Getting Started Guide

Using the Customer Portal

v 1.2

09-September-2022

Revision: A

Publication Information

This publication is designed to assist in the use of the product as it exists on the date of publication of this manual and may not reflect the product at the current time or an unknown time in the future. This publication does not in any way warrant description accuracy or guarantee the use for the product to which it refers. Imagine Communications reserves the right, without notice to make such changes in equipment, design, specifications, components, or documentation as progress may warrant to improve the performance of the product.

Trademarks

Product names and other appropriate trademarks, e.g., SelenioFlex™, are trademarks or trade names of Imagine Communications or its subsidiaries.

Microsoft® and Windows® are registered trademarks of Microsoft Corporation. All other trademarks and trade names are the property of their respective companies.

Contact Information

Imagine Communications has office locations around the world. For domestic and international location and contact information, visit our Contact page (https://imaginecommunications.com/contact/).

Support Contact Information

For domestic and international support contact information see:

- Support Contacts (https://www.imaginecommunications.com/contact)
- Worldwide Support e-mail (mailto://support@imaginecommunications.com)
- Customer Community Portal (https://community.imaginecommunications.com/s/login/)
- Warranty & Contract Information (https://www.imaginecommunications.com/services/customer-care)
- Imagine Communications Training (https://imaginecommunications.com/services/training/)

Contents

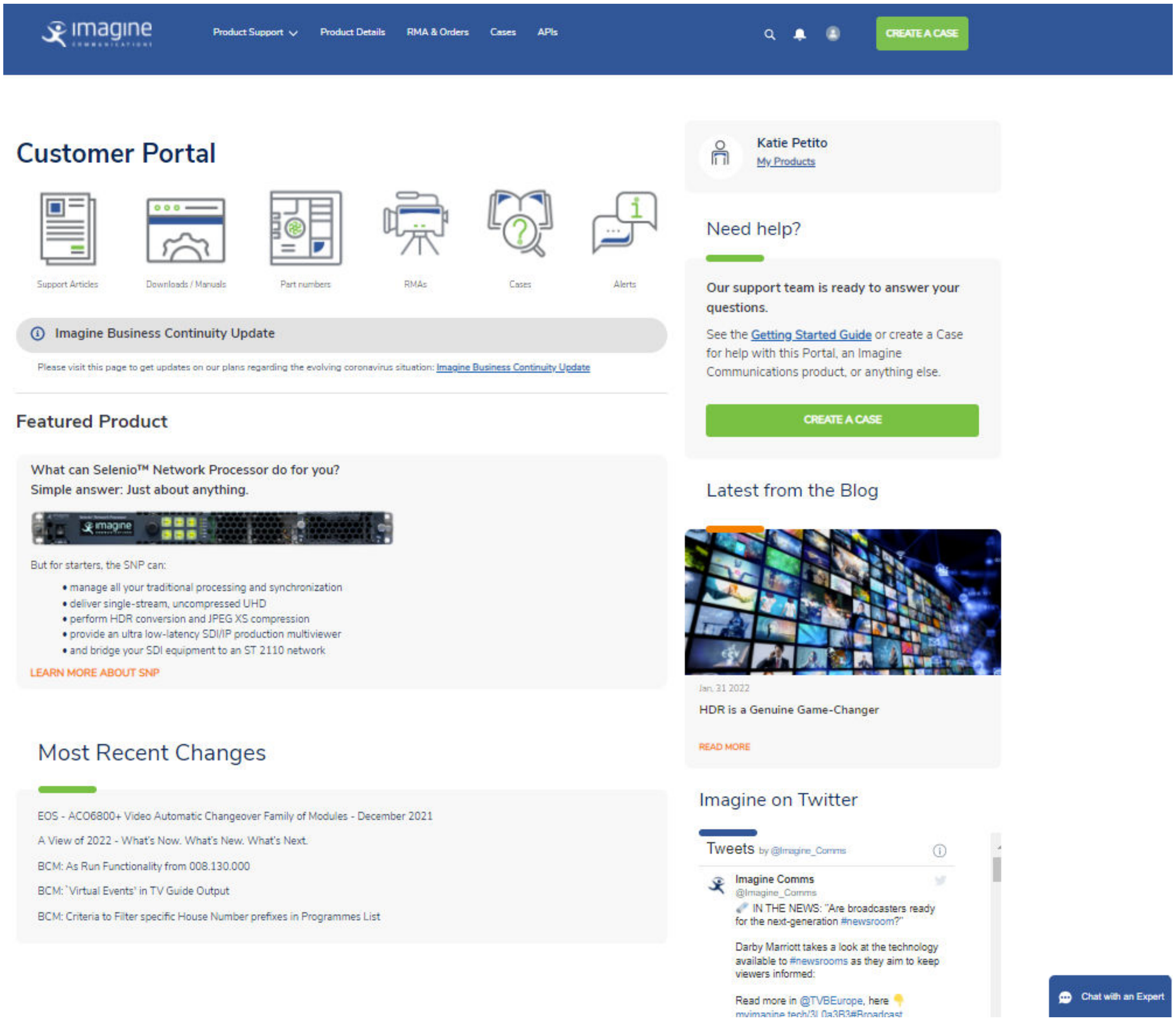
Welcome to the Customer Portal

Welcome to the Imagine Communications Customer community. This guide explains what is available in each community, how to set up an account, and how to use the features available.

