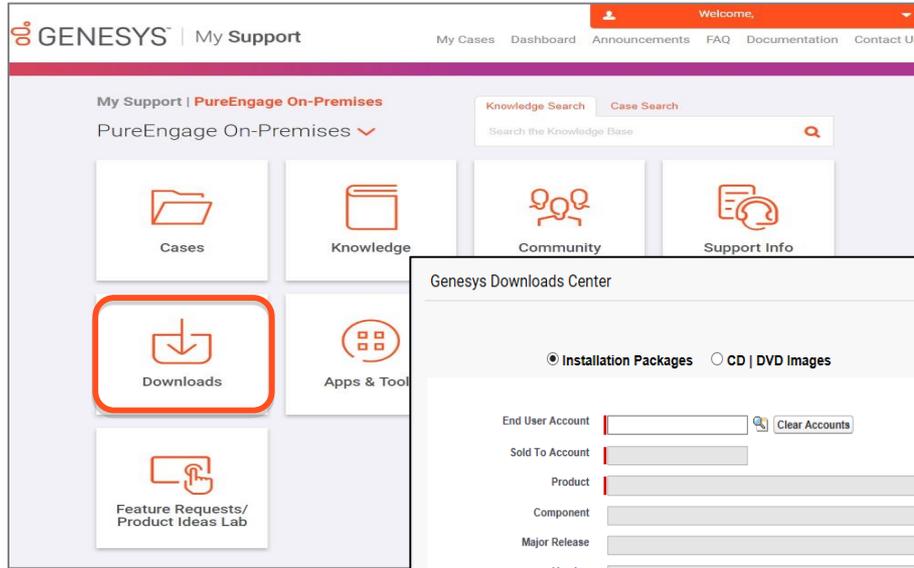
Login to My Support, select '**Downloads**' from the Dashboard. Please refer to Managing Software section in the Support Processes for On-Premises Licenses for instructions.

○ Genesys Care includes access to all Genesys software upgrade releases and hot fixes for licensed software purchased.*

○ Customers requiring assistance in the installation or configuration of upgrades or updates should refer to the Genesys Professional Services organization.

Must be a Designated Contact to access Software Downloads

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Tips: What to Check before Opening a Case*

◦ Have you checked the Release Notes?

◦ Have you searched the Genesys Knowledge Base?

◦ Have you looked in the Product Manual?

◦ Can you clearly define the issue you're having?

◦ Do you have documentation on your troubleshooting efforts and can you reproduce the issue?

◦ Are you prepared to send all relevant log files via our File Transfer Tool?

◦ Can you document the key search data to use within the supplied log files? This data could include connection IDs, telephone numbers, user data, agent IDs, and other information.

◦ Can you identify a clear business impact?

*For more details, please reference our Support Processes for On-Premises Licenses online content. You must login via My Support to view this content.

My Support: Opening a Support Case
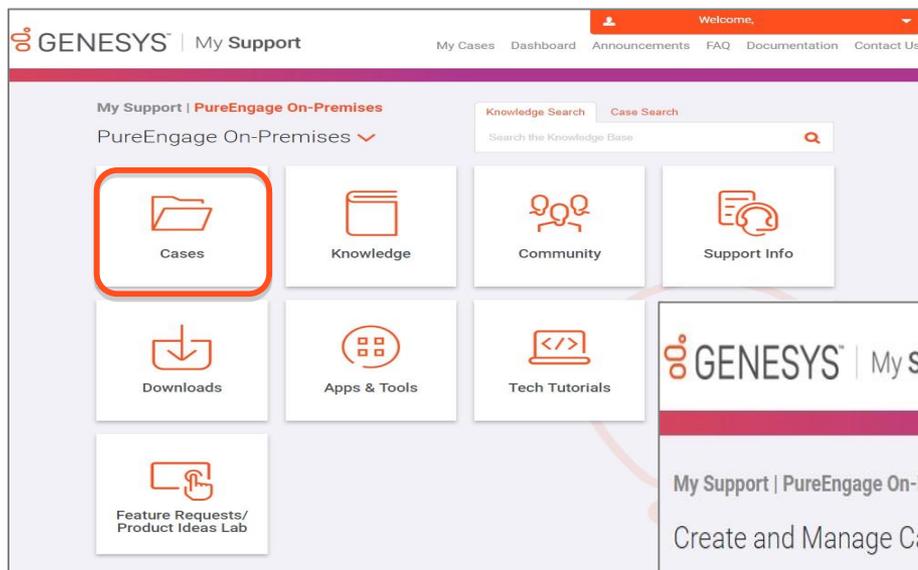
Begin by selecting
'Open a Support Case'

