



CSI SOFTWARE SUPPORT GUIDE



MANAGEMENT MADE SIMPLE.



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WELCOME

**TO THE CSI SOFTWARE SUPPORT GUIDE.
THIS DOCUMENT DESCRIBES THE SUPPORT
SERVICES PROVIDED BY CSI SOFTWARE AND
EXPLAINS HOW TO USE THEM.**



THE CSI SOFTWARE COMMITMENT TO SUPPORT

Management software is a world of constant change. Technologies change, users' expectations change, demands on business change. Your challenge is to find new and better ways to manage those changes and keep costs down. Your success depends on how effectively you can put your software technology to use.

At CSI Software we understand what you're up against, and we know the importance of being there when you need us. That is why we put as much effort into software support as we do software development. Sharing new information, being responsive to change, and working through problems and solutions together are part of our service responsibility in providing a reliable, comprehensive support program.

THE STRENGTH OF CSI SOFTWARE SUPPORT

We don't take the "*one size fits all*" approach to support. Instead, we have developed a variety of services that respond to the diverse requirements of customers. Our tiered support options provide maximum flexibility based on our customers particular business needs. Each package corresponds to user and project life cycle requirements. And because support requirements change over the software life cycle, you can change to a different plan when the time is right.

CSI Software combines state-of-the-art technology and a highly skilled team to deliver world-class support through a sophisticated infrastructure. Our Houston-based support center delivers support services using a variety of media, including the Internet and telephone. The CSI Software Support On-Line site includes services that allow you to find the information you need to resolve problems right away – and it is available 24 hours a day, 365 days a year. Our support analysts have access to a global customer support database, which allows them to share the most up-to-date technical information and customer history, and helps them provide fast, consistent responses to customer concerns.





FORWARD
THROUGH
CROSSING

CSI SOFTWARE SUPPORT PLANS



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SUPPORT PLANS BUILT FOR YOU

CSI Software constantly reviews its support plans to ensure that we can meet the present and future needs of our customers. We offer two distinct plans – our Standard Support and our Premium Support.

Each CSI Software customer has different support requirements. If you operate a multi-purpose facility, or if you have multi-site facilities, and you are deploying our software on a large scale, you may want to consider our more comprehensive coverage.

Choose the level of support that best responds to your needs today – and change it as your needs change so you always have a perfect fit. The following support plans are described in more detail





STANDARD SUPPORT

Standard Support offers a range of support services and includes the investment protection value of new releases of CSI Software. Standard Support is a comprehensive package designed to meet the needs of the majority of customers. The major components include all updates, access to our customer login and telephone support during normal business hours. Consult the table below for a complete list of Standard Support components.

COMPONENT

New Software Releases
Maintenance Releases
Patches
On-Line Support
Documentation
User Group Meetings
Support Newsletters
Unlimited Telephone Support 7:00AM to
7:00PM CST, Monday to Friday

Knowledge Bases
FAQs
Case Central
User Forums
Feedback
Account Management
Account Review Sessions
Web Seminars
eLearning Library

CSI SOFTWARE



PREMIUM SUPPORT

CSI Software's highest level of support is the Premium Support plan. It provides all of the features found in Standard Support plus telephone support 24 hours a day, 365 days a year. Consult the table below for a complete list of Premium Support components.

COMPONENT

New Software Releases
Maintenance Releases
Patches
Product Enhancement Program
On-Line Support
Documentation
User Group Meetings
Support Newsletters
Unlimited Telephone Support 24 Hours a
Day, 365 Days a Year

Knowledge Bases
FAQs
Case Central
User Forums
Feedback
Account Management
Account Review Sessions
Web Seminars
eLearning Library

SUPPORT COMPONENTS

At CSI Software, our support organization is here to help when you need us, whether you have a high-priority issue or a question about how to take advantage of production functionality. However, truly world-class support must provide more than assistance in times of need – it must provide an integrated package of information and services designed to help you maximize the software investment you have made. With that purpose in mind, CSI Software is built around a broad range of support components to help you achieve the return on investment that you have been seeking. This section details the components we provide.

NEW SOFTWARE RELEASES

CSI Software's development team is constantly working to improve the capabilities and performance of our software. **New Releases** are signified by a change in the integer part of the version number (*e.g. version 8.0 to 9.0*). They are shipped to all supported customers in a general release and are also made available for download from CSI Software Support On-Line site. These releases contain major feature enhancements including new functions, technology and performance enhancements.

Software revisions are minor-feature New Releases and are signified by a change in the decimal part of the version number (*e.g. version 8.0 to 8.1*). These releases – which might contain new functions, fixes or enhancements – are shipped to customers who request them and who have the appropriate level of support. They are also available for download on the Support On-Line site.

