



Perficient Life Sciences Application Support User Guide

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About This Document

Revision History

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1 Overview

Perficient - Life Sciences (Perficient-LS) Support provides an online support system that ensures a quick and efficient means of reporting and tracking customer support requests. The support site is accessible from the web and uses a secure protocol (https) to encrypt all communication.

This system allows clients to log in via the web and open a support request ticket. Once a request ticket is submitted, the system sends an email “ticket stub” with a tracking number to the Requestor, and forwards the request to Perficient-LS Support staff (Support staff) who assign it to the appropriate person and open an email-based communications channel with the Requestor. The email notification system provides a convenient way for users to track and manage their support requests.

All support request communications and activities are tracked in a database and are available online for user viewing. Users are able to view all information and history for both their open request tickets and closed (resolved) request tickets.

The Perficient-LS Support site (Support site) is available to subscribing clients, and provides direct, personal assistance for your application quandaries. A knowledge base of commonly encountered application problems is also available for your reference.

Users may wish to skip directly to sections detailing the main features and functions of the site, such as [User Interface](#), [Creating New Tickets](#), [Updating Tickets](#), and [Articles](#) (knowledge base). A table of contents may be found on the previous page.

Note: You can use this document’s bookmarks to navigate.

2 Basics

The support site is accessible via the web, so all you need to get started is:

- Internet access
- A web browser
- Your Perficient-LS Support login user name and password

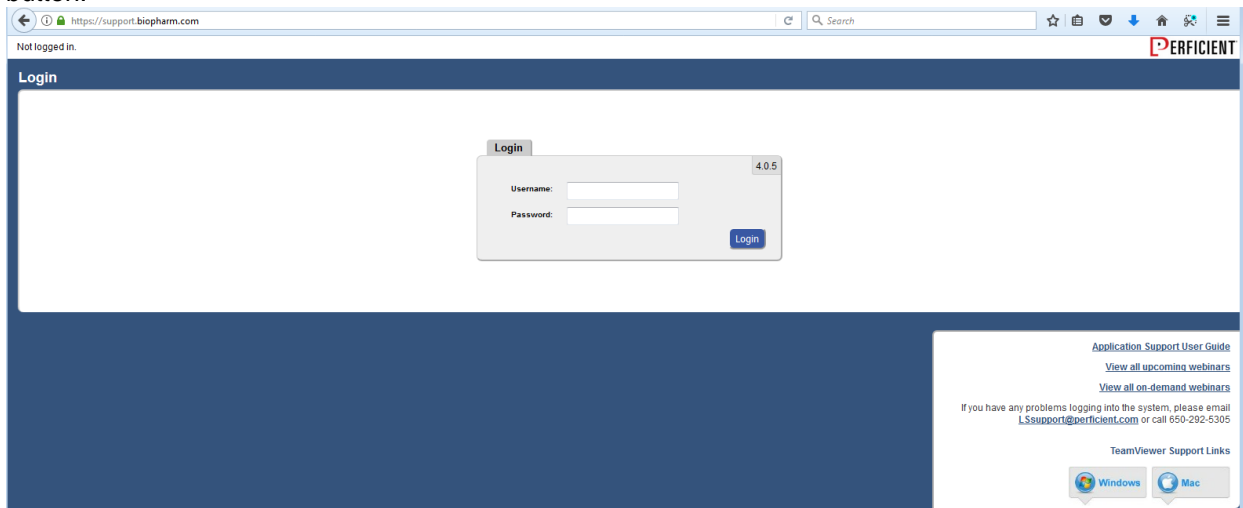
As a Perficient-LS Support client, you will be provided with a username and password that will enable you to log into the system.

2.1 Logging on

The login page is available via the following:

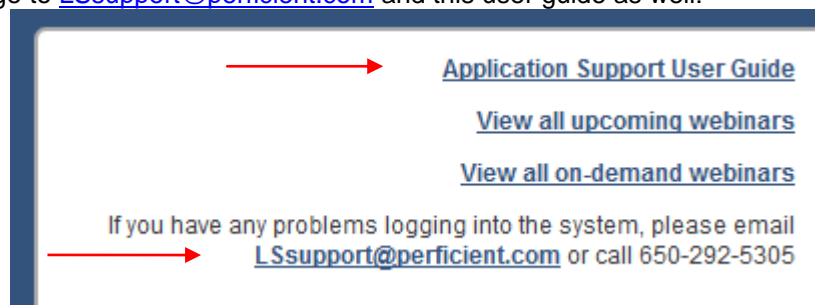
- Click this hyperlink or enter this URL in your web browser: [https:// support.biopharm.com](https://support.biopharm.com).

Enter your assigned **username** and **password in each appropriate box, and then click the Login button.**



If you have questions about **the login process** or need to request a username and password send an email to LSsupport@perficient.com.