You can log in or register here: http://community.imaginecommunications.com

The Customer Portal, also known as the Customer Community, allows you to create cases to get support for product- or account-related questions or ask for help locating information or documents. The Customer Portal also provides the following types of information:

- Support Articles: Access Imagine's Knowledge Base for product-specific information or existing solutions to problems.
- Downloads/Manuals: Software downloads and product manuals are organized by product name.
- Part Numbers: View Imagine product part numbers by current support status.
- RMAs: View your list of orders and Return Merchandise Authorizations by status.
- Cases: View your list of support cases by status.
- APIs: Developers can request access to view Imagine's customer-facing product APIs in SwaggerHub.
- Alerts: View notifications for Imagine groups you've joined or join new groups.



The Customer Portal Home Page

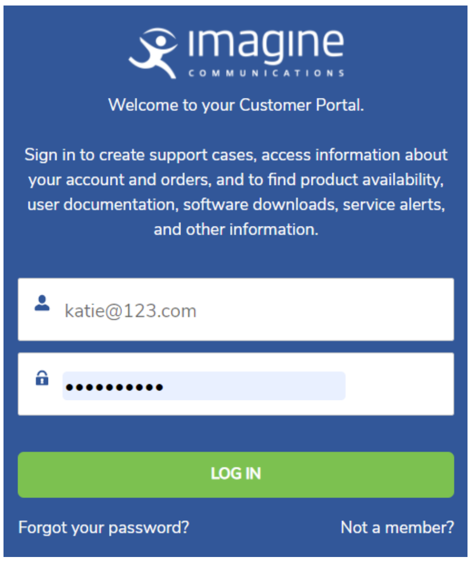
Managing Your Account

Setting Up a New Account

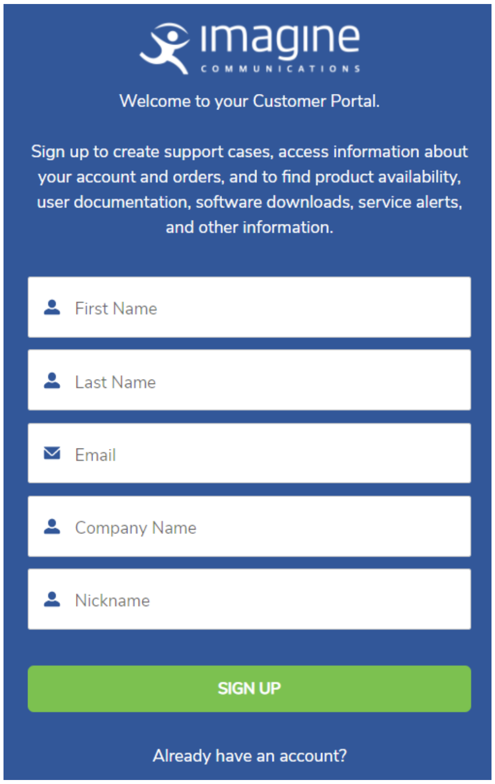
To create a new account on the Customer Portal:

1. Go to http://community.imaginecommunications.com
2. Click the Not a Member link.

   The Sign Up screen appears.

3. Click the “Not a Member” link on the Customer Community landing page and fill in the following fields.



- First Name: Enter your first name.
- Last Name: Enter your last name.
- Email: This will also be your login ID.
- Company Name: Your company name. Please be as clear as possible so we can use the information to associate you to the correct account in our database.
- Nickname: This is a public name that will be used for features at a later date.

4. When you are done making changes, click the Sign Up button.

   Imagine will send your password by email.

5. When you receive the email, click the link to set up your new password.

   This is the last step in the registration process. There will be a short delay while our team associates you with the correct account before you have access to everything.

Logging in the First Time

After registering for an account, you will be taken back to the Portal’s Home page.

To log in after registration:

1. Enter your login and password here to enter the Customer Portal.

   REMEMBER! Your Username/Login ID is the email address you used during registration. The first time you log in you will not be able to view much. Your registration request is now in our Service queue to be approved and connected with your company’s account. It should be connected fairly soon, but it can take up to 24 hours if we have a large number of requests. Please be patient!

2. If you receive the email notification that your account is enabled, please note that you need to click the “Forgot your password?” link in order to request your login password.

   You should be able to log in now.

Changing Your Account Settings

If you wish to change your account settings, please contact us by clicking the Create a Case button and filling out the form to make your request.

