HOW-TO GUIDE

How to Use the *my proALPHA* Customer Portal

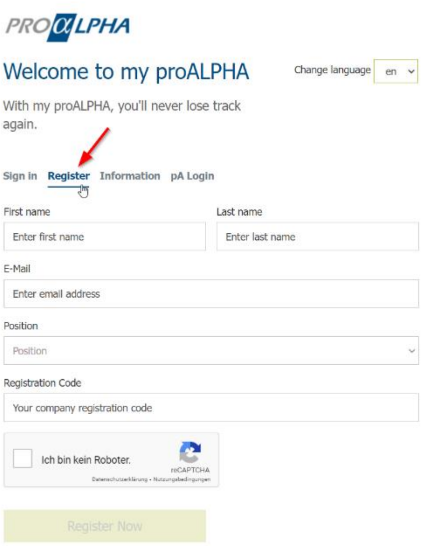
Table of Contents

1. Sign Up

How can I sign up?

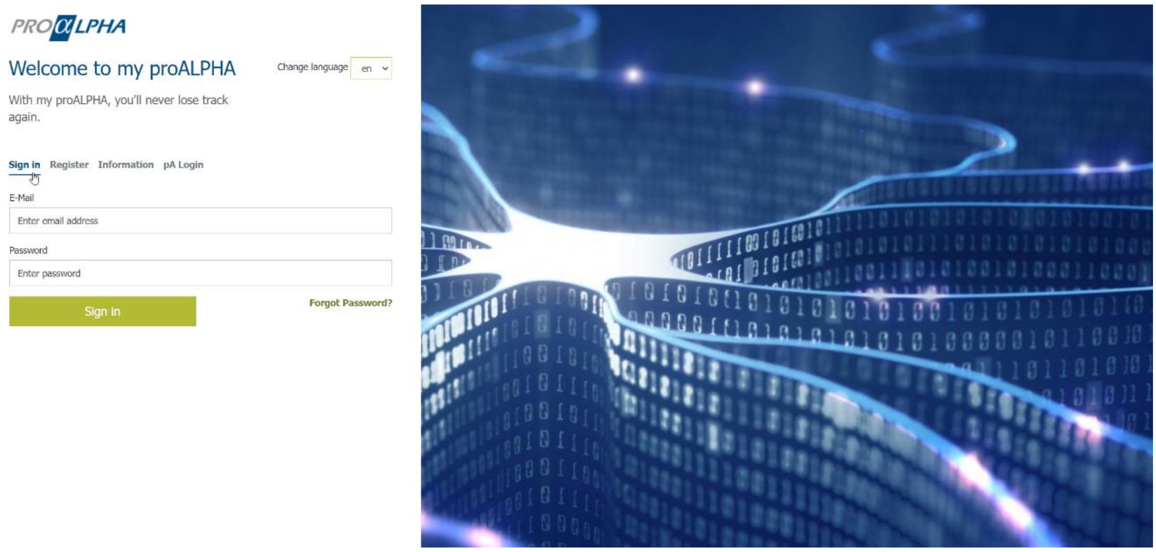
There are many ways to sign up.

- You sign up yourself: You'll then receive a registration code from your customer manager (usually the admin at your company), which you have to enter in the portal for authentication purposes.



Once your account has been approved by the customer manager (see also chapter 9: My Team / Invite and Manage Team Members), you'll receive an e-mail with a description that will guide you through setting up your personal account for *my proALPHA*. When you log in for the first time, please use the function 'Forgot Password' and specify a new one. **Your user name is your e-mail address.**

- Your customer manager has invited you: You'll receive an e-mail which guides you through the steps for setting up your personal account for *my proALPHA*. When you log in for the first time, please use the function 'Forgot Password' and specify a new one. Your user name is your e-mail address.
- An account has already been created for you: When you log in to my proALPHA for the first time, please use the function 'Forgot Password' and specify a new one. Your user name is your e-mail address.



Setting up multi-factor authentication

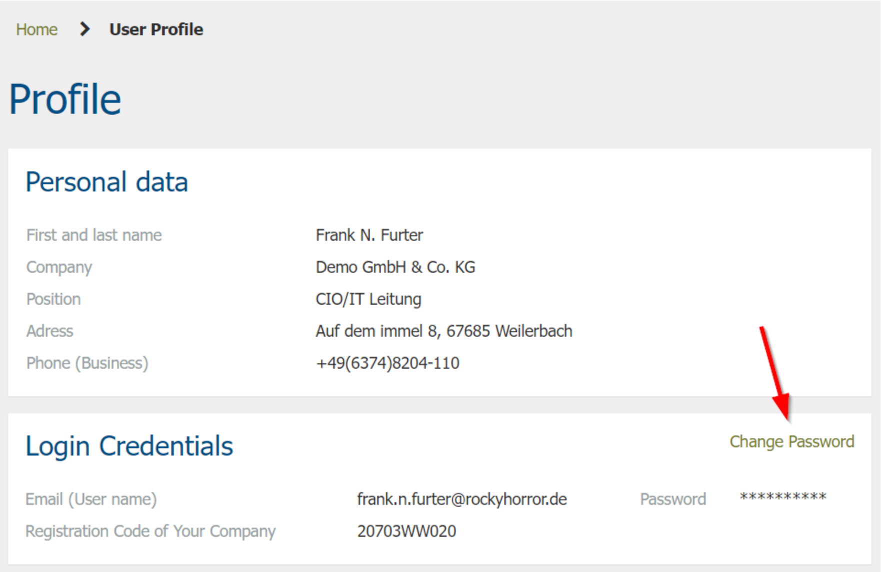
To increase the security of the portal, multi-factor authentication is necessary in the portal. The MFA is implemented using proven technologies that ensure a robust security architecture. With this measure, we want to protect the integrity of your accounts while minimizing the possibility of unauthorized access.

Log in to the portal. You must then verify your identity. You can do this either with an authentication app or a confirmation code by email. The following apps can be used:

- Google Authenticator
- Microsoft Authenticator
- LastPass Authenticator
- Auth
- FreeOTP
- Duo
- Okta Verify

Change password

You can change your password under "Profile".

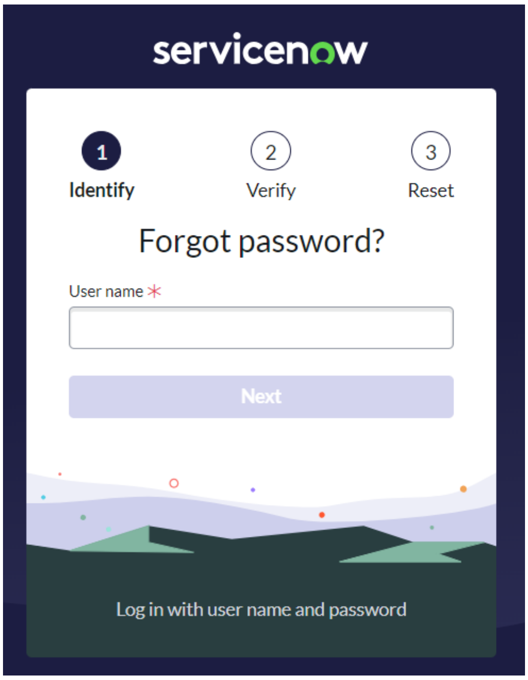


Assign a new password. You can then log into *my proALPHA* using your new password.

Tip: Use a strong password. It will protect you and your data.

Forgot your password?

Click on 'Forgot password?' and the following page opens:



Follow the instructions. **Your user name is your e-mail address.** You'll then receive an e-mail to the e-mail address specified in the second step.

- For security reasons, you can only reset your password every 24 hours.
- For more information about the user administration, go to Chapter 9.

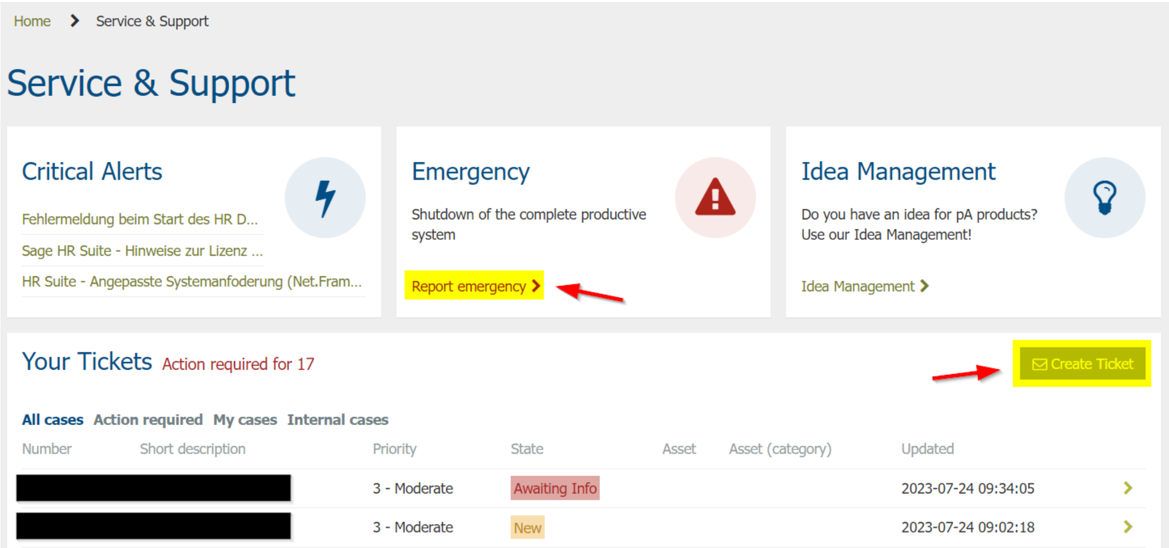
2. Ticket Process

Types of tickets

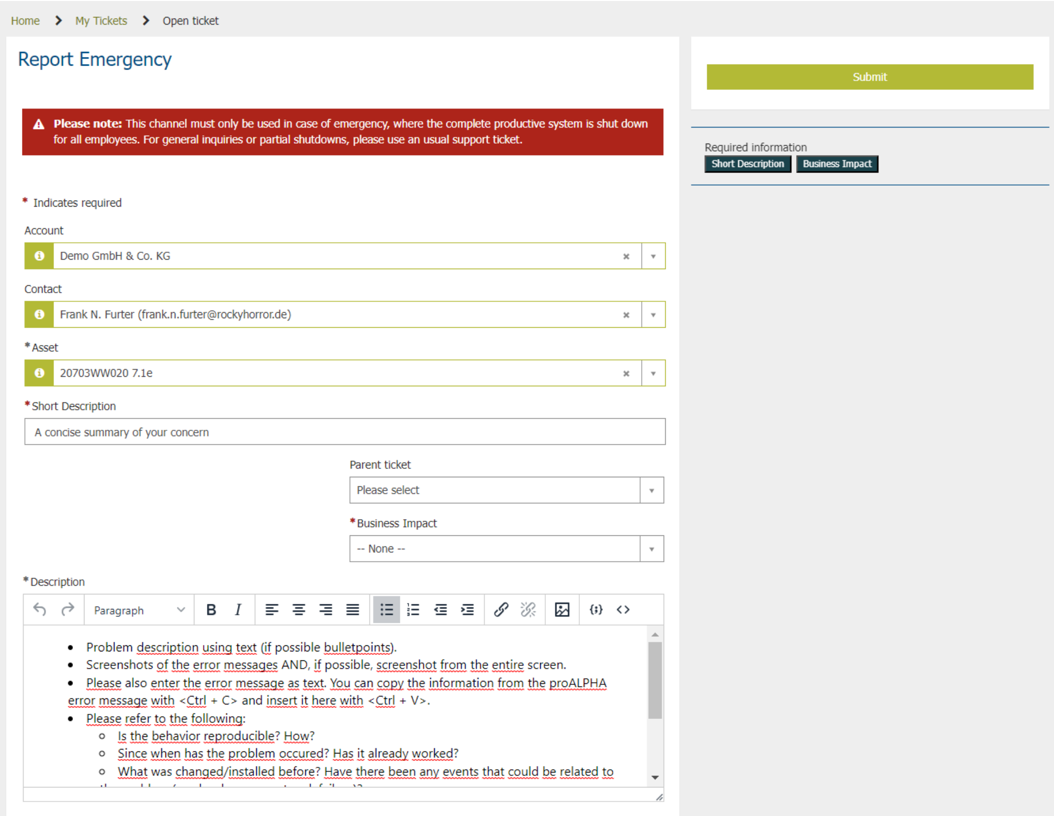
You can choose from two different types of tickets:

- **Report emergency**: Your system has broken down or you are facing similar severe problems? Then please open an emergency ticket.
- **Create Ticket:** Have you got a question about a certain topic or are you facing a problem? Then please use our regular support ticket.