Note: Also make this selection to submit technical questions
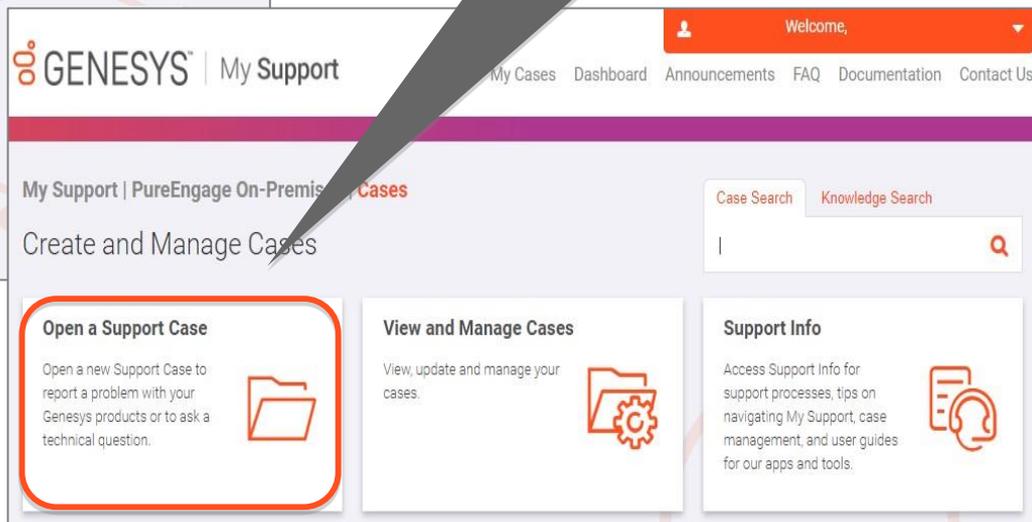
My Support: Opening a Support Case

If these fields are blank, select the 🔍 icon for selection options

Select Product Category for:

- PureEngage Products
- Genesys Care Tools
- Custom Professional Services Applications

 (see next slide for details)

My Support: Opening a Support Case

About the Product Category drop-down:
- The Product List and Custom PS Applications will reflect what is available to your account (or to a partner's end user account)
- Genesys Care Tools shows a list of all apps and tools

My Support: Opening a Support Case

On-Premise Support Case

Report problems with Genesys products or ask a product-related question

Case Sub Type
--None--
Question
Problem

Priority
2-High
3-Medium
4-Low

Environment Type: Production

Security Threat ☐

Subject

Description

Business Impact

OS: N/A   Database: --None--

Select Case Sub-Type 'Problem' if you have an issue or 'Question' if you have a technical question

Select the Case 'Priority' level (see Appendix)

Call Customer Care for immediate evaluation if you have a Critical issue to report

Provide detailed information in the Description and Business Impact fields to help us route your Problem or Questions to the appropriate product specialist

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My Support: Managing Your Support Cases

Select 'View and Manage Cases'

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My Support: Managing Your Support Cases

Export Support Cases into an Excel file
(Note: will export the filtered Case view as seen on your screen)

Filter your Case view

'My' Cases provides a view of Cases you have submitted

'All' Cases provides a view of all Cases submitted by your company

My Support: Managing Your Support Cases

❶ **Case Number**: *Assigned by Customer Care*

❷ **Subject**: *Description of Case*

❸ **Account:** Account Name

❹ **Status**: *Current status of the Case*

OPEN *(New; Investigation; Customer Responded; Engineering Request; Maintenance Review; Third-Party Pending)*
AWAITING INFO *(Info Required from Customer)*
SOLUTION PROPOSED *(Fixed – Software Provided; Replied; Resolved)*
CLOSED *(Cancelled; Resolved; Logged for Future Fix; Redirected; Customer Requested to Re-open)*

❺ **Priority**: *Assigned per Case severity; see slide 55*

❻ **Product Name**: *Name of impacted solution*

❼ **Date Opened**: *Date Case opened*

❽ **Date Modified**: *Last date that either Genesys or Customer posted a Case update*

❾ **Contact Name**: Designated Contact who opened the Case

My Support: Managing Your Support Cases

Case
0002068195

Status Summary | Post Update | Close Case | Transfer Files | Request Chat |

Status   Open   Priority   3-Medium
Sub Status   Update from Customer   Case Owner