If documentation is updated, it is shipped with New Releases. Like software releases, documentation can be downloaded from the Support On-Line site. These documents detail new features and enhancements, and incorporate feedback received from users.





MAINTENANCE RELEASES

Maintenance Releases are also known as updates and are available for download from the Support On-Line site. This type of release addresses problems with the software that have been reported by customers or uncovered through CSI Software's own investigations. Releases are available to supported customers at scheduled intervals each year. During any interval, a number of changes might be incorporated into the software.

Maintenance Releases are normally sent only to customers who have encountered one of the problems fixed by the release.

If a serious problem is identified, CSI Software will send the Maintenance Release to all customers with the supported software.

PATCHES

In some situations, software **Patches** are sent to customers who require an immediate fix before the next scheduled Maintenance Release.

UNLIMITED TELEPHONE SUPPORT AND CASE LOGGING

If a technical issue arises that you need help with, you can log a case with CSI Software support. You are not limited by the number of people in your organization or the number of times you can contact support. Standard support hours are Monday to Friday, 7:00AM to 7:00PM CST.

ON-LINE SUPPORT

Through CSI Software's customer login, you can access numerous online technical support resources. These include latest news, the knowledge database, FAQs, case central, downloads, user forums, support newsletters and documentation.

Updated product documentation is provided with each new release. The documentation details new features and enhancements and may also have been updated based on user feedback. Documentation can also be downloaded from our Support Website at <http://www.csisoftwareusa.com/support/index.php>

USER GROUP MEETINGS

CSI Software is committed to providing our customers with very best software, support and service. In order to organize your input, we conduct **User Group Meetings** at all major industry events. These meetings are a valuable opportunity to provide feedback to CSI Software on software and support, learn about new enhancements and products and meet other CSI Software users.

SUPPORT NEWSLETTERS

The CSI Software eNewsletter is free to all support customers and contains technical and product information designed to enable our customers to work more effectively with CSI Software.

KNOWLEDGE BASE

The extensive text-based Knowledge Base provides easily accessible solutions to technical questions. An advanced search engine enables users to rapidly search an entire Knowledge Base and our documentation libraries.

FAQs

Find answers to the questions most frequently asked by our customers.

CASE CENTRAL

Manage your support cases on-line. You can add notes to existing cases, review cases for your organization and create new cases.

USER FORUMS

The CSI Software User Forums are intended to provide you with a place to discuss our software. We encourage you to ask questions and share knowledge about technical details and techniques for accomplishing tasks. Feel free to open any discussion on any CSI Software product-related subject you like.

FEEDBACK

We welcome your feedback on every aspect of CSI Software's Support Services – consulting, training or support. You can also give us your thoughts on related topics such as product enhancements.

ACCOUNT MANAGEMENT

We assign a dedicated representative to manage your account. Account Managers work as liaisons between their respective customers, and support, development and sales.



ACCOUNT REVIEW SESSIONS

Every quarter we hold a conference call in which the Account Manager, together with representatives from Support and Sales, review all issues reported by the customer.

WEB SEMINARS

We offer interactive, instructor-led, on-line training seminars. Customers can converse with peers and ask questions.

eLEARNING LIBRARY

The eLearning Library is a (self-paced) collection of online software lessons that take you step-by-step through key concepts and tasks in CSI Software. Take lessons whenever you need them, at your own pace! Since they are online, lessons are always available.

PREMIUM SUPPORT COMPONENTS

The support components discussed in the previous section are included in both the Standard and Premium support plans. The components detailed in this section are available only to Premium support customers.

UNLIMITED TELEPHONE AND INTERNET SUPPORT

If you require support during a time our regular Support Center is closed, such as on the weekend, extended coverage service is available. With this service, customers can request the help of a support technician after business hours, 24 hours a day, 365 days a year.





CRISTOFORAWANT

OUR APPROACH TO YOUR CASE

If you encounter a technical problem that you are unable to resolve, the CSI Software Technical Support Organization is here to help. Using the Web or calling us by phone, you can log a case about a problem. Our Support department will then begin working to resolve the issue for you. The following section details the different stages in the evolution of a case and CSI Software's approach for handling each particular stage.

BEFORE LOGGING A CASE

Getting support is as easy as logging a case. There are a few things to know before doing this. These guidelines will help you make the most effective use of Support – and help CSI Software resolve your problem in the fastest way possible.