You can find the link for creating a ticket in the 'Start Page' or 'Service & Support' menu.



Report emergency



Legend – what the fields in the mask mean:

- **Business Impact**: In what way does your problem impact your business? This information helps the Service Agent to categorize the emergencies.
- **Asset / Module**: The products / modules affected.
- **Priority**: "Medium" by default
- **Short Description**: Meaningful summary of your issue
- **Description**: Detailed description of the request (you can use the predefined keywords as orientation)
- **Environment** (optional): proALPHA environment Production / Test / Test2
- **Company** (optional): proALPHA company
- **Your Reference** (optional): In case you want to follow your request with your own reference number.

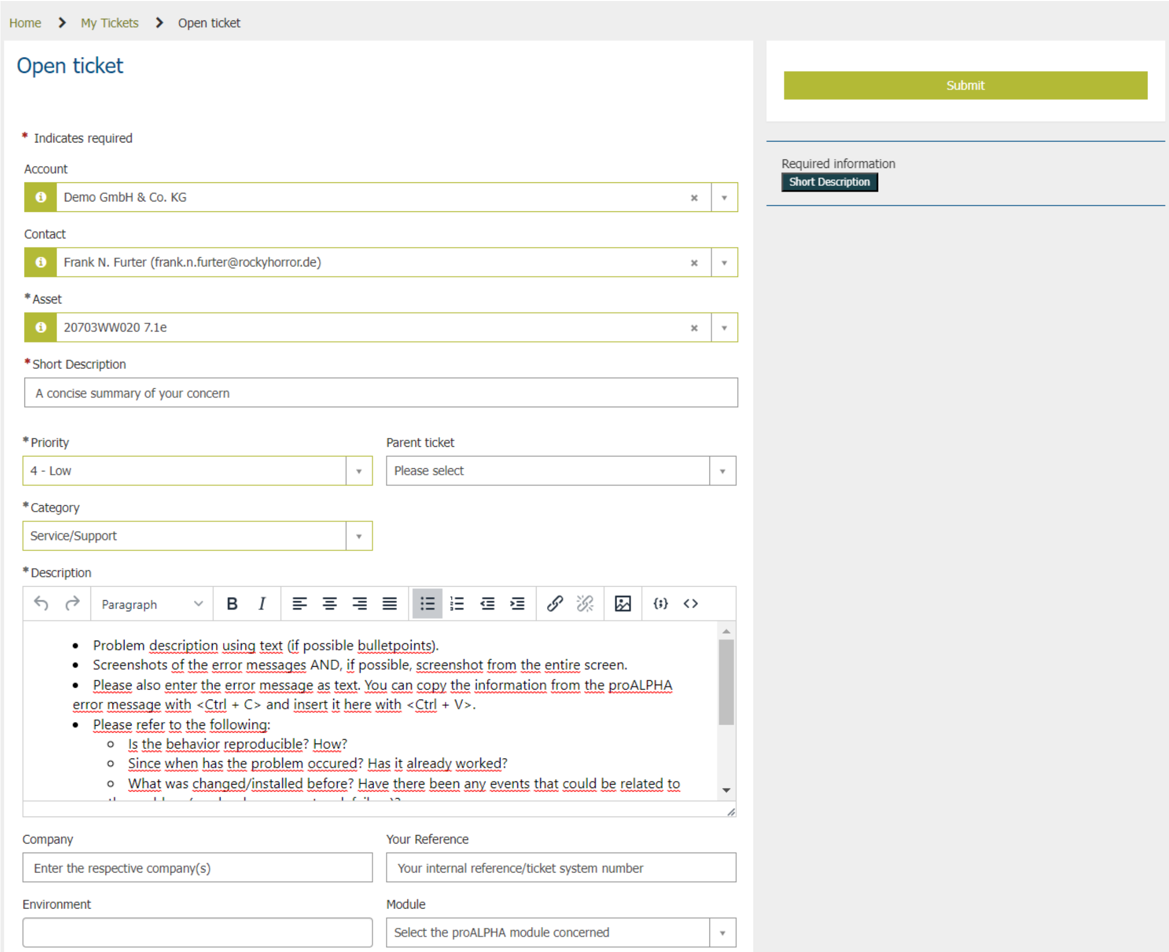
Did you know that we have recommendations on reporting problems? Click here:

Recommendations on reporting problems

Information about an error (example)

Provide information for the error analysis

Open a ticket



Legend – what the fields in the mask mean:

- **Asset / Module**: The products / modules affected
- **Category**:
  Service/Support: for questions and problems relating to the proALPHA Software
  Project: You're currently in the implementation phase of proALPHA or are preparing an upgrade to a later version and are therefore supported by a project team: you can use this category to report questions and problems that concern the project team.
  Other Services: Your questions and requests for Academy, Marketing, Consulting and Order Management.
- **Priority**: Priority / urgency of your request
- **Short Description**: Meaningful summary of your issue
- **Description**: Detailed description of the request (you can use the predefined keywords as orientation)
- **Environment** (optional): proALPHA environment Production / Test / Test2
- **Company** (optional): proALPHA company
- **Your Reference** (optional): Here you can add the ticket number from your internal ticketing system. This reference is added to the subject line of all e-mail notifications.

Did you know that we have recommendations on reporting problems? Click here:

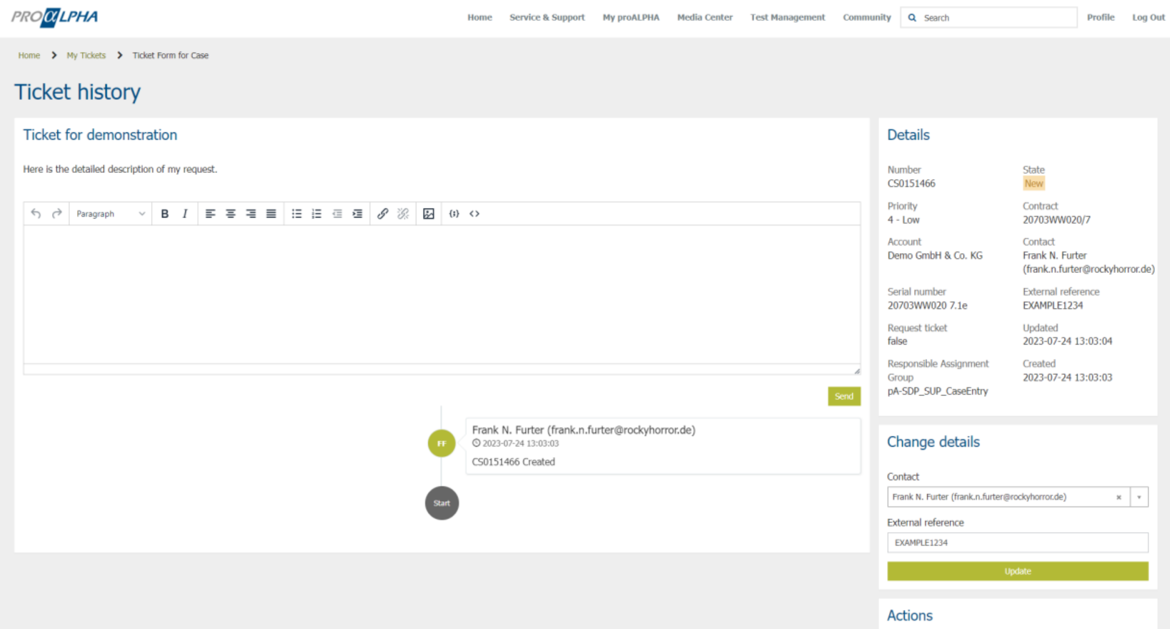
Recommendations on reporting problems

Information about an error (example)

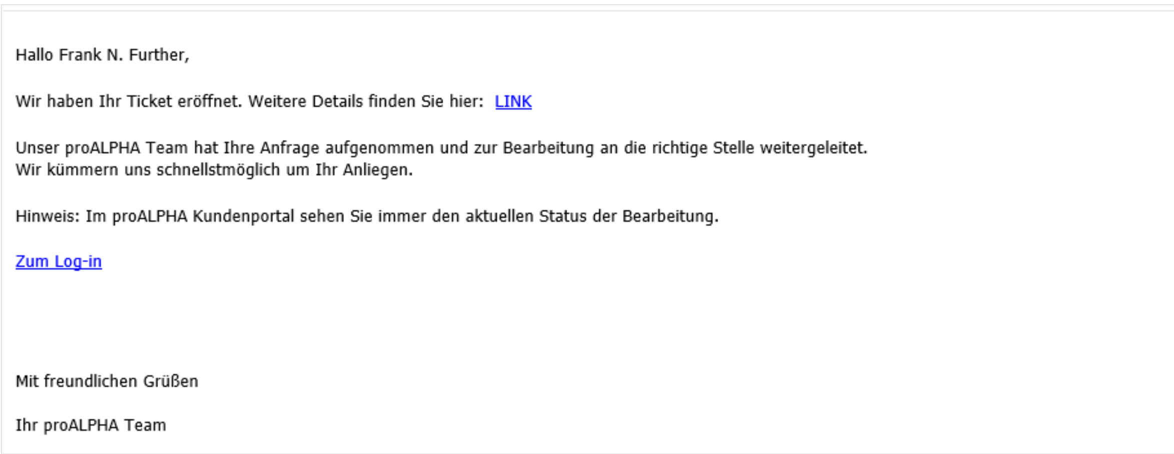
Provide information for the error analysis

Ticket history

You'll see the ticket information and ticket number as soon as you've submitted your request:



At the same time, you'll receive an e-mail confirmation:



Hallo Frank N. Further,

Wir haben Ihr Ticket eröffnet. Weitere Details finden Sie hier: LINK

Unser proALPHA Team hat Ihre Anfrage aufgenommen und zur Bearbeitung an die richtige Stelle weitergeleitet.
Wir kümmern uns schnellstmöglich um Ihr Anliegen.

Hinweis: Im proALPHA Kundenportal sehen Sie immer den aktuellen Status der Bearbeitung.