Hyperlinks are provided on the login page to LSsupport@perficient.com and this user guide as well:

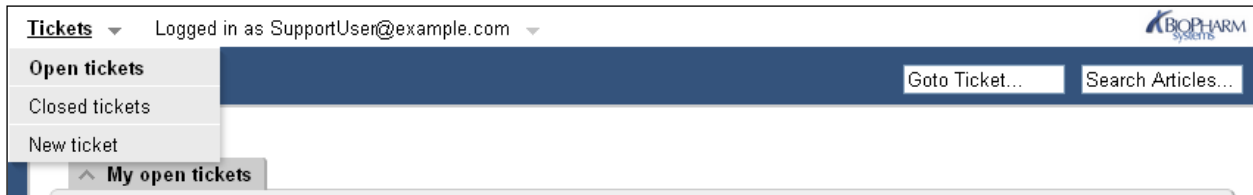


2.2 User Interface

Once logged in, the initial page is displayed with a table of open tickets belonging to the current user, as well as user interface features. The components of the user interface are displayed below:



1. **Tickets Menu** – The primary menu for navigating to open tickets (first page after logging in), closed tickets (tickets that have been resolved), and creating a new ticket. For more information on finding tickets, see [Navigating to Tickets](#).



- a. **Open tickets** – Select this option to view open tickets (tickets that are currently being worked on).
- b. **Closed tickets** – Select this option to view closed tickets (tickets that have been resolved).
- c. **New ticket** – Select this option to create a new ticket.

2. **User Menu** – Use this menu to change your password or log out.



- a. **Preferences** – Select this option to change your password.
 - b. **Logout** – Select this option to log out of your account.
3. **Goto Ticket Box** – Enter a ticket number here and then press **[Enter]** to navigate directly to a ticket.
 4. **Article Search Box** – Enter search terms here and then press **[Enter]** to search for articles (knowledge base).
 5. **'My open tickets' Table** – Any tickets that are open and associated with your account will appear here. For more information, see [Navigating to Tickets](#).
 6. **Link to User Guide** – A hyperlink to this user guide.

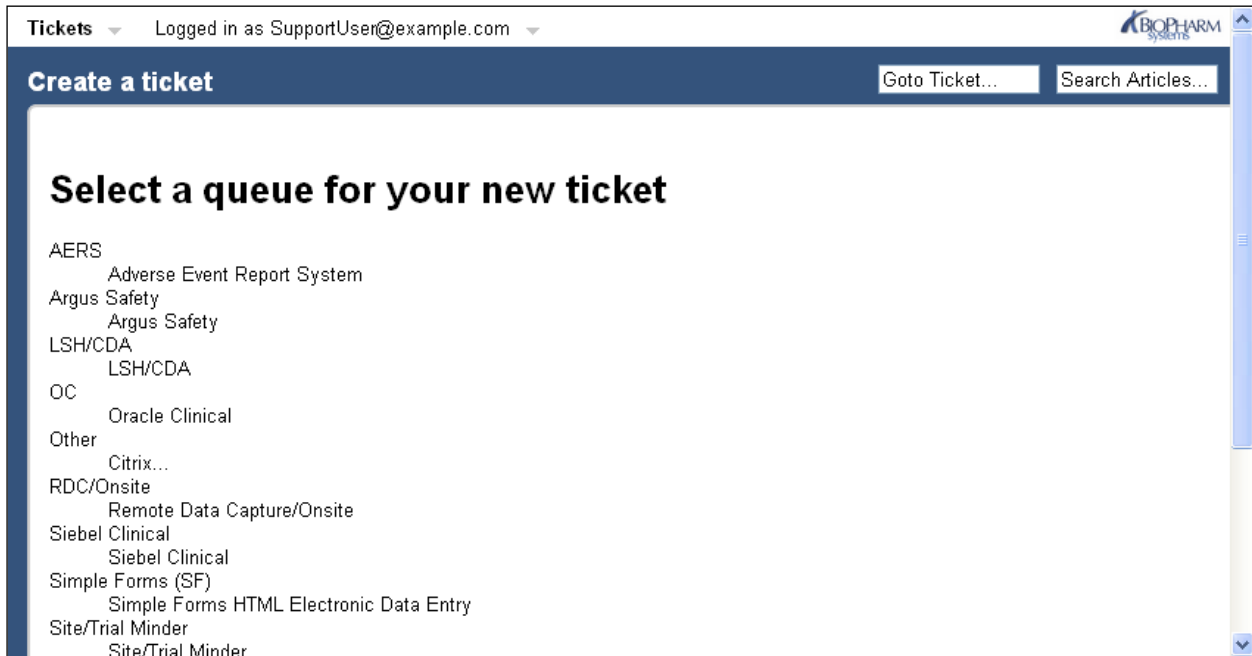
3 Tickets

A ticket is an electronic record that represents a request and the work being performed on that request. Creating a ticket creates a centralized record of the issue that the Support staff can use to resolve the request.