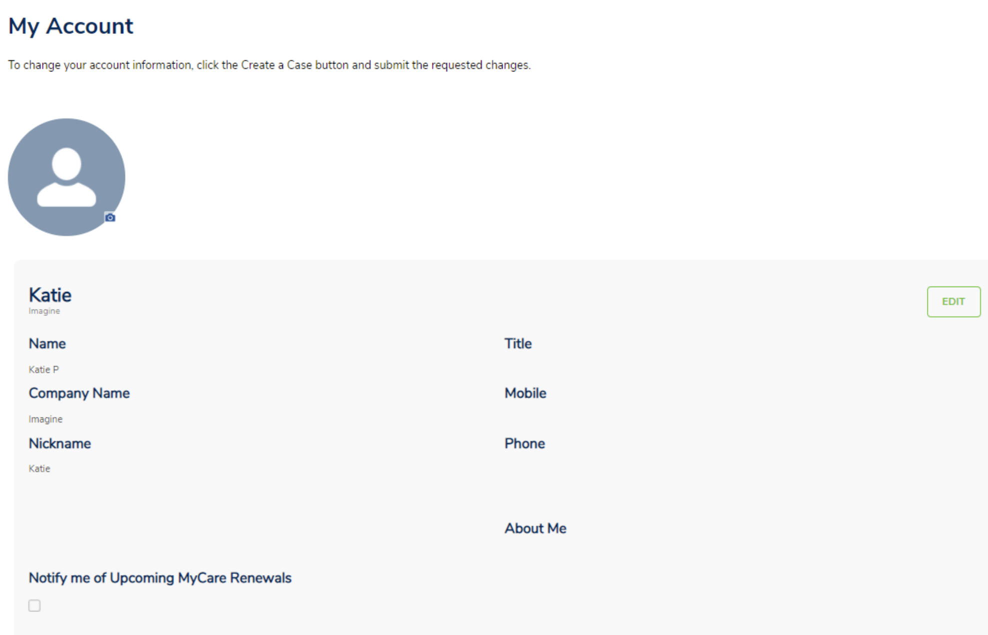
Changing Your Contact Information

Under My Account, you can view and update your basic contact information. You can also sign up for MyCare Renewals by checking the box on the My Account screen.

To change your profile information:

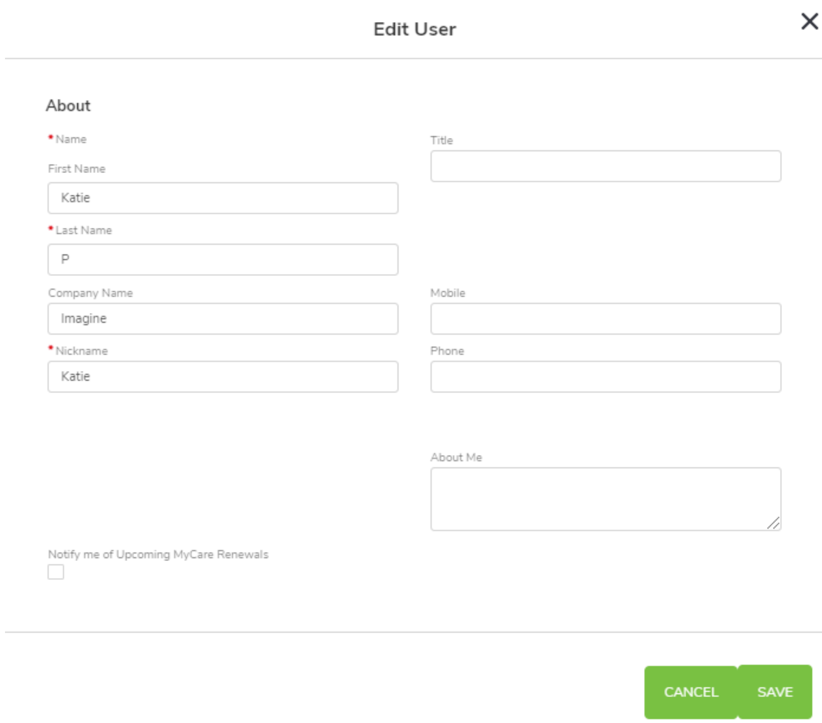
1. From the user profile icon in the top navigation bar, just to the left of the green Create a Case button, click the user profile icon and select Profile.

   The My Account screen appears.



2. To change any of the information shown, click the Edit button.

   The Edit User screen appears, and you can change any of the following information.



- First Name
- Last Name
- Company Name
- Nickname
- Title
- Mobile
- Phone
- About Me

3. When you are done making changes, click the Save button.

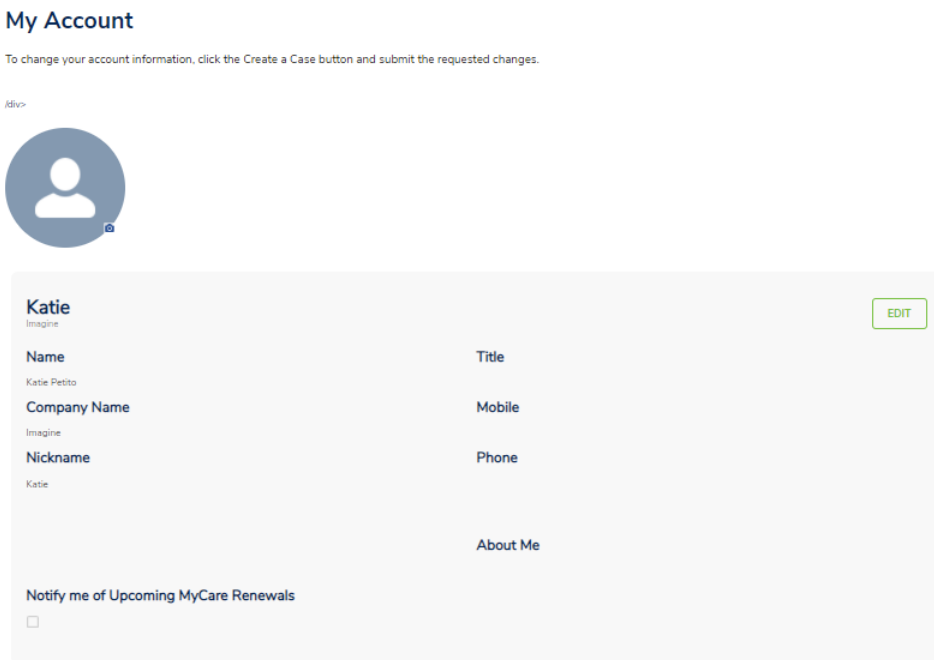
Signing Up for MyCare Renewal Notifications

You can sign up for automatic notifications from Imagine when your renewals are about to expire. This is also done on the My Account screen.