Zum Log-in

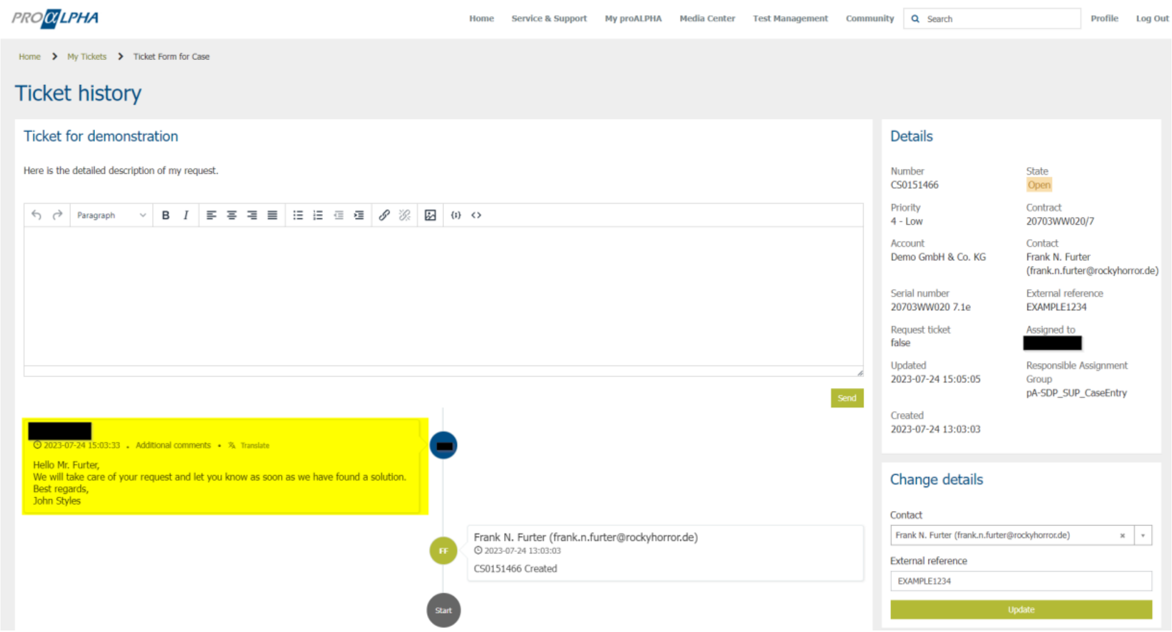
Mit freundlichen Grüßen

Ihr proALPHA Team

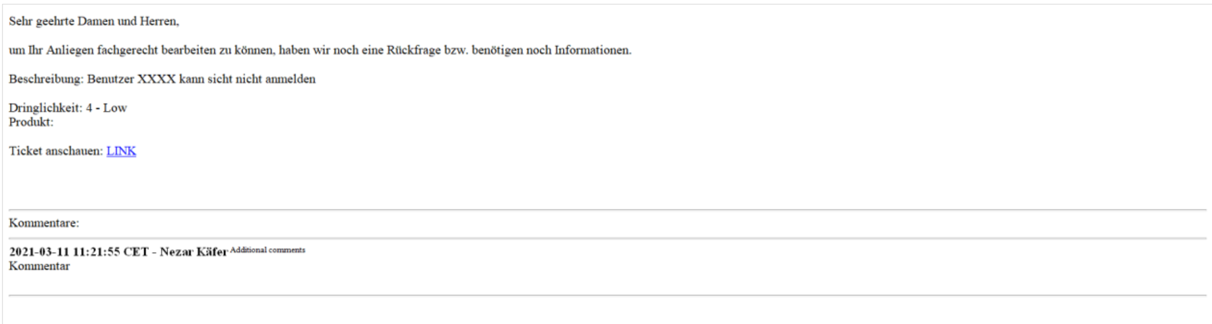
The link in the e-mail redirects you to your ticket in the customer portal.

Comment/question

When a comment/question is entered, it is immediately shown in the portal and at the same time sent by e-mail, too.



E-mail information



Sehr geehrte Damen und Herren,

um Ihr Anliegen fachgerecht bearbeiten zu können, haben wir noch eine Rückfrage bzw. benötigen noch Informationen.

Beschreibung: Benutzer XXXX kann sicht nicht anmelden

Dringlichkeit: 4 - Low
Produkt:

Ticket anschauen: LINK

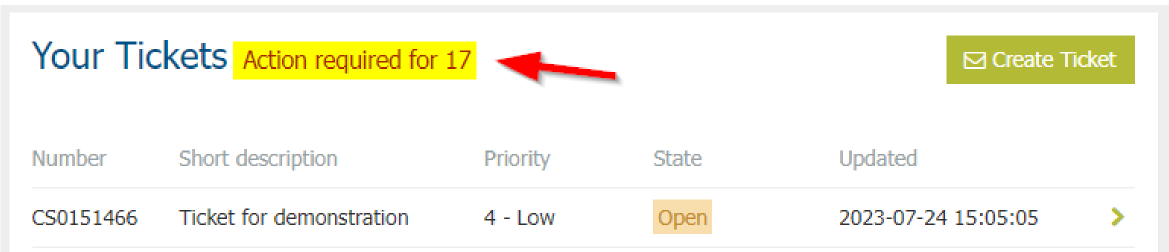
Kommentare:

2021-03-11 11:21:55 CET - Nezar Käfer Additional comments
Kommentar

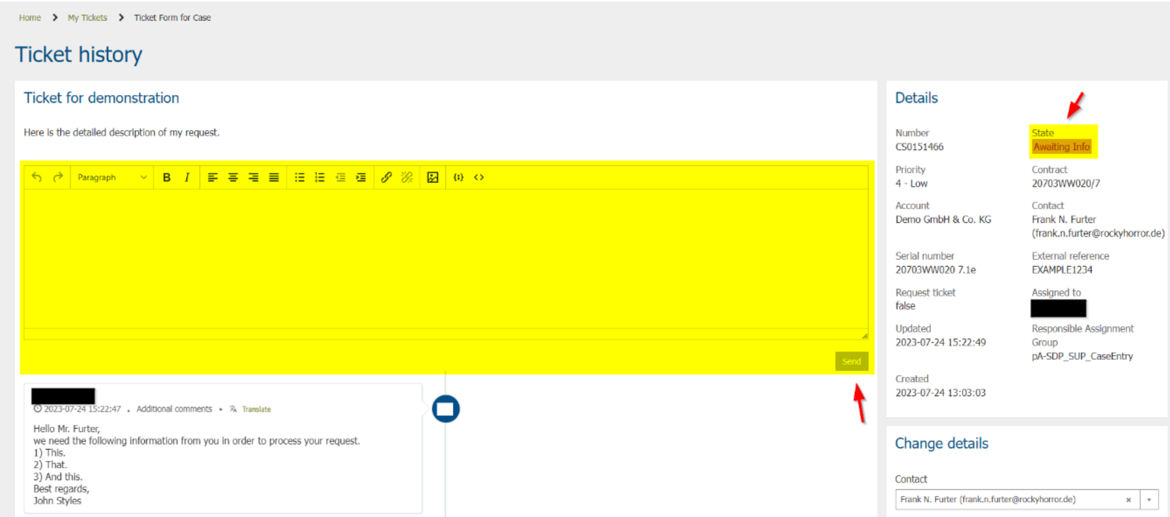
How can I see when my action is required?

In case you need to take action or provide information for the further processing of your ticket, the question is displayed in the portal and also sent to you by e-mail.

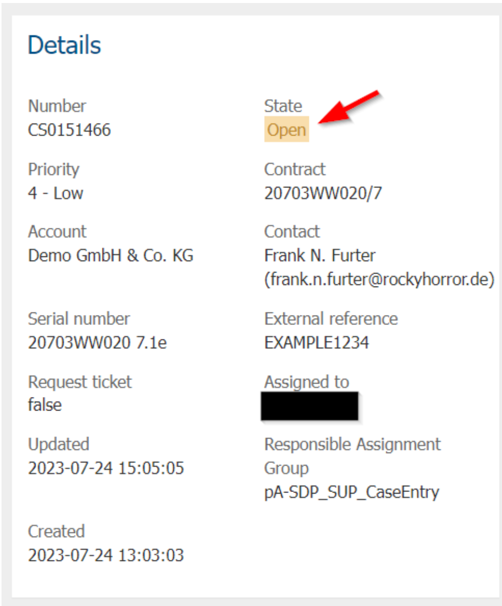
In the portal, you can find the question under the "Action Required for" link in the ticket overview.



In your ticket history, this looks as follows:

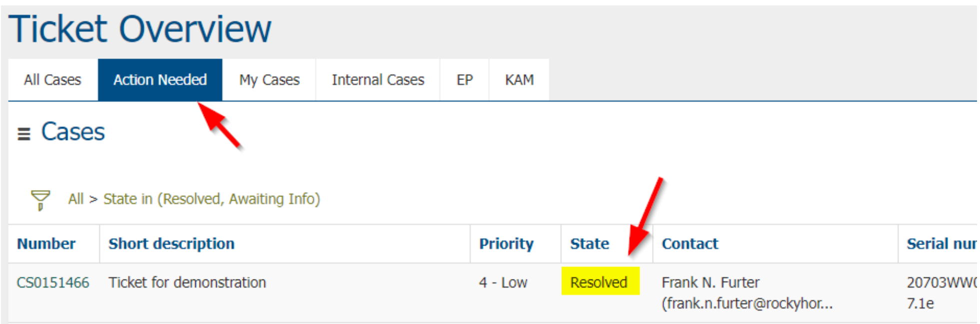


You can enter your answer directly in the portal and submit it. The ticket is then set to the status 'Open', and will be further processed by the Service Agent.



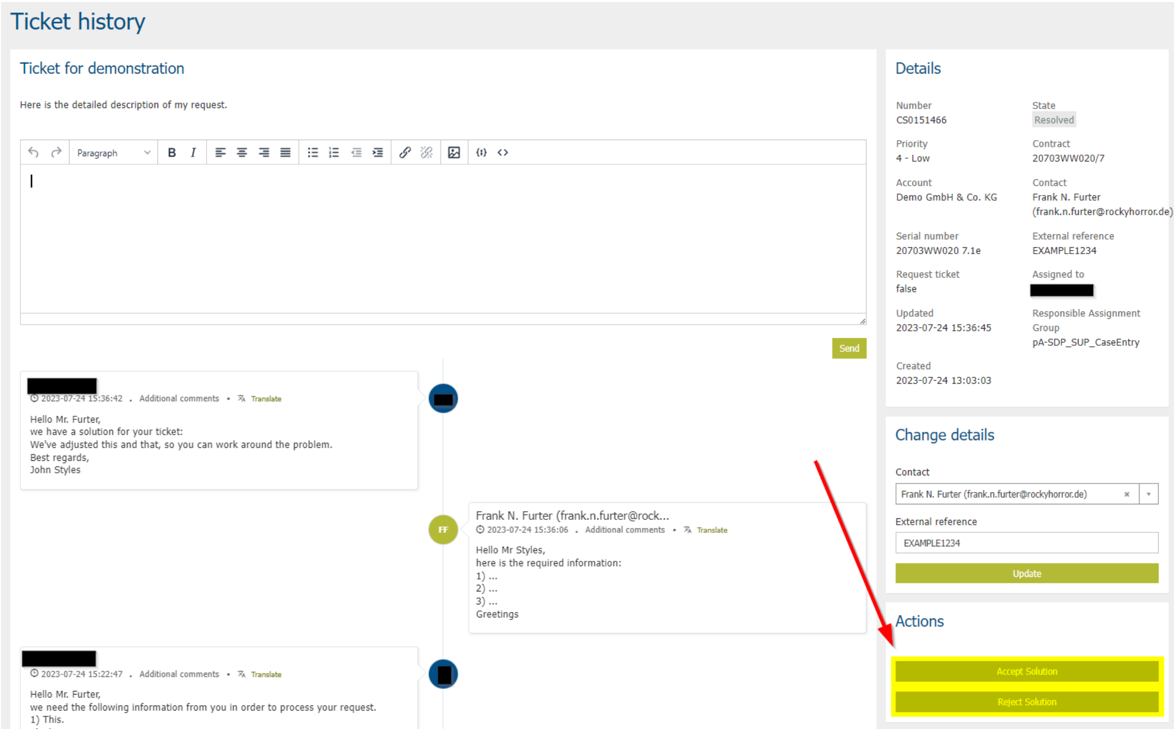
Proposed solution

As soon as a solution is available, it is displayed in the ticket overview and sent to you by e-mail.