3.1 Creating New Tickets


Instructions:

1. From the **Tickets Menu**, select **New Ticket**. The queue selection page appears:



2. Select the appropriate queue from the list (Siebel Clinical in this example). The 'Create a ticket' page appears:

Tickets ▾
Logged in as SupportUser@example.com ▾



Create a ticket

General

Queue: **Siebel Clinical** (Siebel Clinical)

Requestors:

Cc:

Subject:

Contact Info - Please provide your contact information in the following fields:

First & Last Name: Email Address:

Phone Number:

Attachments

Attach file: No file chosen

Description - Use the following field to explain in as much detail as possible what the issue is. Please include the following:

- Application or System: OC, RDC/Onsite, TMS, AERS, Argus, Siebel Clinical, etc.
- Mode: Test or Production
- Description: clear and detailed description of the problem and the desired result
- Activity/Action: What the user was doing when the problem occurred
- Troubleshooting: What has been done so far to troubleshoot
- Application URL: The URL used to access the application
- Database Name: If applicable
- Error(s): Exact text of any error message(s) (use copy and paste if possible)

Describe the issue below:


BioPharm Support System User Guide

3. Fill out the appropriate fields. Fields of interest include:

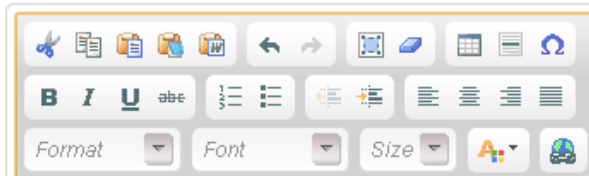
a. **General**









- i. **Queue** – The category that this ticket pertains to (auto-populated from the queue selection page). If the wrong queue is selected, select **New Ticket** from the **Ticket Menu** to start over.
- ii. **Requestors** – The user or users who are asking for an issue to be resolved. This field auto-populates with the user creating the ticket. Other users may be added.

- iii. **Cc** – User or users who have an interest in the issue but are not the direct requestors (similar to an email or letter carbon copy). These individuals will receive email notifications whenever the ticket is updated.
 - iv. **Subject** – The issue that the ticket concerns (like an email subject). The subject of a ticket will appear in all emails pertaining to it.
- b. **Contact Info** – Contact information is important because many Perficient-LS Support accounts are group accounts – providing contact information streamlines communication.
- i. **First & Last Name** – Your first (use name you like to be called) and last name.
 - ii. **Email Address** – An email address at which you can be contacted.
 - iii. **Phone Number** – A phone number at which you can be contacted.
- c. **Attachments**
- i. **Attach file** – Any files that may be of use in resolving the ticket. Click [**Choose file**] to attach a file – including a screenshot can be very helpful.
- d. **Description**
- i. **Describe the issue below** – The body and main content of the ticket. Use this field to explain in as much detail as possible what the issue is. Include the following:
 - **Application or System:** OC, RDC/Onsite, Argus, Siebel Clinical, etc.
 - **Mode or Environment:** Test or Production
 - **Description:** Clear and detailed description of the problem and the desired result
 - **Activity/Action:** What the user was doing when the problem occurred
 - **Troubleshooting:** What has been done so far to troubleshoot
 - **Application URL:** The URL used to access the application
 - **Database Name:** If applicable
 - **Error(s):** Exact text of any error message(s) (use copy and paste if possible)