Case Detail

Subject

Select 'Post Update' and
Case status automatically
changes from 'Awaiting Info' to
'Open – Customer Responded'

Close a Case (no need to
email/call Customer Care)

Upload logs and other files that may
be needed to
help resolve the Case

Version   7.6.200.06

Case Type   On-Premises Support Case   OS   Windows Vista 64-bit Compatibility
Created Date   1/10/2018 9:22 AM   Database   IBM DB2 9.7
Last Modified Date   1/10/2018 9:29 AM   3rd Party Products

My Support: Managing Your Support Cases

Chat with the assigned Case Owner

Designated Contacts can:

- Ask quick questions or inquire about Case status updates
- Leave a message if the Case Owner is unable to accept the Chat request
- Receive an email transcript of the Chat
- Access Chat via computer or mobile phone*

*Requires download of the Genesys Care Mobile App

My Support: Managing Your Support Cases

Additional Details on Chat

◦ Case Owners are assigned based on product knowledge available globally

- You may have a Case Owner that is in a different time zone than you.

- In this instance, live Chat for that Case might not be available during your local business hours.

◦ Used for Case facilitation and <u>not</u> for troubleshooting

◦ For details on how to use Chat, please reference our <u>Support Processes for On-Premises Licenses</u> online content.* For details on using Chat with our Mobile App, please reference our <u>Mobile App User Guide</u>.

*You must login via <u>My Support </u>to view this content

My Support: Re-opening a Closed Case

To re-open a Closed Case, select the Closed Case and select 'Request to Re-open'

My Support: Feature Requests / Product Ideas Lab

Designated Contacts are welcome to submit ideas for new product features

Select 'View and Manage Feature Requests' for FRs submitted before Sept 15, 2018
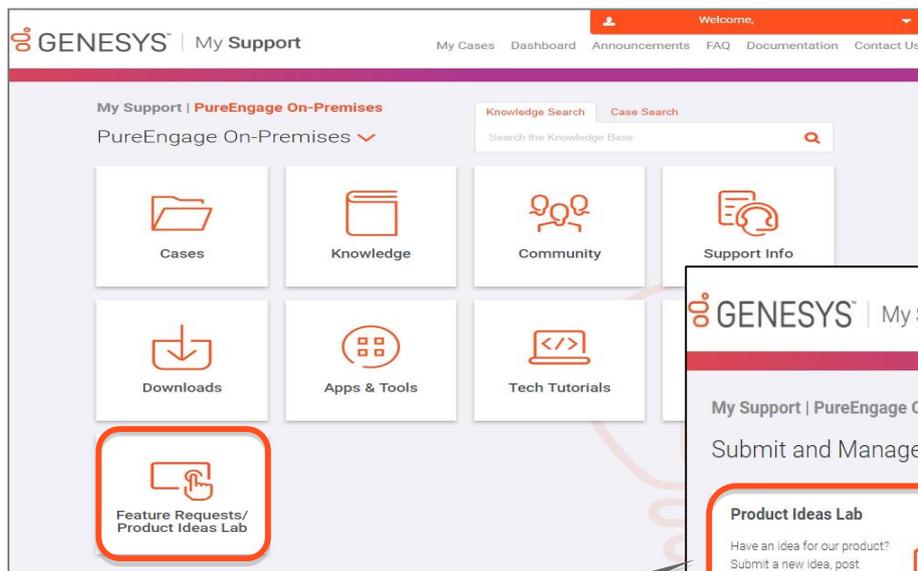
Select 'Product Ideas Lab' for NEW product features

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My Support: Managing Your Feature Requests

❶ **Case Number**: *Assigned by Customer Care*
❷ **Subject**: *Description of Feature Request*
❸ **Account:** *Account Name*
❹ **Status**: *Current status of the Feature Request*
   OPEN – CUSTOMER CARE *(New; Investigation; Info Required from Customer; Solution Proposed)*
   OPEN – PRODUCT MANAGEMENT *(New; Info Required from Customer; Under Review; Future Candidate; Planned; Committed)*
❺ **Sub-Status**: *See above*
❻ **Product Name**: *Product the Feature Request has been raised against*
❼ **Date Opened**: *Date FR opened*
❽ **Date Modified**: *Last date that either Genesys or Customer posted an update*
❾ **Contact Name**: *Designated Contact who opened the Feature Request*

Select 'View and Manage Feature Requests' to view the status.