In the portal, it is displayed with the status "Solved" in the ticket overview.

You can either accept or reject the proposed solution in the portal or via the link in the e-mail.



Reject proposed solution

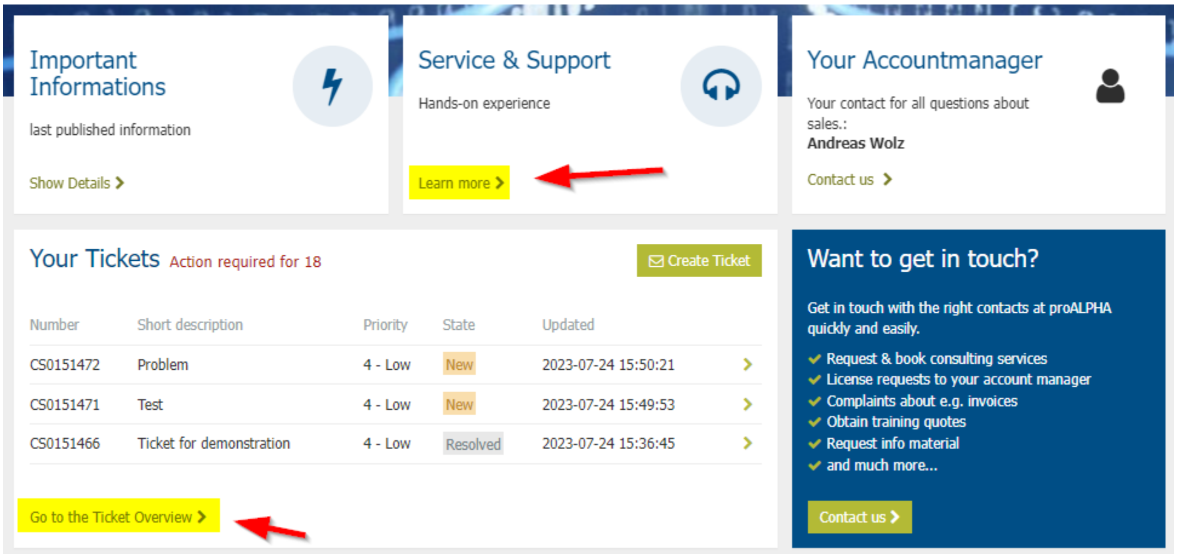
In case you do not agree with the proposed solution and click "Reject", the ticket will be reopened and further processed. Also add a detailed description in the corresponding field so that the service agent can respond. If you reject the proposed solution via e-mail, please also add a meaningful description.

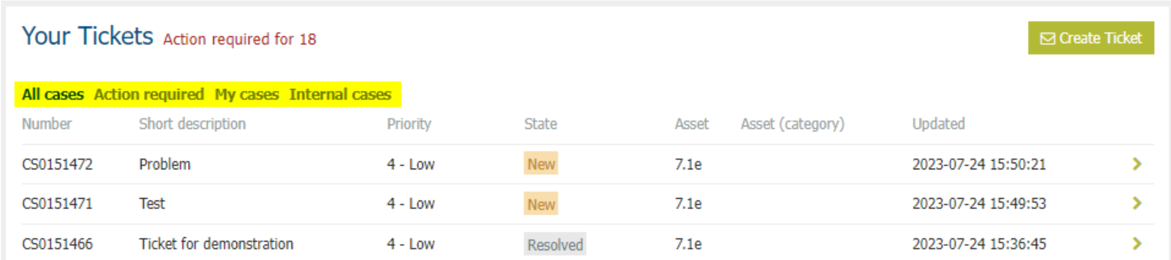
Accept proposed solution

If we have successfully solved your problem, the ticket will be closed. Once a ticket has been closed, it cannot be opened again.

Ticket overview

You're directed to an overview of the tickets by clicking either on 'Further Information' under the 'Service & Support' field or on 'Go to the Ticket Overview' in the 'Your Tickets' field. The ticket overview contains the tabs "All cases", "Action required", and "My cases".





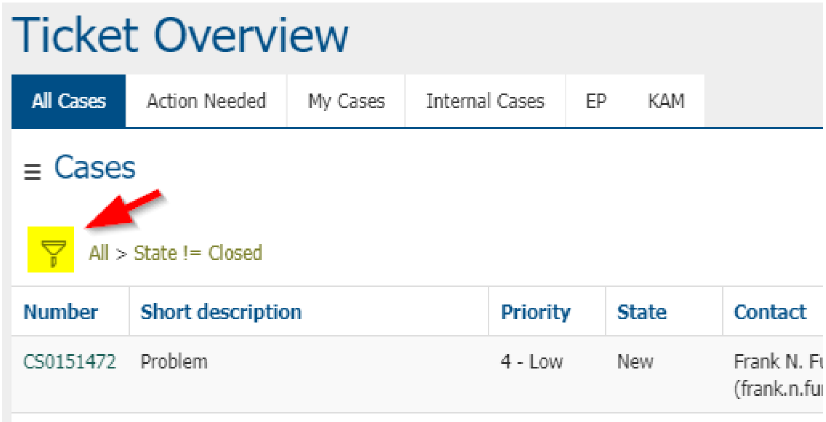
Legend – what the fields mean:

All cases:	All cases reported with this account. *(Note: This requires admin rights. Otherwise, only "My cases" will be displayed.)*
Action required:	All cases where your action as a customer is required. *(for example: answers, tests, confirmations...)*
My cases:	All cases the logged in user has reported. If a user only has user privileges, they only see their own tickets anyway. In this case, the link has no function.
Internal cases:	Here you can view the cases that are created during the use of test management or that you have created for your internal purposes. Contact your project team for more information.

Filter tickets individually

All tickets can be filtered individually in the ticket overview. To do so, click on 'Show Further Tickets':

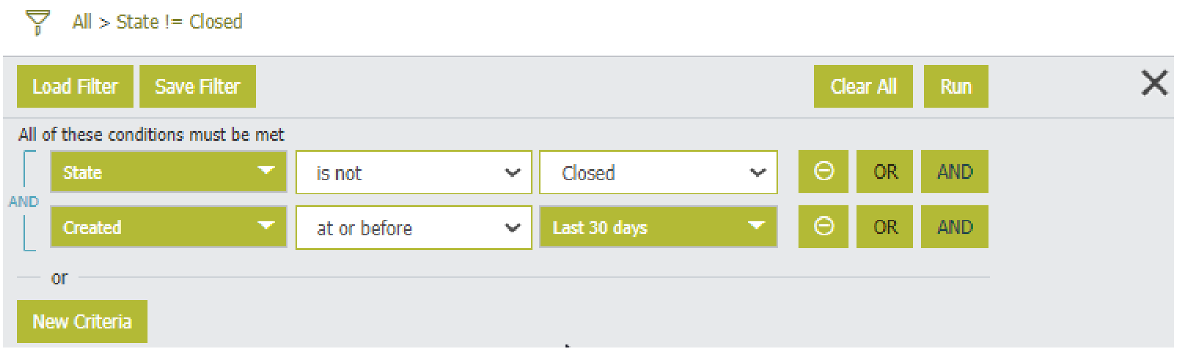
If you want to set a filter, click on the filter icon and enter the filter settings:



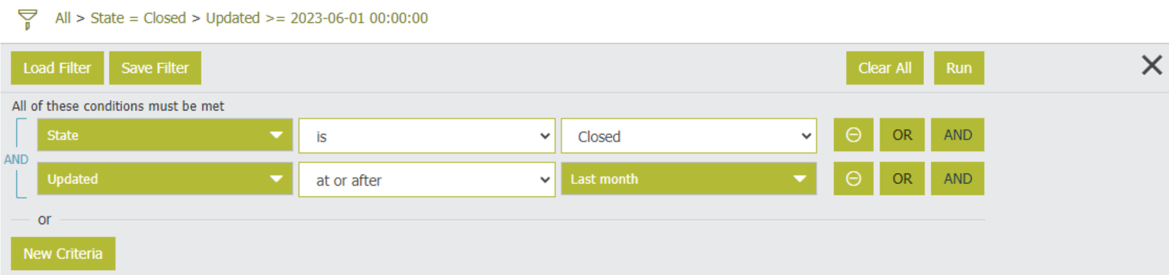
Examples for individual filters

Here are two examples for individual filters:

- Display tickets that have been opened more than 4 weeks ago:



- Display tickets that were closed last month:



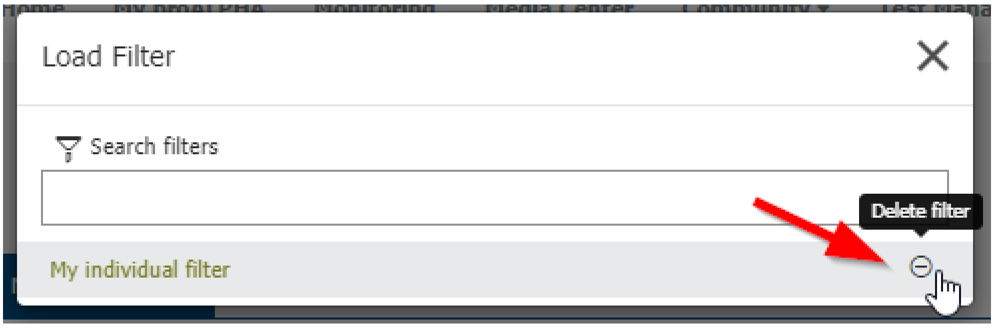
You can also save customized filters by clicking on 'Save Filter'. You then have to enter a filter name that describes the filter in short:

Your created filter will now be displayed in the ticket overview with the specified name. Select it to filter the tickets by the defined settings.