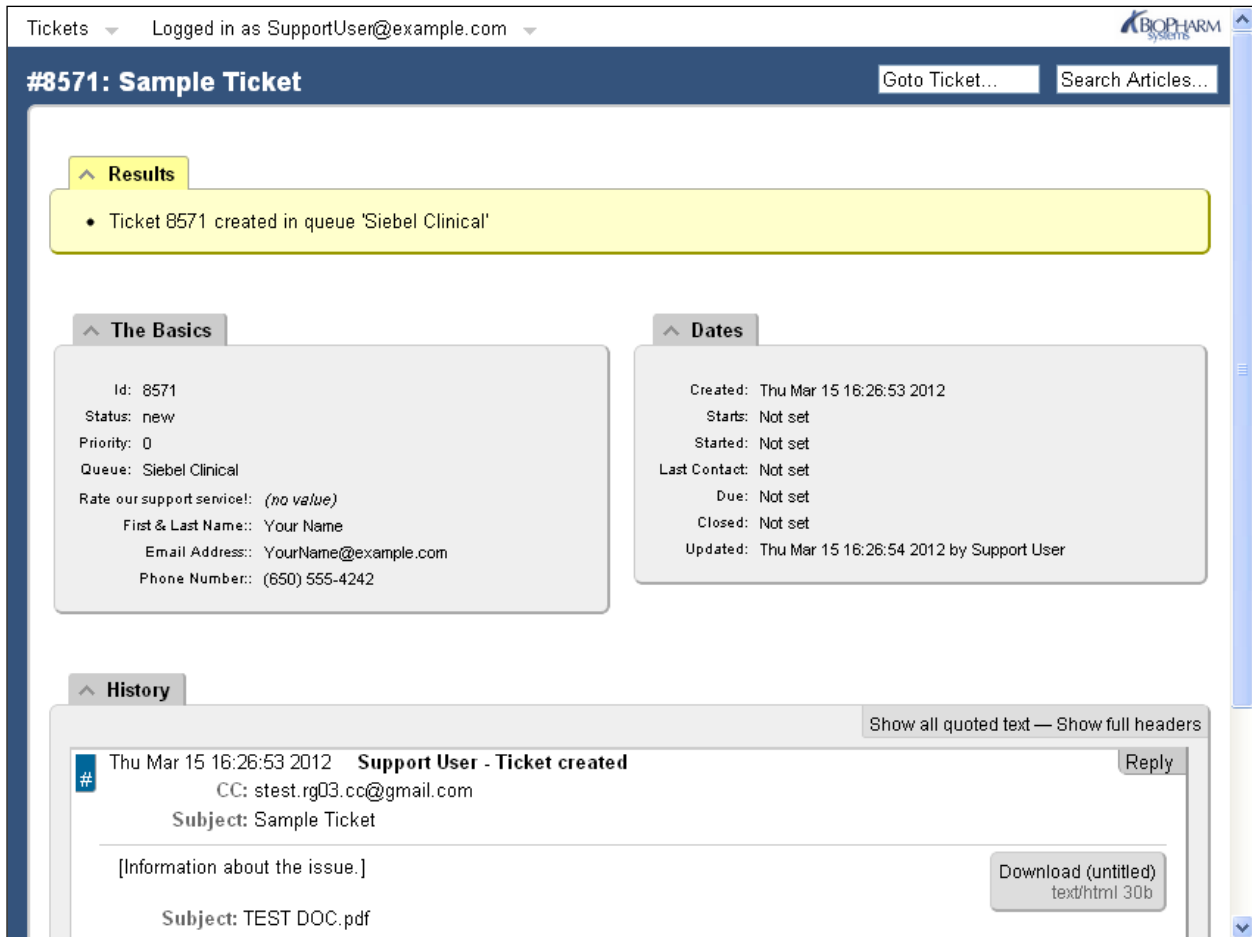
Note the  icon in the upper right-hand corner of the description field. Clicking this button brings up rich text editing options:

Describe the issue below:



Hovering the cursor over each icon brings up a tooltip explaining each function. Rich text editing is useful for formatting longer tickets. Some options include: creating bullet points or numbering () () , pasting as plaintext () or removing formatting () , inserting hyperlinks () , undo and redo () () , and inserting special characters () . Many of these can also be accessed through standard keyboard shortcuts (e.g., [**Ctrl+Z**] for undo).

4. Click **Create ticket**. The newly created ticket appears:



Once ticket is successfully created, an email is sent to:

- The analyst monitoring the system
- The Perficient-LS Support Manager
- The user (or group of users in the case of a group account) that created the ticket (Requestor)
- Any email address in the 'Cc' field

The Perficient-LS Support system communicates via email to keep you informed of the status of your request ticket. You will automatically receive an email update communication for these events:

- A request is submitted
- Support staff needs additional information regarding your request
- Additional support information is added to the ticket
- A ticket is resolved

When you receive email from the Support staff requesting additional information, respond to the request by logging into the support site via the URL provided in the email.

Note: Do not reply to the request from the email message. Respond by logging into the system and using the **Reply** hyperlink on the ticket. This will ensure the communication is added to the ticket history. For more information, see [Updating Tickets](#).

3.2 Navigating to Tickets

There are a few options for navigating to tickets. All email notifications regarding tickets will contain a URL leading directly to the ticket (if you are not logged in, this URL will bring you to the login page first).

Below is a sample message:

From: Support User do not reply <donotreply@perficient.com>
 Subject: [PLS #8571] AutoReply: Sample Ticket
 Date: March 7, 2017 4:35:35 PM PST
 To: SupportUser@perficient.com

Greetings,

This is an automatic notification that ticket #8571 has been created.

To view your ticket and correspond, please user the following link:
<https://support.biopharm.com/Ticket/Display.html?id=8571> >

If you created this ticket, there is no further action needed at this time.

Regards,

Perficient LS Support

Note: Please DO NOT Reply to this Email; using Reply DOES NOT update the Ticket.

 RT-Attach-Message: yes

[Original Ticket Body.]

Follow this URL to the ticket

You can also navigate to a ticket using the interface features listed below:

Tickets ▾ Logged in as SupportUser@example.com ▾

Open tickets **1** **3** Goto Ticket... Search Articles...

Closed tickets **2**

New ticket

^ My open tickets

Open tickets (1) links to all open/stalled/customer working tickets, **Closed tickets** (2) links to all closed tickets and the **Goto Ticket Box** (3) can take you directly to a ticket.