My Support: Managing Your My Support Profile
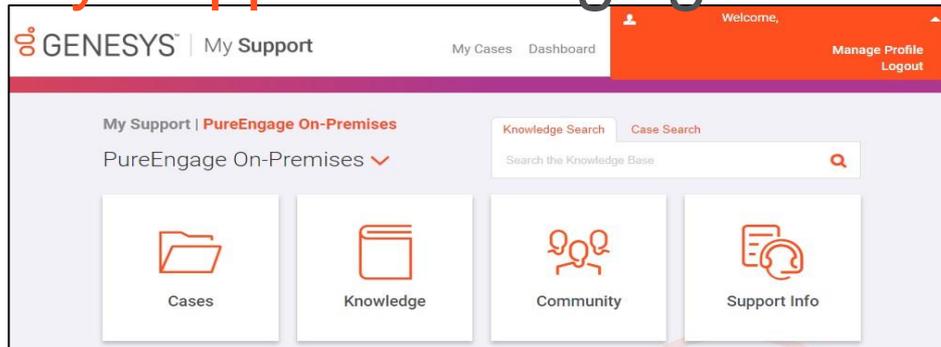
Select 'Manage Profile' to manage your My Support account including level of access, password changes and opening/managing Admin Cases when you have issues with your My Support login or the My Support menu views.

Select 'My Profile' to view and update your information
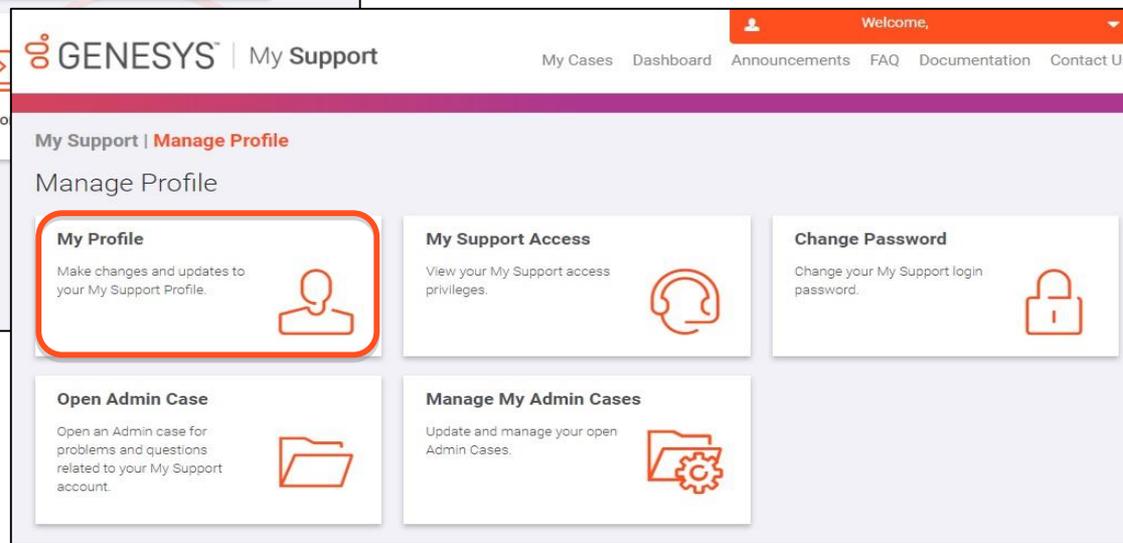
My Support: Managing Your My Support Profile

Contact Information

IVR Code / PIN   892386

Salutation	--None--	Address 1	
First Name		Address 2	
Middle Name		Zip Code	
Last Name		City	
Employer		State/Province	--None--
Email		Country	United States
Alternate Email		Mobile Phone	
Preferred Method	Email	Contact Phone	
Preferred Language	English	Fax	

Update Contact Info   Return

Location of PIN number *(required when calling Customer Care or using the Genesys Care Mobile App)*