To sign up for MyCare Renewal notices:

1. From the user profile icon in the top navigation bar, just to the left of the green Create a Case button, click the user profile icon and select Profile.

   The My Account screen appears.



2. Check the box that says, “Notify me of Upcoming MyCare Renewals”.
   You will be notified when your contracts are close to expiration.

Contacting Customer Support

There are up to three ways to contact Imagine's Customer Support if you need help. Depending on your support plan, you may not have access to all methods.

- By phone: If you have a critical issue, call us after you Create a Case. Creating a case provides a method for tracking your issue, as well as making sure you get immediate assistance in case your support contact is not available.
- Chat: You can speak directly with an Imagine Customer Support representative through the Portal.
- Create a Case: Use the green "Create a Case" buttons throughout the Portal to file a support ticket with details about your issue, as well as attach screen captures of error codes or other files, so we can resolve your issues more efficiently.

Reaching Imagine by Chat

At any time, you can click the "Chat" button in the lower right-hand corner of the screen to get help from a member of our team.

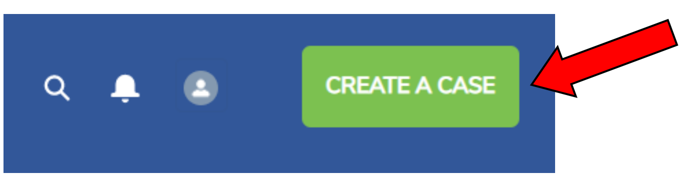
Creating a New Case

Imagine calls Customer Support requests "cases". When you need help from Imagine with a product, with questions related to your account, or with finding something on one of the Portals, you can create a case to record your request. There are two ways to create a new case for our Customer Support team.

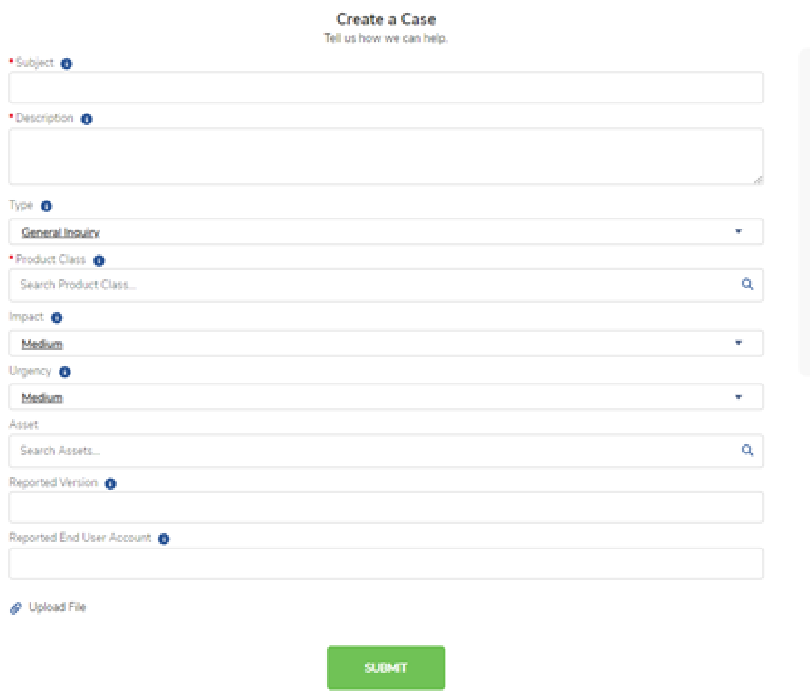
NOTE: If you are a North America-based customer, see the instructions "North America Customers: Filing Support Cases".

To create a new case:

1. On the top right of all screens, click the green "Create a Case" button.



The Create a Case screen appears.



Enter as much information as you can to help our support team route and answer your issue. As you type information into the case form, the articles on the side will update to suggest some answers for you.

- Subject: Enter the subject of your support request.
- Description: Give a detailed description of your issue. If your problem relates to a specific product, tell us the product and any details you have about the situation, data involved, and what you were trying to accomplish when the problem occurred.
- Service Site: Select from the drop-down menu.
- Product Class: Enter your product name into the field.

  The product name should populate automatically once you begin typing, but if you have trouble, type “ALL” into the field and select a product from the list that appears.
- Impact: Select from the drop-down menu. Medium is the default. Imagine’s Customer Support will change the impact if this is a critical issue.
- Urgency: Select from the drop-down menu. Medium is the default. Imagine’s Customer Support will change the impact if this is a critical issue.