1. **Open tickets** – This option links to the ‘Open tickets’ page. Any tickets that are open and associated with your account will appear on the ‘My open tickets’ table:

^ My open tickets

#	Subject	Status	Requestors	Owner
8570	Sample Ticket	new	SupportUser@example.com	Nobody
8571	Sample Ticket	new	SupportUser@example.com	Nobody

Table columns include:

- a. **#** – The ticket number (used for reference and searching). Clicking on a ticket number takes you to that ticket.
 - b. **Subject** – Like an email subject, this explains what the ticket concerns. Clicking on a ticket's subject takes you to that ticket.
 - c. **Requestors** – The set of users who have requested this ticket (while requestors often create tickets, tickets may also be created by Support staff for a requestor).
 - d. **Owner** – The Support staff member to whom the ticket has been assigned.
2. **Closed tickets** – This option brings you to the 'Closed tickets' page. You will always receive an email notification when a ticket has been resolved. Any tickets that are resolved and associated with your account will appear on the 'My closed tickets' table:

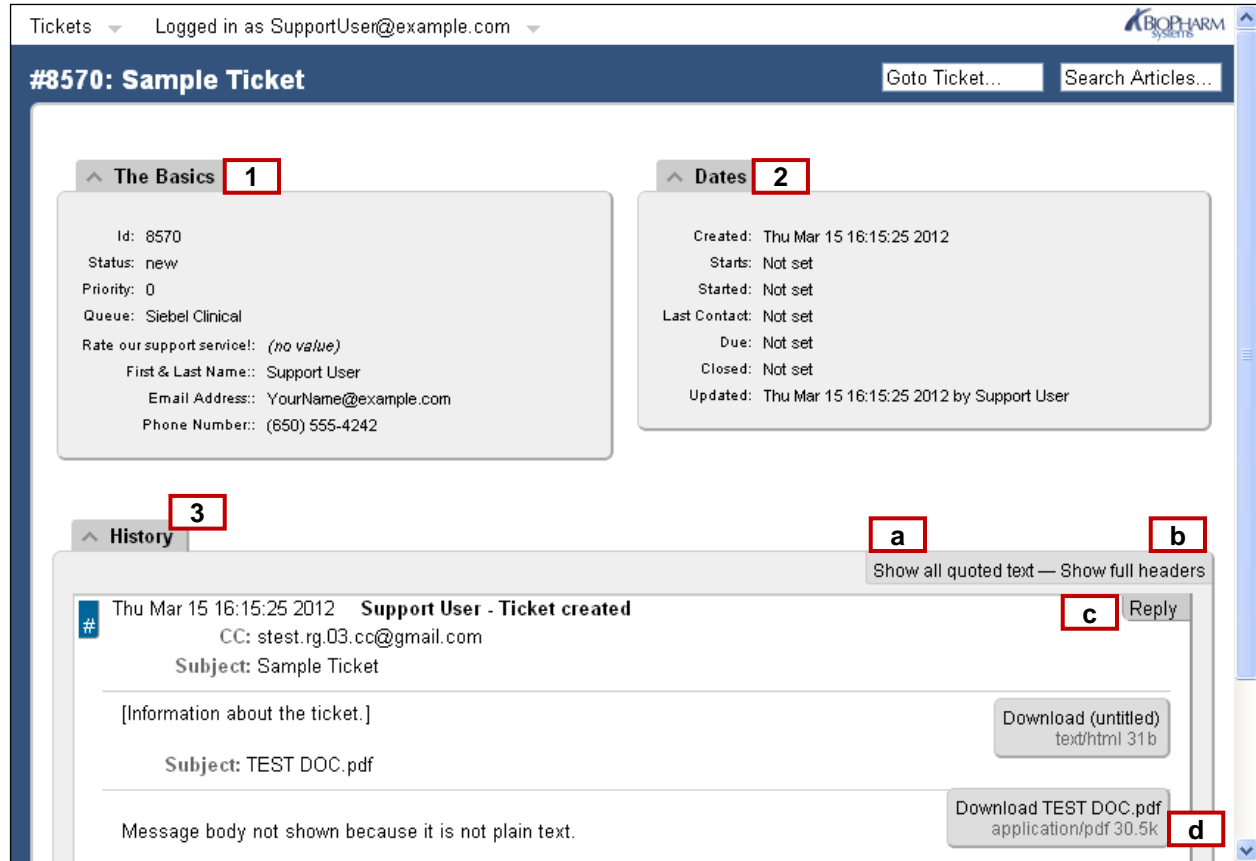
^ My closed tickets

#	Subject	Status	Requestors	Owner
8573	Closed Sample Ticket	resolved	SupportUser@example.com	SupportStaff@biopharm.com

- 3. **Goto Ticket Box** - Enter a ticket number here and then press **[Enter]** to navigate directly to a ticket.