If you update your profile, select 'Update Contact Info' before exiting

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My Support: Viewing Your My Support Access
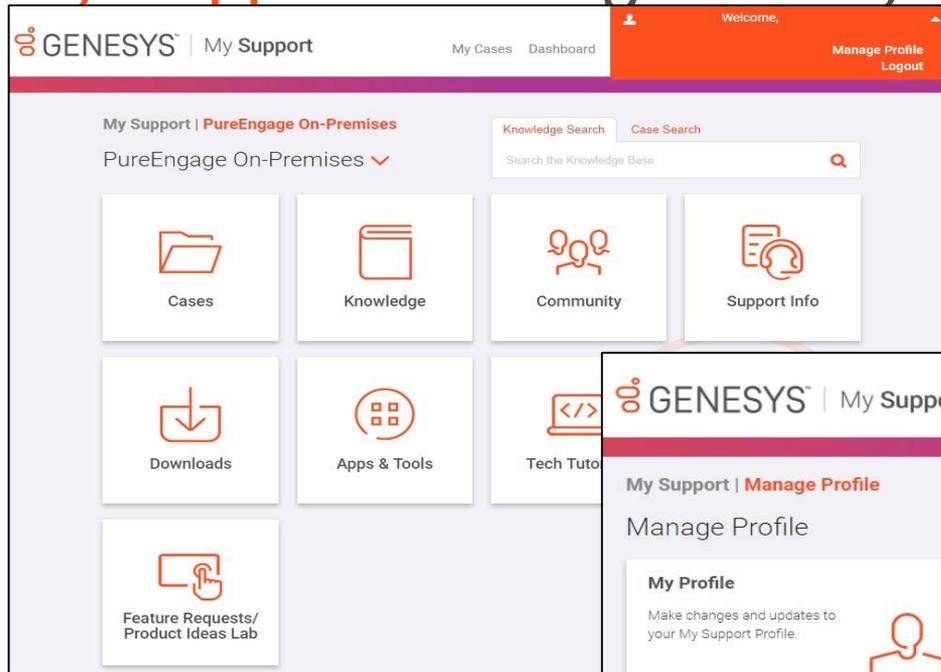
Select 'Manage Profile'

Select 'My Support Access' to view and update your Support Access

My Support: Viewing Your My Support Access

My Support Access displays the access levels for <u>all users</u> at your organization

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My Support: Opening an Admin Case
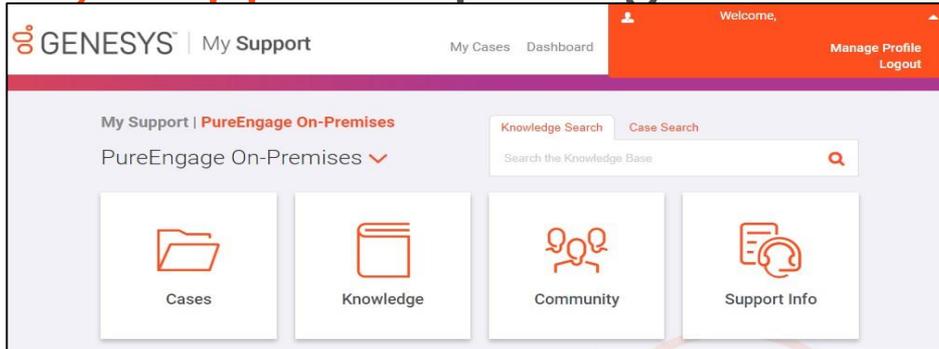
Select 'Manage Profile'
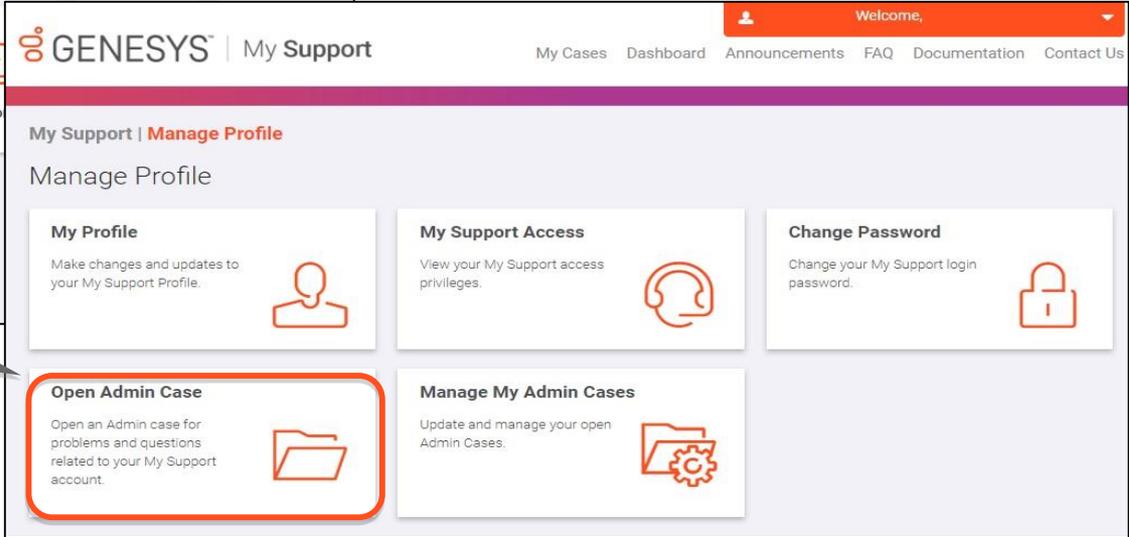
Select 'Open Admin Case' for questions and issues you are experiencing with My Support.