  NOTE: **Changing the Impact and/or Urgency to create a High Impact and High Urgency case is not permitted by the system.** Leave those options as Medium, and for an urgent or critical case, submit your support case, then call us directly so we can assign it right away. You can find our contact phone numbers at https://imaginecommunications.com/contact/.
- Asset: Use this option to search for assets related to your product or issue.
- Customer Reference Number: If you have an ongoing issue, please enter your Customer Reference Number so we can add notes to your current file.
- Reported End User Account: Enter the name of the end user account if you are reporting this issue on behalf of another customer.

2. Please add any files or images of errors to your case by clicking the Upload Files button and navigate to the file(s) you want to include.

3. When you are done making changes, click the Submit button.

North American Customers: Filing Support Cases

The following instructions are for customers in North America to provide additional details for Customer Support.

When you fill out the Cases form, enter your information as shown:

- Subject: Enter following this format: *Station Name – Function Area Impacted – Summary of Issue* (e.g., WOSI – Inventory – Grid View Keeps Freezing)
- Description: Describe the problem and steps you've taken to try to troubleshoot it.
- Type: Most likely, General Inquiry or Performance can be selected.
- Product Family: Always select Media Software.
- Product Class: Enter your product name into the field.
  The product name should populate automatically once you begin typing, but if you have trouble, type "ALL" into the field and select a product from the list that appears.
- Impact: Always Medium. Imagine's Customer Support will change the impact if this is a critical issue.
- Urgency: Always Medium. Imagine's Customer Support will change the urgency if this is a critical issue.

  NOTE: **Changing the Impact and/or Urgency to create a High Impact and High Urgency case is not permitted by the system.** Leave those options as Medium, and for an urgent or critical case, submit your support case, then call us directly so we can assign it right away. You can find our contact phone numbers at https://imaginecommunications.com/contact/
- Reported Version: Enter your software version number.
- Reported End User Account: Call Letters or Group Name.

NOTE: Don't forget to upload any files that show a screenshot of the error(s) you're experiencing.

Reviewing and Updating Existing Cases

You can find your service case information and review case statuses.

These instructions also explain how to create a personalized version of the case list.

A case can have different statuses:

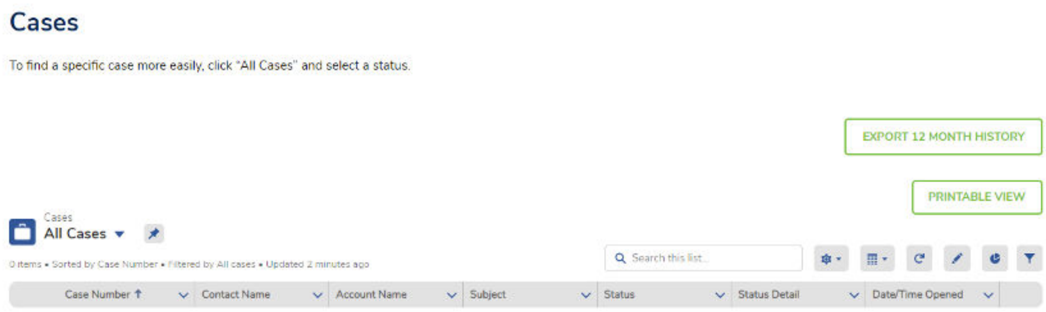
Status	Description
New	Case was entered and is pending Imagine Communications Engineer's assignment.
Open – In Progress	Case has an owner and is being investigated.
Open – Pending External Response	When the Imagine Communications Engineer is pending customer or third-party feedback (e.g., request for logs, additional info, test results, etc.)
Open – Pending Internal Response	The Engineer is waiting for internal Imagine Communications feedback (usually for pending development cases).
Open – Pending Parts Orders	Pending repair/exchange.
Resolved – Awaiting Customer Acceptance	Set when resolution is in place, case is about to be closed if acknowledged by

Status	Description
	the customer.
Resolved – Pending Administration	Waiting for our internal team to finalize any assets or contact information.

To review cases:

1. Open the Cases screen using one of the following:
   - By clicking Cases on the menu bar of the Customer Portal Home page.
   - By clicking the Cases icon on the Customer Portal Home page.

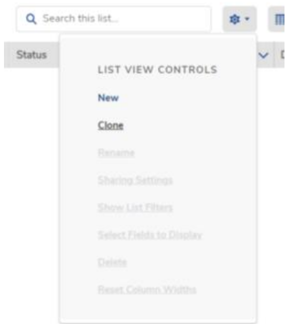
   This will open the Cases page. You can change what cases are displayed by click the arrow at the top of the list.