3.3 Ticket Components

Each ticket has a few components or “panels”:



1. **The Basics** – This panel provides some basic information about the ticket including its ticket number ('Id'), its current 'Status' (new, open, resolved, etc.), its 'Queue', and any ratings entered into the 'Rate our support service!' field (for more information on ratings, see [Updating Tickets](#)).
2. **Dates** – This panel includes information about when the ticket was created, and the last time Support staff have updated the ticket.
3. **History** – This panel contains the ticket's correspondences and transactions. The initial correspondence with which the ticket was created is listed here, as well as any ownership or status changes, and any further correspondences or updates. Entries are listed in chronological order, with the most recent item at the top.
 - a. **Show all quoted text** – Text that is quoted in a correspondence will be hidden by default on the 'History' panel; click this option to display quoted text.
 - b. **Show full headers** – Brief headers are shown by default; click this option to display all header information for the correspondences.
 - c. **Reply** – Click this to correspond or update the ticket with new information.
 - d. **Download {file}** – Click the 'Download' hyperlink to download any attachments.

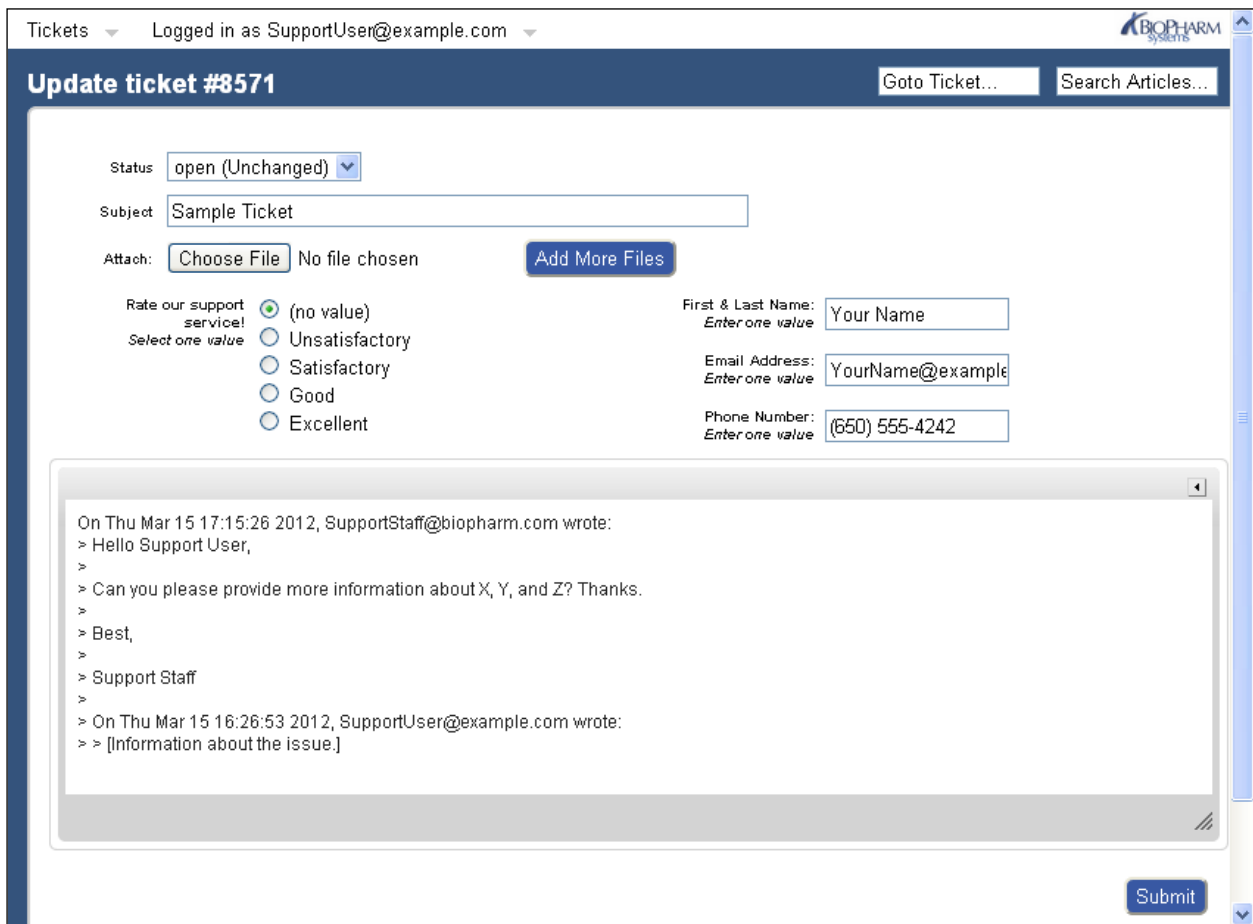
Use the 'History' panel to update the ticket (see [Updating Tickets](#)).