My Support: Opening an Admin Case

Select 'Open Admin Case' for questions and issues related to My Support problems and requests

As a reminder, Open a Support Case for problems with your Genesys products, Genesys Care tools, or PS custom applications.

New Admin Case

Subject	
Description	
Business Impact	
Priority	4-Low
Case Sub Type	--None--
	Question
	Request: Create New My Support Account
Date Needed	Request: Add/Remove Support Access
	Request: Change User Profile
	Request: CC Tools License
Date Justification	Problem: Support Access
	Problem: Other
	Log File Retrieval Service

Select the problem or question you are experiencing with My Support.

Save   Cancel

Case Escalation

If you are dissatisfied with the handling of your Case:

◦ Please know your assigned Case Number.

◦ Send an email to CCManagementAttention@genesys.com

◦ For Critical issues requiring immediate attention (such as production-down situations), call Customer Care to ask that an open Case be given Critical priority.

◦ Genesys recommends that you do not escalate issues through any other contacts that you may have in the company.

Appendix

Support Case Priority, Status, and Process

Case Priority Level Criteria

PRODUCTION DOWN	Causes a critical impact to business operations in a live production environment
CRITICAL	Causes a critical degradation to Business operations to the production or pre-production environment or major business application
HIGH	Causes a non-critical, but significant impact in a production or development environment that affects a production roll-out or service levels
MEDIUM	Causes a minor impact in a production or development environment
LOW	Causes little or no impact in a production or development environment

The assigned severity level for a problem may be mutually re-determined by both parties during the problem resolution process, but Genesys shall have the final authority as to the actual designation.

Definitions for Case Handling

Terms used in the following support target tables:

◦ **Response Target** is the initial response to Customer after the Case has been submitted.

◦ **Restoration Target** is the time in which a script, configuration change, procedure (such as reboot), or other action is provided by Genesys to generally restore the system to operation. Restoration Targets may not neutralize the root cause of the problem, but are designed to minimize Customer downtime.

◦ **Resolution Target** is the elapsed time between when a Case is logged and when Genesys provides a permanent or temporary correction that is accepted by the Customer.

Case Handling Process

Case Opened
- Designated Contact submits a Case through My Support
- New Cases can also be opened via telephone, but recommend starting with online submissions unless the Case is critical
- **Please do not email Customer Care to open a new Case**

Case Routing
- **Case number is provided for tracking purposes and must be provided when communicating with Customer Care**
- Case is routed to one of five product groups, if there are no additional questions

Case Assessment
- Case is assessed for completeness, complexity, and criticality
- Genesys Customer Care asks Designated Contact for more info, if needed
- Designated Contact provides more info
- Case is routed to appropriate Customer Care product expert

Case Management
- Customer Care product expert does research and proposes solution to Designated Contact
- Designated Contact reviews solution

Case Closure
- Designated Contact confirms that proposed solution resolves the issue
- Customer Care completes root cause analysis and updates Knowledge Base
- If appropriate, the issue is logged for future hot fix

Automated Follow-Ups

Case is Open	Auto Follow-Up #1	Auto Follow-Up #2	Auto Follow-Up #3
Customer Care is: 1- waiting for info 2- has proposed a solution	If there is no response after 2 business days, an email is sent to the Designated Contact	If there is no response after 5 business days, an email is sent to the Designated Contact	If there is no response after 10 business days, an email is sent to the Designated Contact and the Case is Closed. Case info is saved for 30 days and cannot be reopened after that time

o Applies to all Cases.

o Helps our Designated Contacts manage open Cases awaiting additional information so that Genesys Customer Care can speed the time to issue resolution.

Visit www.genesys.com or call +1.855.821.0932 for more information

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