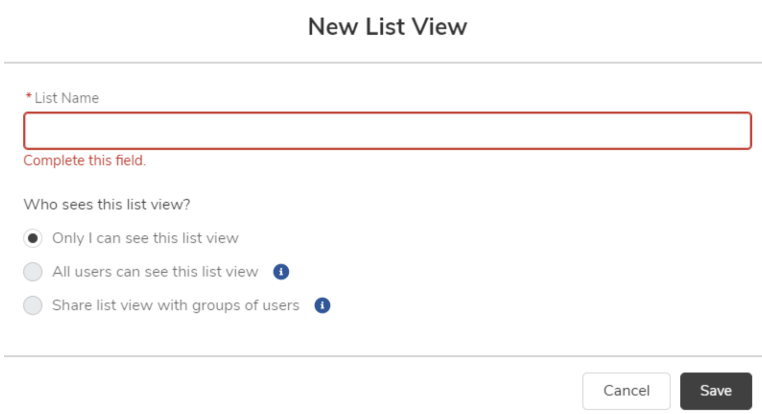
   The results on the screen default to "Recent Cases," but if you are new, you will not have any recent cases yet.
2. To see the details of a case, click the Case Number.
3. To update your case, you can do one of two things:
   - Post an update on the Case Feed.
   - Click Share or add a Case Comment by clicking New.
4. You also have full control over the way the list is displayed and works:
   - Export your 12-month history of cases: Click the Export 12-Month History button.
   - Printable View: Click to create a data view that is more readable for printing.
   - Create a new case: Click the New button.
   - View the table as a table or Kanban: Click the Display as Table button and select Table or Kanban.
   - Refresh the screen: Click the Refresh button.
   - Show charts related to the cases: Click the Show Charts button.
   - Filter grid results: Click the Filter button and select an option.

To create a personalized list view:

1. Start with New or choose an existing one that is close to what you want and select Clone.



Either the New List Continue or Clone List Continue screen appears, depending on which option you chose. The selections on the screens are the same.



2. In the List Name field, enter a name for the new or cloned list.
3. Select who sees this list view:
   - Only I can see this list view
   - All users can see this list view
   - Share list view with groups of users
4. When you are done making changes, click the Save button.
5. If you have a list view but you can't see all of the items you want to see, click the Filter icon to tell you what the list is showing you.

   In this case, it is set to:
   - Show only cases *I* own (filter by owner – my cases).
   - Show only cases that have a status equal to Open.
   - Show only cases that don't equal a type of Enhancement.

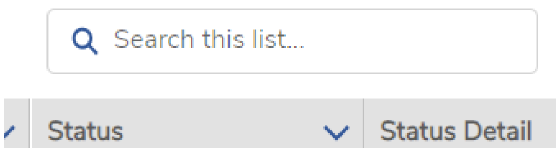
   The first problem in visibility for this one is the Status equals Open. This list only shows cases that are Status = Open and your comment that you can't see New/Resolved is explained by this behavior.
6. To fix it, click Status.
7. Under Value choose to include New and Resolved by clicking them.

   You can turn this backward, and with the Operator control choose Not Equal To Closed and Cancelled. That is generally the best option.
8. Click the Add Filter button to add filters or create fancy filter logic if you really want to get specific about what you see.

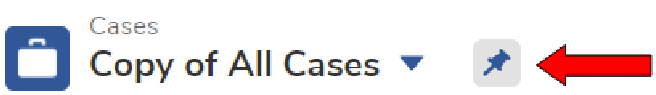
NOTE: If you add a filter on the field Case Record Type and set it as equal to “Service”, it will show you only Service Cases excluding Project cases and second. Because it is only showing one record type, many fields can be updated in the list view. You don’t have to click into the case to edit it.

9. If the field you want to edit isn’t on the list view, go back to the List Settings drop-down and choose Select Fields to Display.
10. From there you can choose any field from the case to display in the list view or choose to wrap long text fields instead of clip them with the down arrow on the column header by right-clicking and selecting Wrap Text or Clip Text from the drop-down menu.
11. Using the Search This List control you can quickly find something in a list you have open.

    It searches inside the subject/description.



12. To make sure your new list is open when you come back to Cases, pin it by clicking the pin button.



Return Material Authorization (RMA) Process

You can file and track the status of work orders placed through the RMA process.

After you file a case, if an Imagine Communications engineer deems it necessary to replace a product and it is covered under warranty or support, then an RMA process will be initiated.

Key points:

- If you believe you have a faulty item, please log a case with us.
- Once an Imagine Communications engineer deems an RMA necessary, we will request further details to process the RMA and request for a Returns (RMA) form to be completed. Once those details have been received, you will receive an RMA case number.
- If you are on a support contract, the replacement item will start the shipment process. If you are not on a support contract, we will ship the replacement upon receipt of the faulty item.
- Important: Please include the RMA number in your return shipment to us.
- If on contract, please ship the faulty item back to us within 30 days to avoid any additional charges. You will receive an electronic shipping label via email a few days after you have confirmed the issue is solved.

To file an RMA request:

1. Click the Create a Case button to request an RMA.

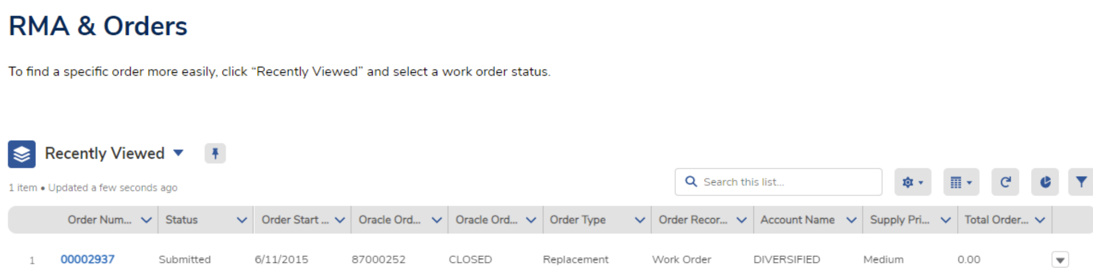
   Any RMA that is registered in the system can be reviewed through the Customer Portal as well. Please note that an RMA is always a sub-record of a case.