You can also export the list of tickets as a PDF, Excel or CSV file:

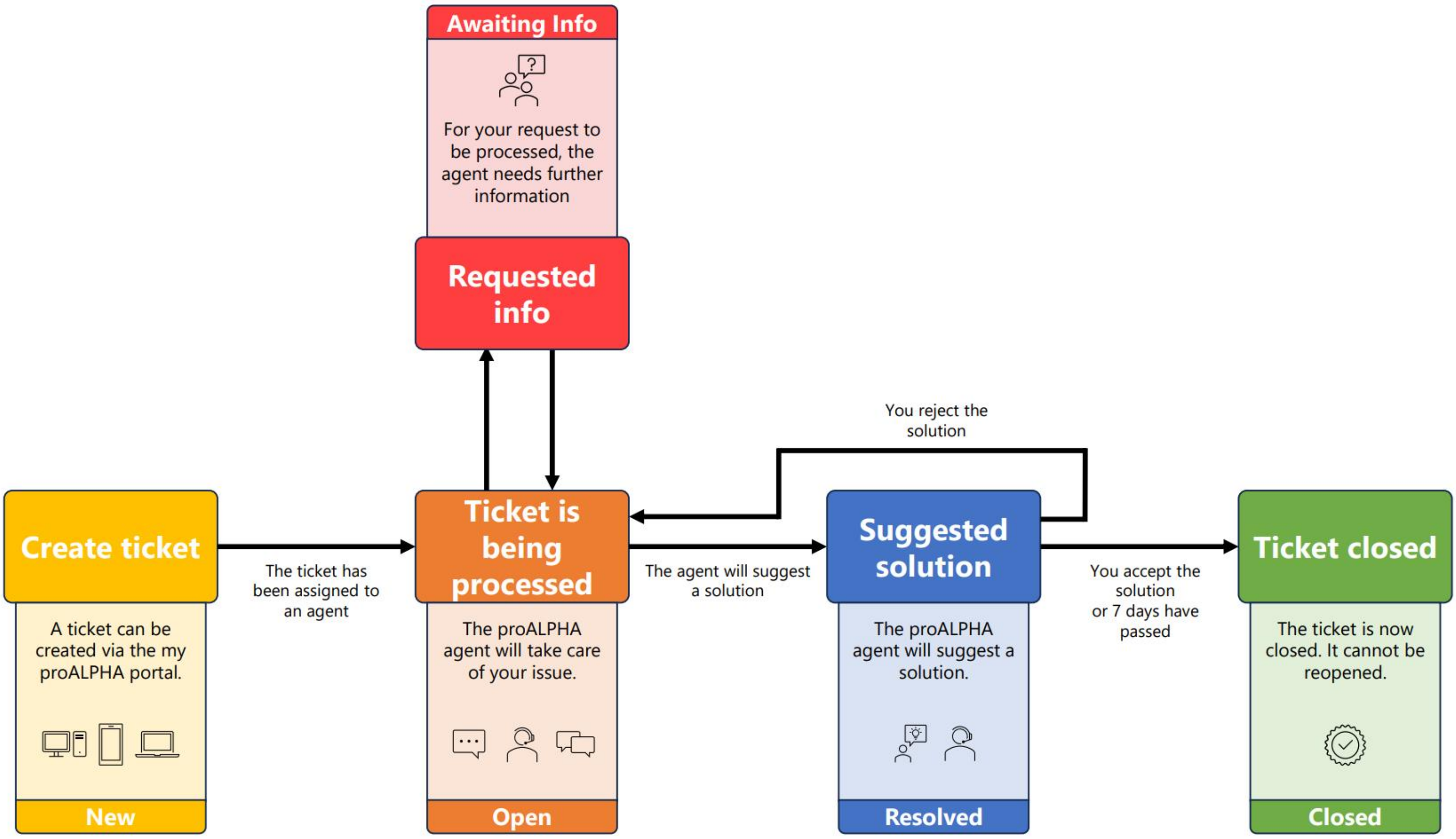
Delete individual filters

To remove individual filters, click on the filter symbol and then click “Load filter”. Here you can delete individual filters.



3. How is a ticket processed?

The following scheme shows you how a ticket is processed.



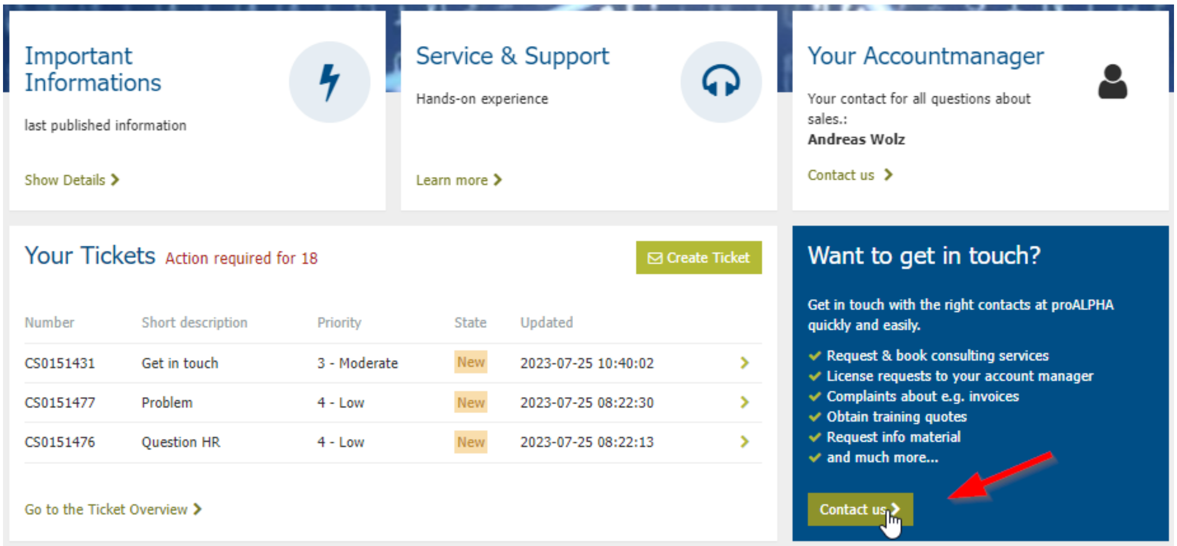
(Own scheme based on a picture by ServiceNow)

4. Contact

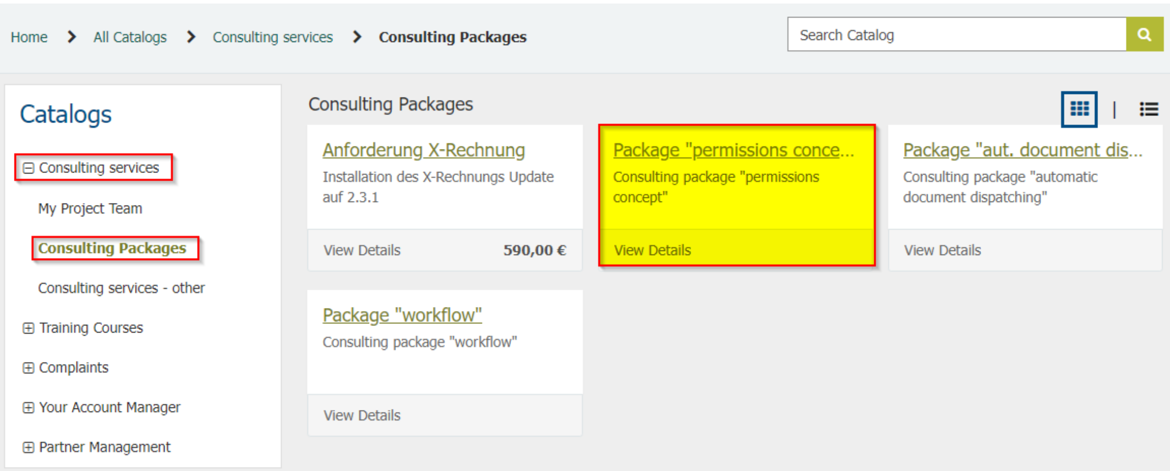
In general, we distinguish between tickets (incidents) and requests (service requests) in the portal.

For service requests, we have expanded the "Contact us" function so that you can quickly find the right contact person for your concerns.

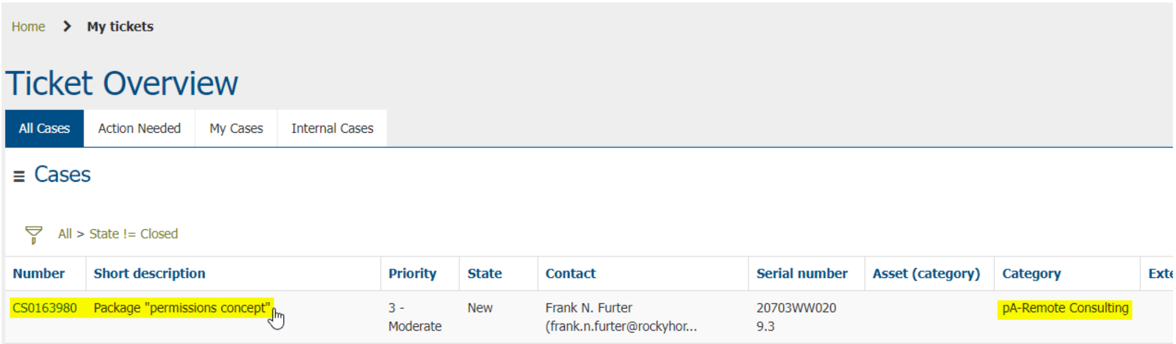
By means of the "Services" behind "Contact us" you can request consulting services, issue complaints regarding invoices or contact your account manager, for example. The available "Services" are continuously expanded.



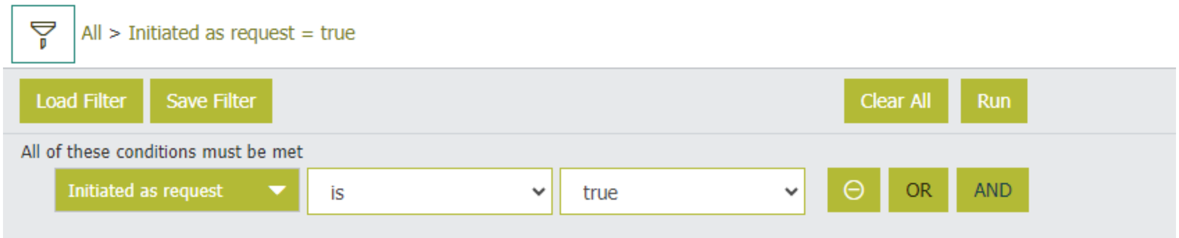
On the left, you can filter the 'Services' by catalogs and/or subcategories. The right side will adapt to this selection. For example, if you want to book a consulting package, click "Consulting Services|Consulting Packages" on the left. On the right, select the desired service from the "Services" offered.



The "Account" and "Contact" fields are automatically filled. You can enter your business phone number so that we can get in touch with you. All required fields are marked with an asterisk. After you have written your message, click on 'Submit' in the top right corner. A corresponding ticket is created, which you can view like all other tickets in the ticket overview.

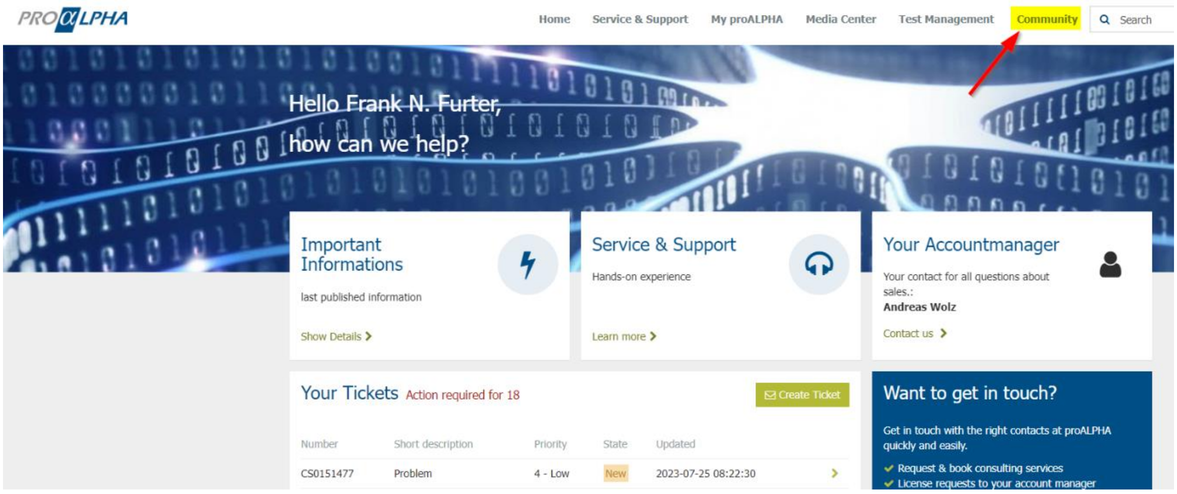


The ticket category is "pA-RemoteConsulting". If you only want to see tickets that have been created through a submission/request (service request), you can filter for the 'Initiated as request' field in the ticket overview using the filter option (see above):



5. Community

The ribbon takes you to the Community.