3.4 Updating Tickets

Instructions:




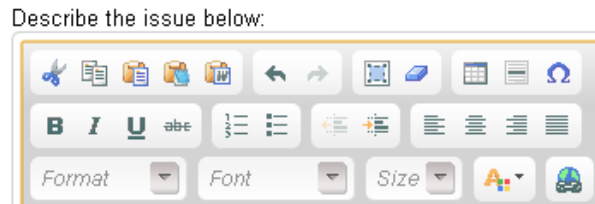
1. After navigating to a ticket (see [Navigating to Tickets](#)), scroll down to the ticket's 'History' panel and click **Reply**. The 'Update ticket' page appears:









2. Fill out the appropriate fields. Note that the 'Status', 'Subject', 'First & Last Name', 'Email Address', and 'Phone Number' fields are already populated (however you can use this form to correct contact information). Other fields of interest include:
 - a. **Attach** – Attach any files that may be useful (e.g., screenshots). Please note: Attachments can be attached one at a time/per ticket update and the size limit is 10MB

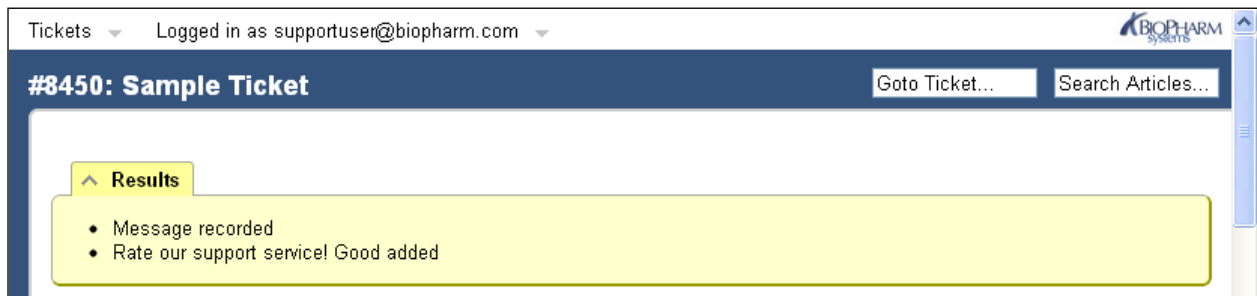
- b. **Rate our support service!** – This field is available on every ‘Update ticket’ page and is a good tool for providing feedback. Users are encouraged to submit feedback using this field. In any open or closed ticket, click the Reply button to complete the “Rate our support service!” radio button.
- c. **Body** – Enter the content of your correspondence or update here.

Note the  icon in the upper right-hand corner of the description field. Clicking this button brings up rich text editing options:



Hovering the cursor over each icon brings up a tooltip explaining each function. Rich text editing is useful for formatting longer tickets with bold and underlined text, creating bullet points or numbering (), pasting as plaintext () or removing formatting (), inserting hyperlinks (), undo and redo (), and inserting special characters (). Many of these can also be accessed through standard keyboard shortcuts (e.g., **[Ctrl+Z]** for undo).

- 3. Click **Submit**. The ‘Update ticket’ page appears with a confirmation message and the newly added correspondence in the ‘History’ panel:



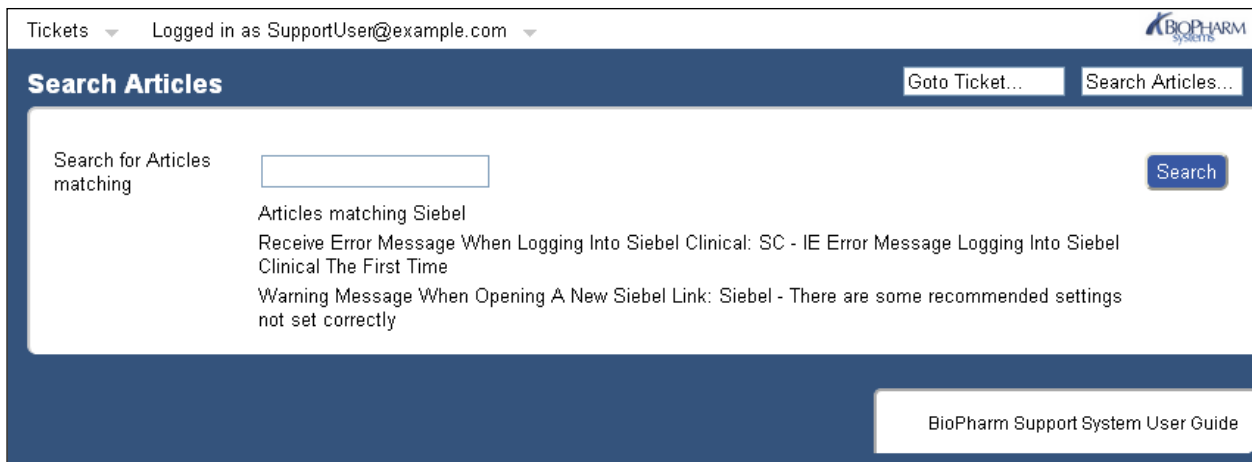
Note: Perficient-LS Support staff receive an email notification about your update once the correspondence is submitted.

4 Articles

Perficient-LS Support includes a knowledge base of common application problems and frequently asked questions (FAQs). As requests are worked through and resolved, the knowledge gained is documented in the knowledge base as articles. These articles are an invaluable reference for those never previously documented application features that may baffle even the experienced user.