2. Fill in the form and click the Submit button, as explained in “Creating a New Case”.

To check the status of existing RMAs:

1. Open the RMAs screen using one of the following:
   - By clicking RMAs & Orders on the menu bar of the Customer Portal Home page.
   - By clicking the RMAs icon on the Customer Portal Home page.

   This will open the RMA and Orders page. You can change what RMAs are displayed by click the arrow at the top of the list.



2. From the drop-down list, select the type of RMA you’re looking for or use the search field to find it.
3. Click the Order Number link to view the RMA’s details:
4. If you open a record, the following information can be retrieved:
   - Line Type: “Exchange” is the defective part needs to be returned; “Replacement” means there’s no need to return the defective part.
   - Overall Line status: “CLOSED” means completed and invoiced; AWAITING RETURN means the return delivery has not been received or transacted.
   - Schedule Ship Date: The date we expect the goods to arrive in the regional hub.
   - Line Tracking Number/Waybill: The tracking number after the goods are actually shipped to the customer’s location.

Information on the Customer Portal

In the Customer Portal, the content includes the following categories under the Product Support main menu option:

- Advertising Management: Contains Knowledge Base articles for Imagine's advertising management products. Knowledge Base articles include resolutions to product issues filed through the Create a Case option, tips for easier product workflow, and configuration/support updates, as well as other information.
- Distribution: Contains Knowledge Base articles for Imagine's distribution products.
- Networking: Contains Knowledge Base articles for Imagine's networking products.
- Playout: Contains Knowledge Base articles for Imagine's playout products.
- Software and Firmware Downloads: Navigate through Imagine's product lines to find the latest downloads for your products.
- Documentation: Browse through the product lines to find user guides, release notes, and user documentation for your products.
- Service Alerts: Navigate through product lines for find fix updates, obsolescence notices, support announcements, and other timely alerts.
- More Topics: Lists all content topics within the Customer Portal.

Searching for Content

You can browse the Customer Portal's content, as well as find topics using the Search tool. The Search tool returns results for articles, cases, products, and RMAs. These instructions also tell you how to "follow" content so you can be notified if there are updates.

The search box at the top of the screen is the main field and it changes its scoped based on where and what you are looking at. Ultimately, though, it is an adaptive search, meaning that it does not pay attention to the old school rules such as AND/OR. It breaks things down into search keys and returns what it feels is most relevant to you based on the terms, it decides on its own to use AND or OR, and it evaluates how close together the words are in the article. It also considers your previous viewed articles so that it will improve over time as you continue to use the knowledge base. To understand more about the order of the results, read this Salesforce article. It does search inside PDFs and documents, but only ones that are specifically attached, and we generally do not attach documents.

Best Practices for Searching

Always

- Use the search quick preview.
- Use the search filters.
- Make searches as narrow or specific as possible.
- Use a keyword such as manual, documentation, user guide, release, or firmware along with the properly phrased product name.

- When using the topic categories, you can get down one level further by using the product names rather than specifically documentation or downloads. The product names also include the items for documentation and downloads.
- You can narrow down your search even further by using the topic categories in combination with the search box. Notice in the screenshot that it will let you search just within a topic.
- Search inside of topics. When using the topic categories, you can get down one level further by using the product names rather than specifically documentation or downloads. The product names also include the items for documentation and downloads.

When Searching for Downloads or Documentation Articles

- Spell the product name correctly (SelenioFlex not Selenio Flex)
- Leave out terms such as ADC which can generate too many search results
- Search for the correct spelling of product names.
  Example: If you're unable to find SelenioFlex File documentation:
  - You must search for the correct form of the name. The search was for Selenio Flex but SelenioFlex File is the correct Imagine name and how we use it in the Software & Firmware Downloads and Documentation articles in Salesforce. Because of how tokenization works, searching for "Selenio Flex File" will not return results for "SelenioFlex File".
  - The second problem with this example is we are not hosting SelenioFlex File documents on the Customer Community. We were only given 1 manual back in 2015. There is, however, a knowledge base article explaining how to find the documentation locally on your SelenioFlex File system itself.

NOTE: It is possible to fix some issues caused by tokenization by setting up synonyms in Salesforce. Please notify the Customer Community by filing a case or emailing portal@imaginecommunications.com if you find any issues.

Use Narrow or Specific Search Terms

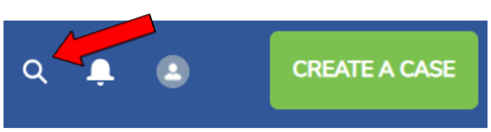
Example: Cannot find ADC releases.

- Make your search as specific as possible by including as much information as possible such as the release number (i.e., Air Client 4.27.29 Release).
- Search for specific ADC product names but do not include ADC in the search as it will return too many results.
- For Software and Firmware Release articles and for Documentation articles "ADC" has been removed from the article titles.

If there is any a time when you can't find something, reach out to portal@imaginecommunications.com so we can research and hopefully improve the situation.

To search for topics:

1. Use the Search tool by clicking the magnifying glass icon in the main menu bar.



The search field expands for entering text.