If something isn't working the way you expect, your first course of action should be to explore the problem before contacting CSI Software Support. To explore the problem, follow each of these steps:

1. Verify that the problem is related to CSI Software (*i.e., the problem results in a CSI Software error message*). The problem could be with your database, hardware or network software, in which case you will to contact another vendor. If necessary, CSI Software will work with you and the other vendor to track down the problem.
2. Attempt to reproduce the problem to ensure that is isn't just a simple error or misstep.
3. Determine if the problem occurs on one, more than one, or all of your workstations.
4. Determine if the problem occurs randomly or consistently.
5. If the problem is reproducible, check to see if any changes have recently taken place in your computing environment that might be responsible for the problem.
 - version of the product, database, operating system, network software, etc.
 - client or server components
 - Web server configuration
 - security settings
 - other

LOGGING A CASE

If you still haven't solved the problem, it's time to contact Support. Using either the phone or Internet, you can log a case with CSI Software Customer Support. Please be prepared to provide the following information:



- The phone number and email address where you can be reached
- The version of the software you are using
- The version of the operating system you are using
- Your network configuration and version, if applicable
- A description of what you were doing when the problem occurred
- The exact wording of any error messages that appear on the screen
- Any steps you have taken to attempt to solve the problem

When reporting a problem to CSI Software Support, you will be asked to provide detailed information about the issue you are encountering and the impact it is having on your systems.

If you don't have a CSI Software support agreement covering the software for which you are calling, you will be directed to a support renewal representative.

TICKET NUMBERING SYSTEM

Each request or question that comes into Customer Support by any medium (e.g. Web, telephone, email) is logged and assigned a "ticket" number. This unique identifier allows you and the support analyst to track the case until the problem is resolved. It's important to request and record this number for reference in the event you want to request an update on the status of a case. If you need to call Customer Support regarding an ongoing case, be prepared to provide the ticket number.

CSI SOFTWARE

WE LIKE TO HEAR FROM YOU



YOUR FEEDBACK

The services we offer and the enhancements we make to those services are based on the input and feedback received from you, our customer. Your satisfaction with the service we deliver is our number one objective, so your feedback is extremely valuable to us.

We count on your feedback to help us determine your level of satisfaction with the support services we offer and how well we deliver those services. The information we gather from your comments and surveys is used to determine how we can improve the quality of support and services we provide.

CASE-DRIVEN SATISFACTION SURVEYS

Your satisfaction and your opinion are both very important to us. That's why our Support organization surveys customers like you every day. We randomly conduct customer satisfaction surveys shortly after we have closed a case that you logged – while the events are still fresh in your mind. Our goal with these surveys is to evaluate your level of satisfaction and utilize this information to enhance the Support we deliver.

Questions range from the overall satisfaction with Customer Support to satisfaction with the response time and quality of the technical information provided by the support analyst.

The information gathered is compiled and analyzed on a continuous basis, and used to improve existing programs and develop new ones. The results of these surveys help Support Managers pinpoint and focus on areas where there is potential for performance improvements.

Please help us to provide consistent delivery of our support by taking a moment to respond to these surveys.





**CSI SOFTWARE'S
CONSULTING AND
TRAINING SERVICES**

CSI SOFTWARE

MAXIMIZING YOUR INVESTMENT

CSI Software's customer services are focused on a holistic approach that takes customers from novice to expert. Through our consulting and training services, customers have access to trusted advisors where they're needed most: planning project strategy and deployment, helping resolve technical issues, delivering upgrade assistance, planning and delivering training needs, or providing implementation assistance. Our services professionals will work with you to transfer knowledge while ensuring your CSI Software solution is quickly up and running and delivering fast returns on your investment.

CONSULTING SERVICES

No one has more experience than CSI Software in working with customers to get quick results from our software. We deliver consistent, professional consulting services around the world. Whether you need implementation assistance or an expert project manager, CSI Software consulting can get you where you need to be with the fastest time to results.

Your success is our success – and we've developed service packages that are designed to make sure you get the consulting and training services you require for the success of your CSI Software deployment. Our Consulting Services team has a broad range of experience – in project management, with industry-specific knowledge, and our consultants have an expert understanding of our technology.

CSI Software Service Packages are developed to address the common consulting needs of customers and to make it easy for you to understand the benefits we deliver. These services packages are built to meet commonly encountered needs, so you see a quantifiable ROI with CSI Software.

TRAINING SERVICES

Worldwide training in CSI Software is available through on-site training or over the Internet. Our training experts ensure success by transferring skills and knowledge to administrators and users of CSI Software products at every stage of deployment. As with our services, our training courses have one main objective: to provide your company with everything you need to succeed. All training courses are designed by experienced course developers and presented by accredited instructors.



www.csisoftwareusa.com

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