The Community is an online platform where you can exchange information with other proALPHA users and the proALPHA team on all topics related to proALPHA. You can ask and answer questions.

You can search for posts:

You can use the "Content List" to filter existing posts:

Related Forum: Here you can filter for the entries of a specific forum, or have the entries of all forums displayed

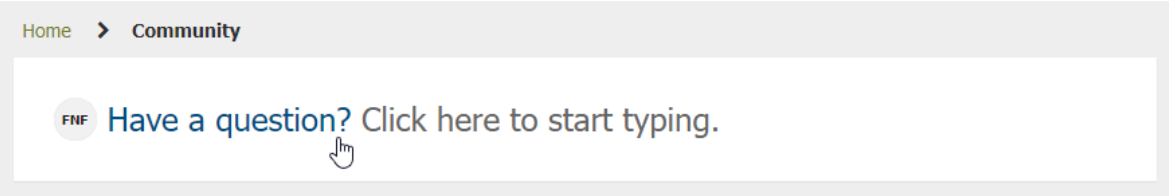
Content Type: Here you can filter for questions or blog entries, for example.

Sort by: "Recent" displays the most recent entries first, "Popular" displays entries with a particularly high number of views or interactions, "Created" sorts by the creation date

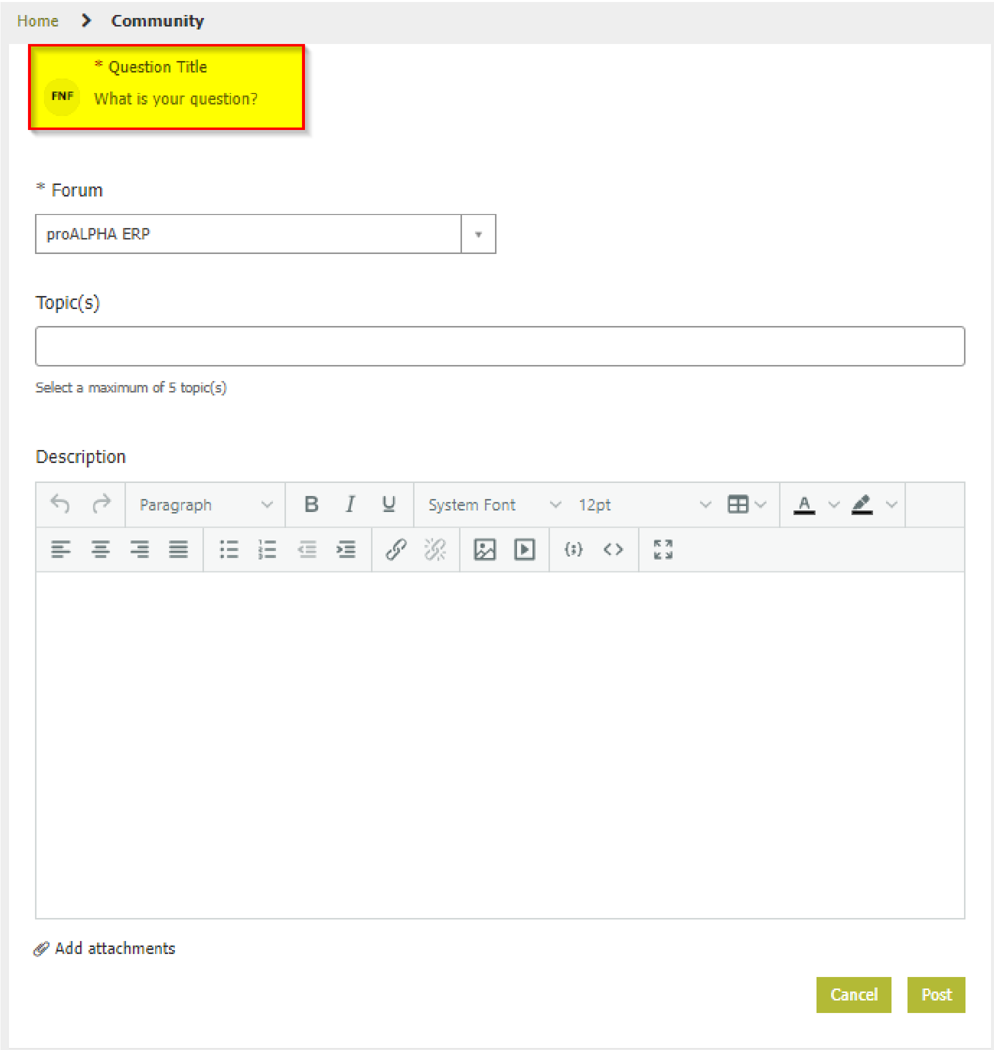
Question Status: If you search for questions (content type), you can further restrict the status of the entry, e.g., you can use "Solved" to display only questions that already have a verified answer.

Ask a question

Do you want to ask the proALPHA Community a question? Then click on the respective space under "Community":



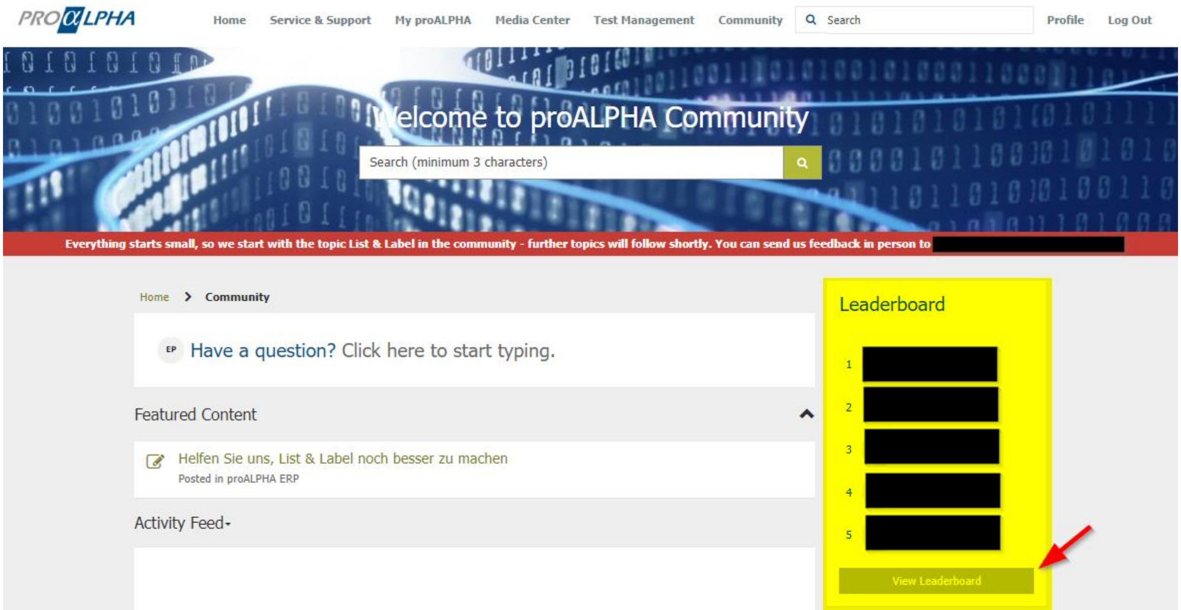
An input form is displayed:



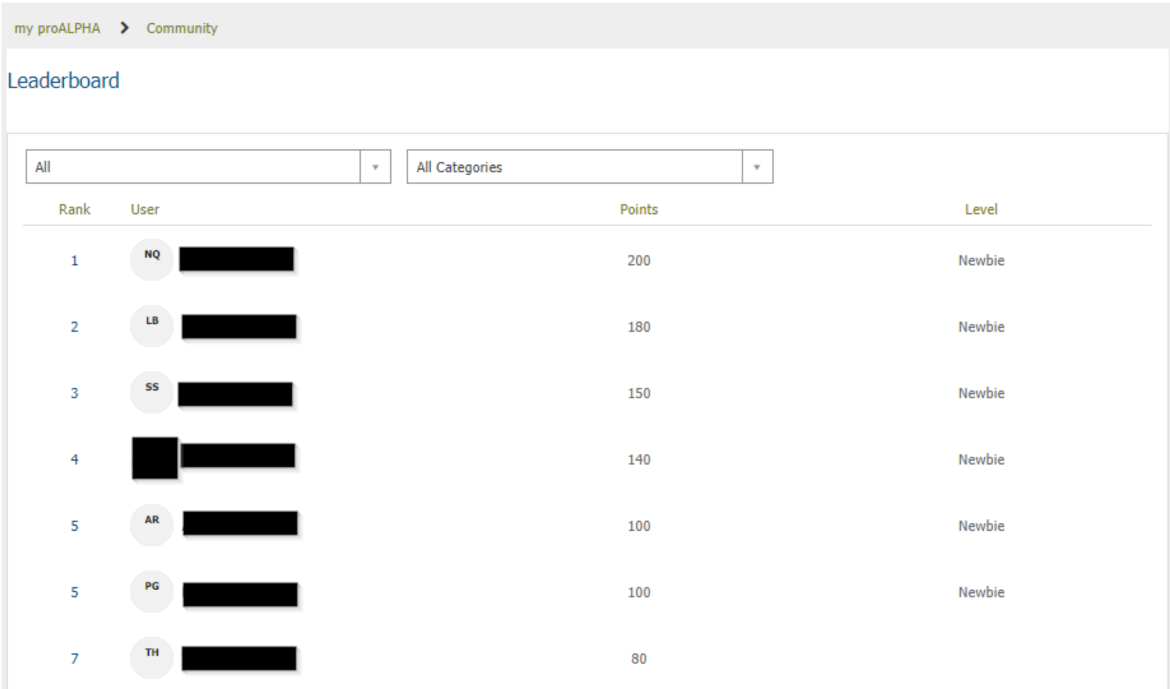
Question Title:	Here you can concisely summarize your question.
Topic(s):	Here you can enter the topic or topics to which the question belongs.
Description:	Here you can formulate the question in more detail and add further information.
Add attachments:	Here you can add attachments, such as PDF files or image files.

Leaderboard

Points are assigned for participating in the portal. A ranking displays the users with the highest score. By means of "Show Ranking", you can view the entire ranking:



In addition to the rank, you can view the exact score and the level, a kind of status.



Good to know!

proALPHA regularly rewards the employees in the Communities. It pays off to regularly participate in discussions of the Community!

Scoring system

You earn points for taking certain actions in the Community. These points are relevant to the forum, the topic or on a global level. The more points you earn, the higher your ranking.

Security badges: Your profile displays a badge as a trophy for completing a task in the Community. You can display the list of badges you have unlocked and still need to unlock in your profile.

Points: You earn the corresponding number of points each time you complete a task from the following list.