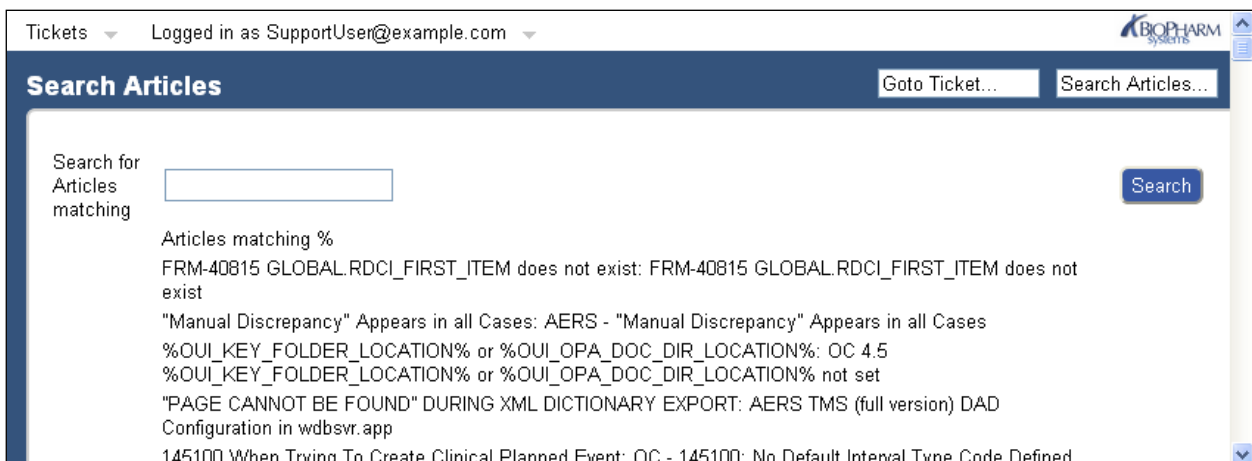


To access articles, simply enter a keyword (case sensitive) in the **Article Search Box** and then press **[Enter]**. Then the 'Search Articles' page will appear with your results displayed:



Clicking on the name of an article will bring up that article.

To browse all the articles in the knowledge base, use the percent sign (%) in the search field:

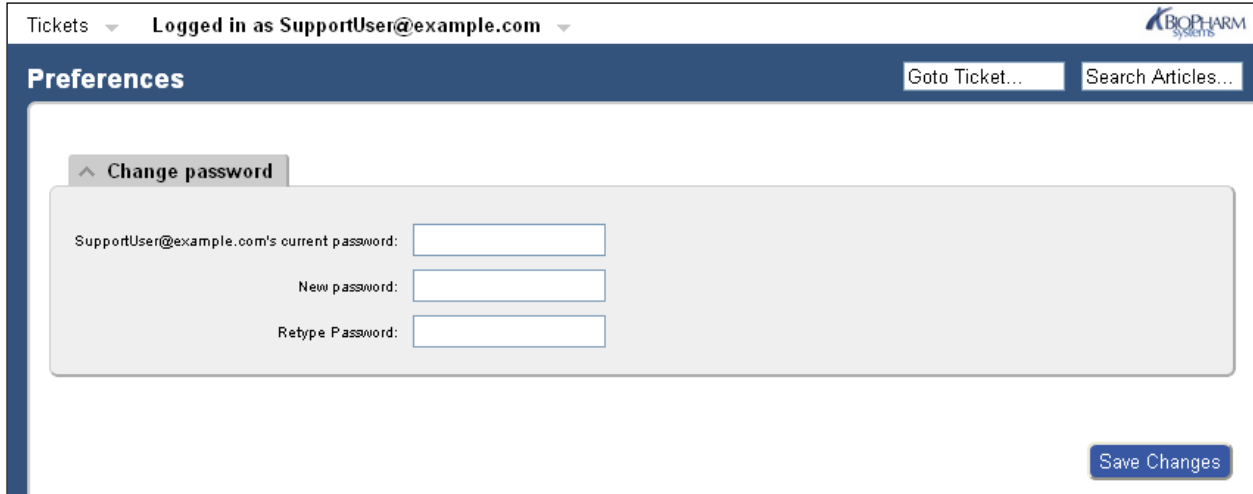


5 Password Change

Instructions:



1. Click **Preferences** on the **User Menu**. The 'Preferences' page appears:



2. Enter your current password in the '{user} current password' field, and your new password in the 'New password' and 'Retype Password' fields.
3. Click **[Save Changes]** or press **[Enter]**.

Note: We recommend that your password be longer than seven characters and be a mixture of upper/lower case, letters, digits, and punctuation.

6 Logging Out



You can log out of the support site from any page. Just click **Logout** from the **User Menu**. When you log out of the support system, you will be re-directed to the login page.

For security reasons we recommend that you log out of the Perficient-LS Support site when you are done.