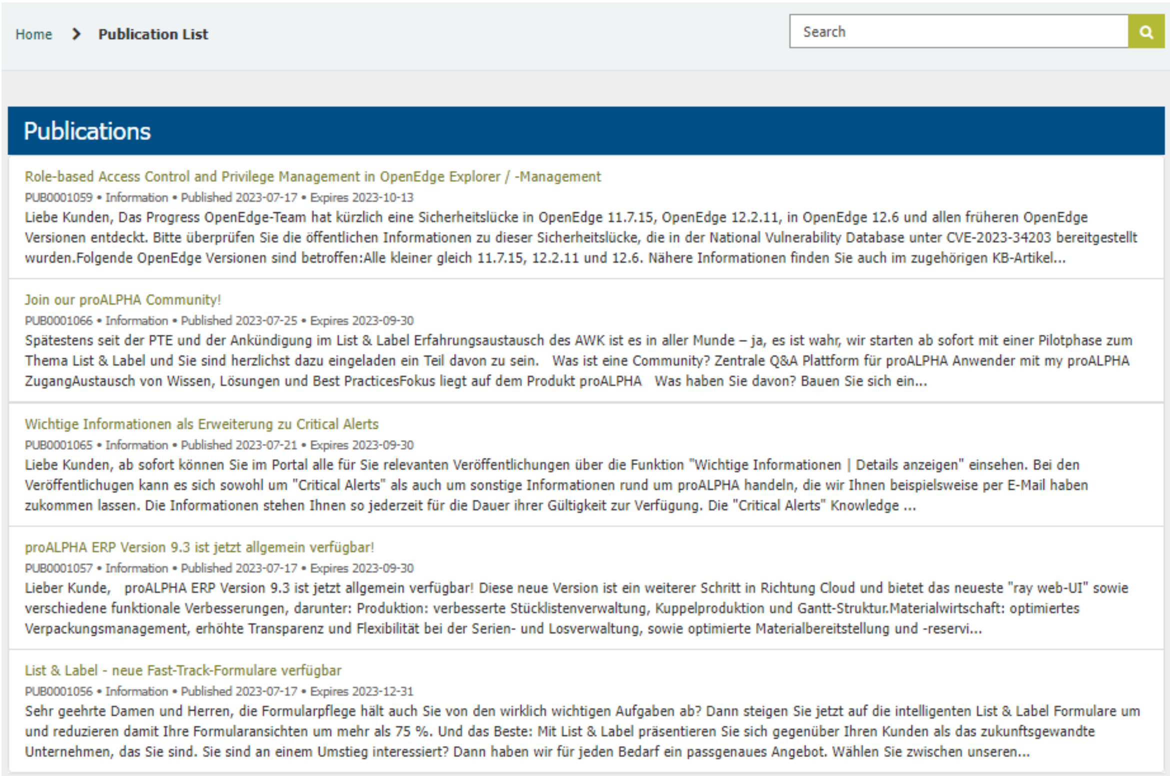
The points are assigned as follows:

Points	Action
2	Bookmark question
5	Give question positive evaluation
5	Mark comment as useful
5	Mark document as useful
5	Mark video as useful
5	Mark blog as useful
20	Mark answer as useful
20	Publish document in forum
20	Bookmark document
20	Publish video in forum
20	Bookmark blog
20	Bookmark video
40	Mark answer to question as correct
50	Publish blog in forum

6. Important Information

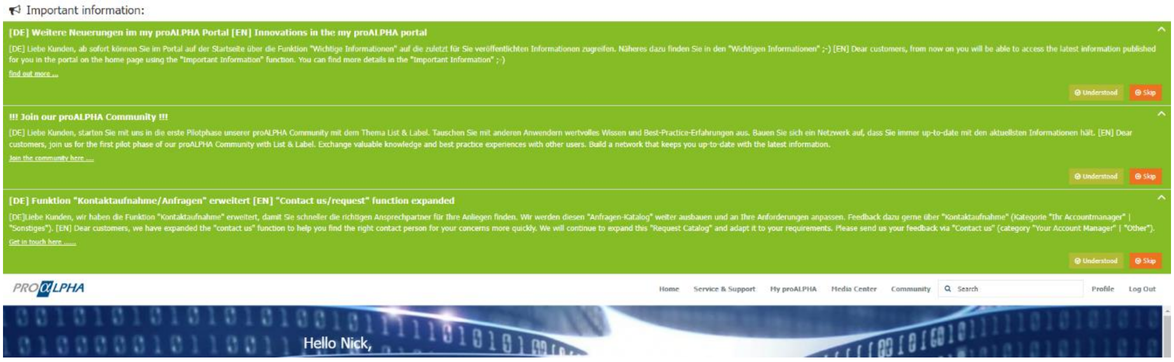
The start page provides you with important information:

Here you can view all information (publications) relevant to you during their validity period:



7. Announcements

Important announcements and information are displayed on all pages above the ribbon.

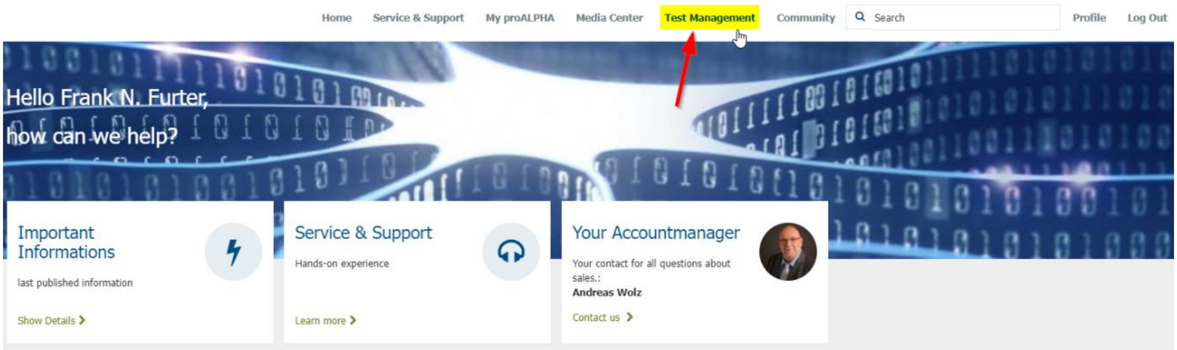


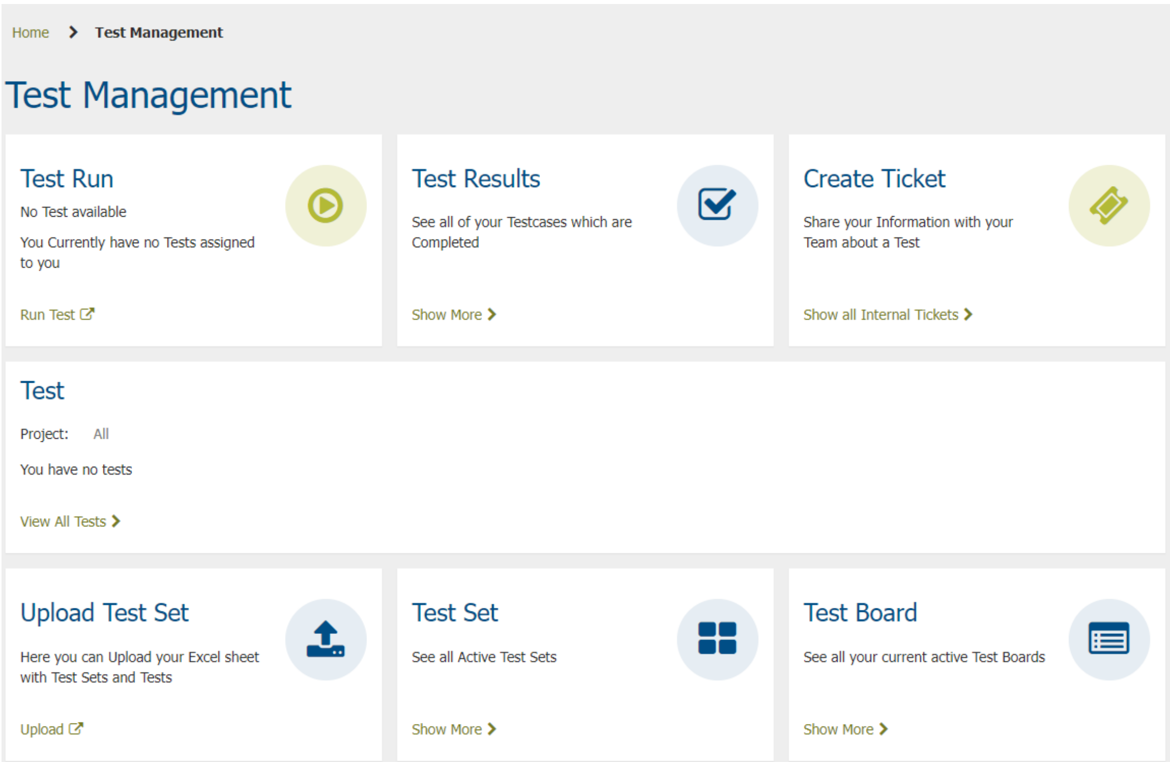
The announcements are always in both German and English. If you have read the announcement, you can hide it by clicking 'Verstanden'. Otherwise, you can skip the announcement for the time being. When you log into the portal the next time, the information is going to be displayed again.

If there are further information available regarding an announcement, you can find a link named accordingly in the announcement.

8. Test Management

If you want to use test management, get in touch with your proALPHA project team. You can then go to Test Management on the start page of the portal:

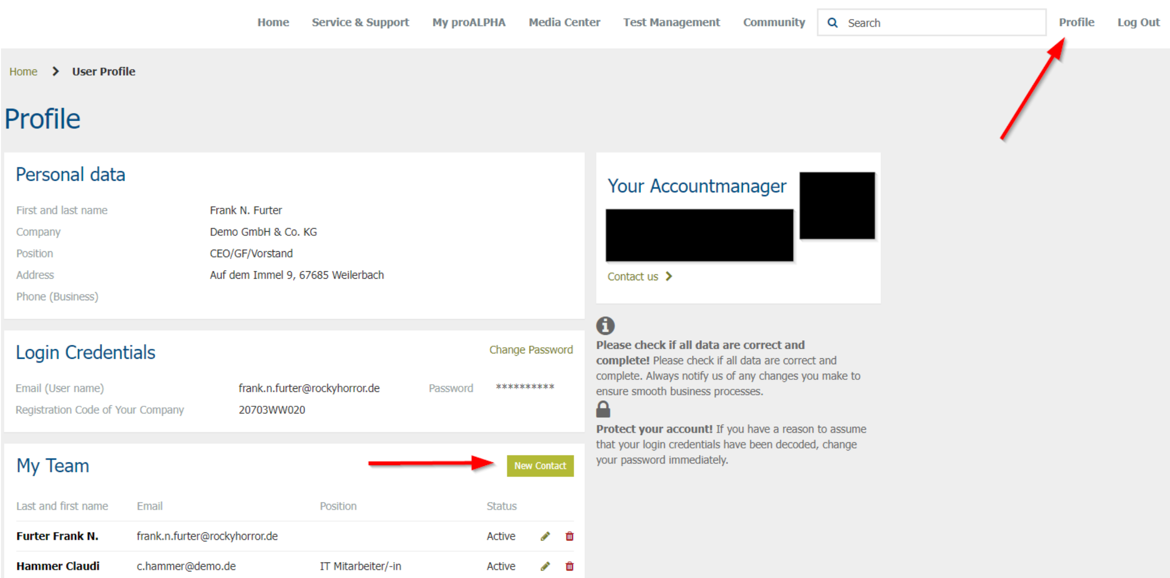




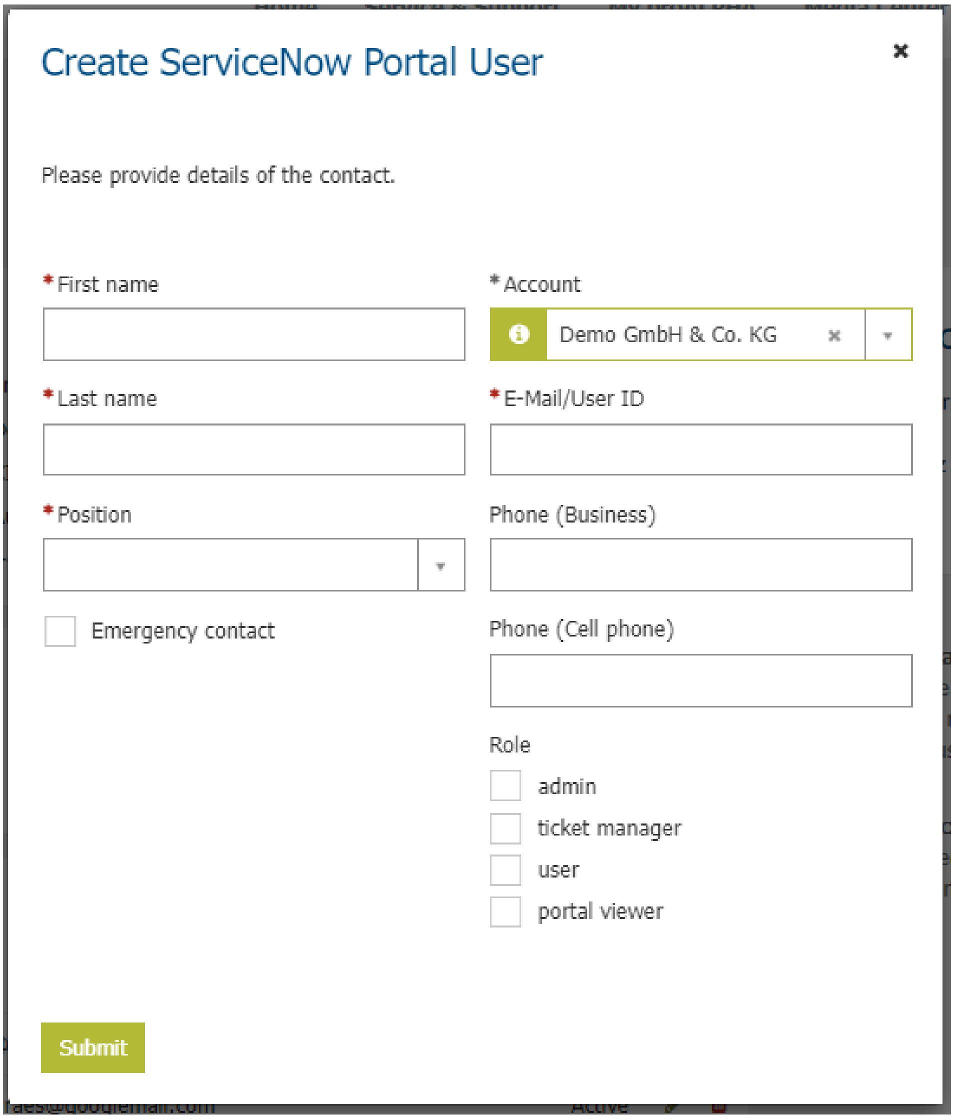
9. My Team / Invite and Manage Team Members

You as an admin have invited another person

As an admin for *my proALPHA*, you are entitled to invite your team members to *my proALPHA* and assign them roles. To do so, got to "Profile."



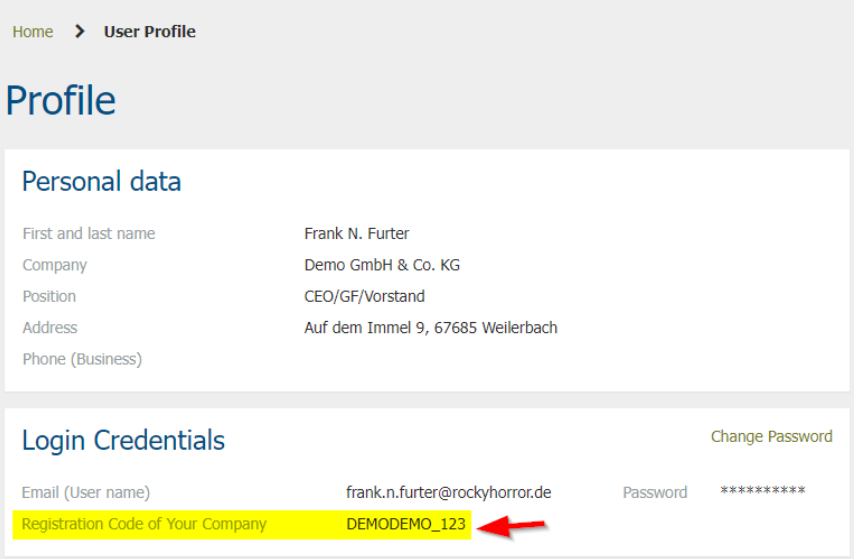
Click "New Contact" to invite a person to *my proALPHA*.



The new contact receives an e-mail with a link to set a password. When the password is set, the account is activated.

You have forwarded the registration code

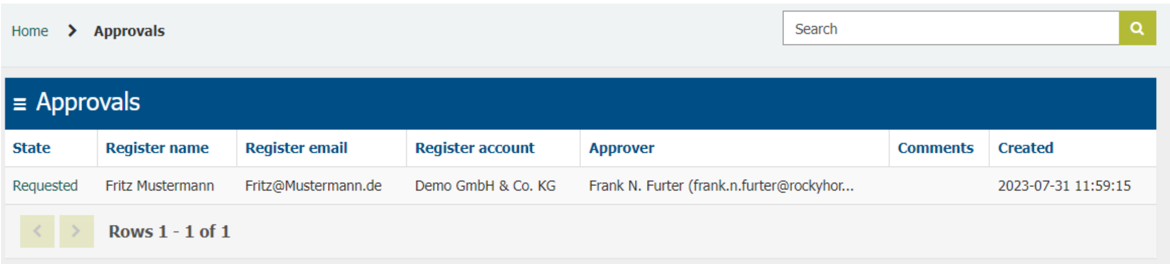
You can view the registration code in your profile:



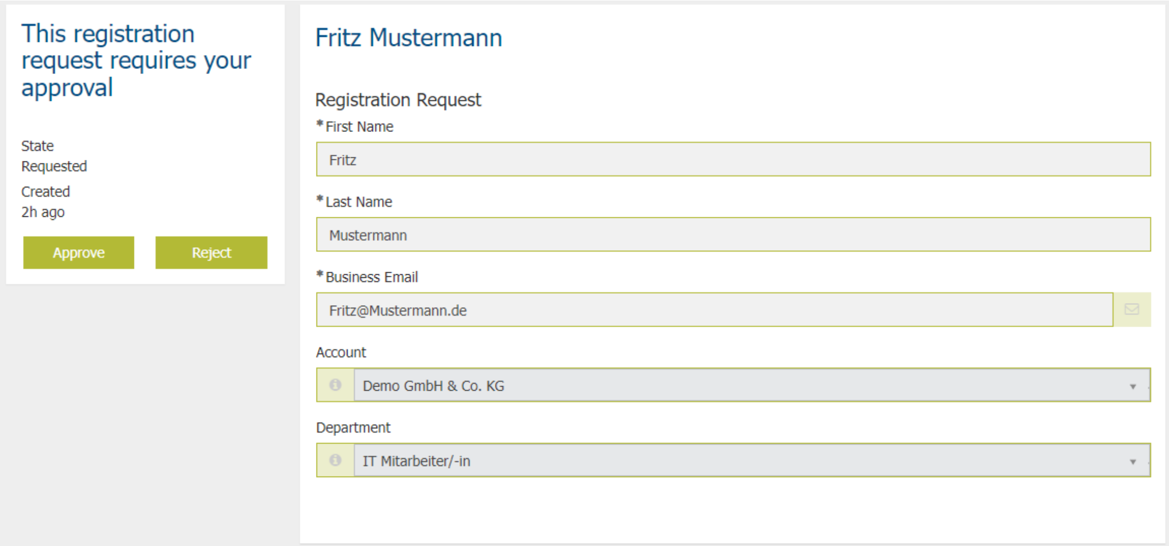
If you have forwarded the registration code to a person who has not signed up yet, *my proALPHA* automatically notifies you that someone wants to sign up.

Under "Profile", a section labeled "Approvals" shows you that new approvals are pending.

You can display all approvals.



By clicking on 'Approve', you can process the request and accept or reject it.

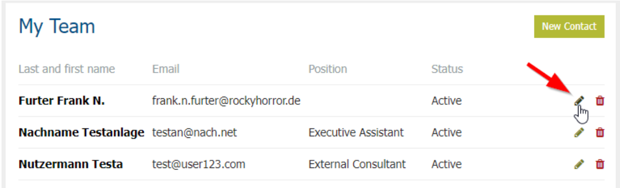


Portal roles, set other users to inactive

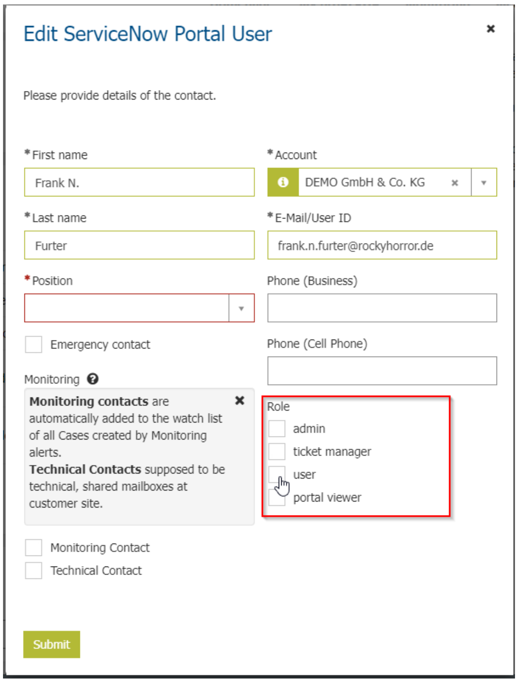
You can use the admin role to manage your colleagues' access and portal permissions. This table provides an overview of which role has which permissions in the portal:

Authorization	Admin	Ticket-manager	User	Portal Viewer	None/Inactive
Access to the portal	✓	✓	✓	✓	✗
Create tickets	✓	✓	✓	✗	✗
View tickets, add to watchlist/as contact	✓	✓	✓	✓	✗
Generally view and edit all tickets from colleagues	✓	✓	✗	✗	✗
Manage portal access, assign roles, deactivate access	✓	✗	✗	✗	✗
Read KB-articles	✓	✓	✓	✓	✗
Access to Idea Management	✓	✓	✓	✓	✗
Use general search	✓	✓	✓	✓	✗

If, as an admin, you would like to temporarily deactivate the access of colleagues, you can also do this under "Profile". Then click on the pencil symbol under "My Team".



Remove all roles from the person you want to make inactive.



Then click on the "Submit" button and the access is inactive; the user can no longer access the portal. If you want to reactivate the user, add the corresponding roles again.