2. Type the name of what you are looking for into the search field, for example, ADC Media Client.

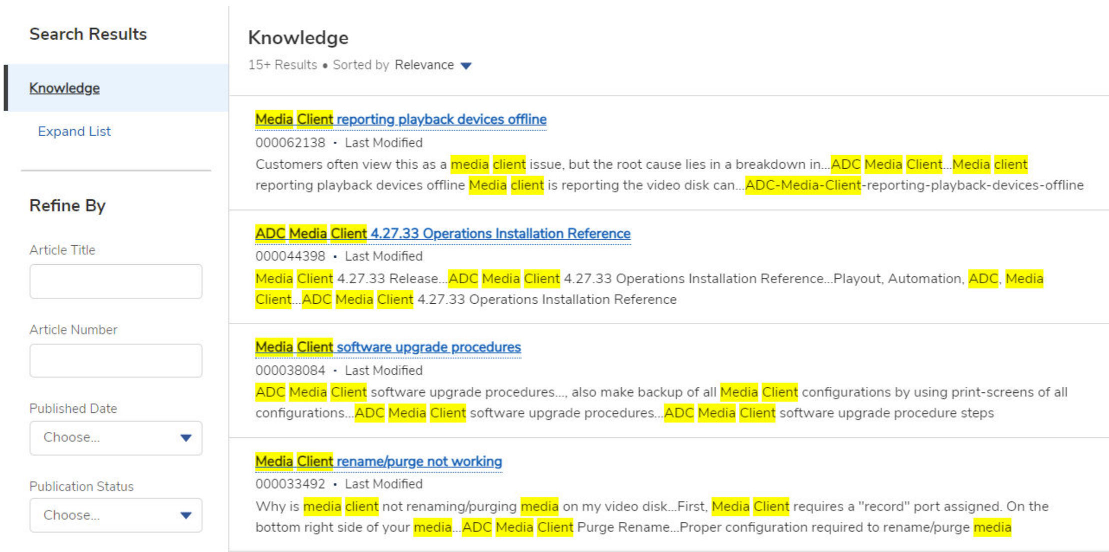
   Typing into the Search tool (but not clicking Search or pressing Enter) gives a quick-view of search result including Articles, Products, and Cases which you can click to go to that object.

3. You can narrow your search by being more specific, for example *ADC Media Client 4.26.69M Release and Documentation*.

   A preview list of articles or suggested topics will be generated as you type.

4. Click the topic to open the full list of suggestions.

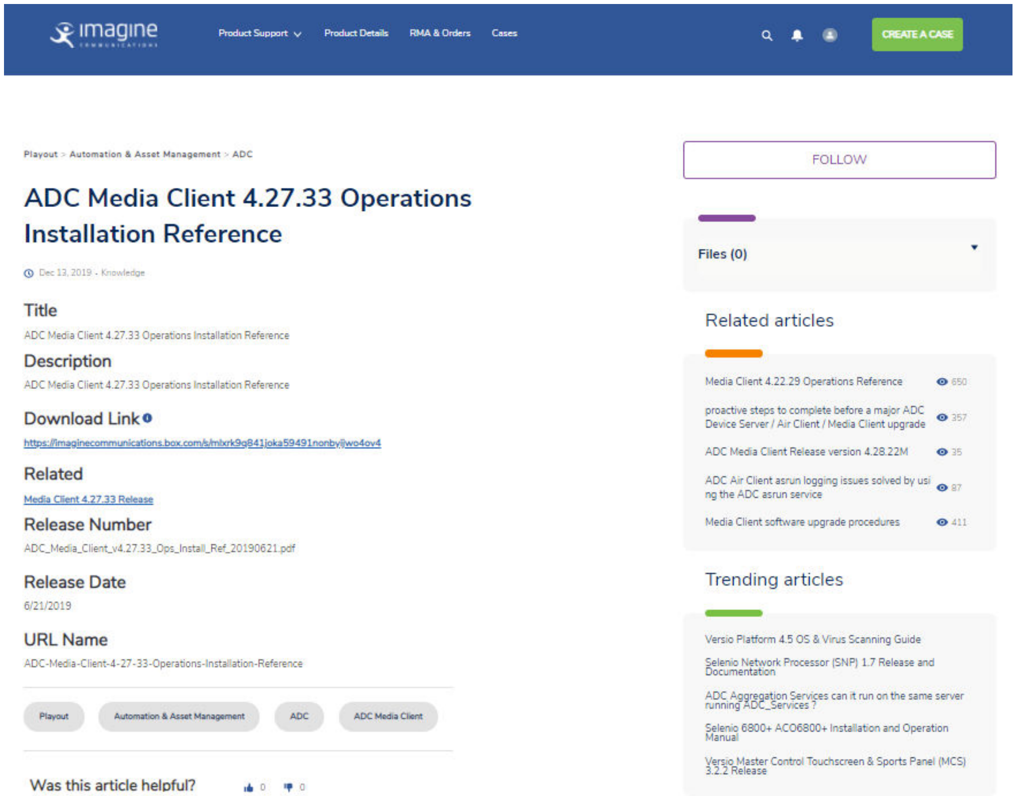
   If you don't see what you are looking for, click the Search button to open a larger list and access search result filters.



5. Click Articles on the Search Results filter on the left to narrow the search results.

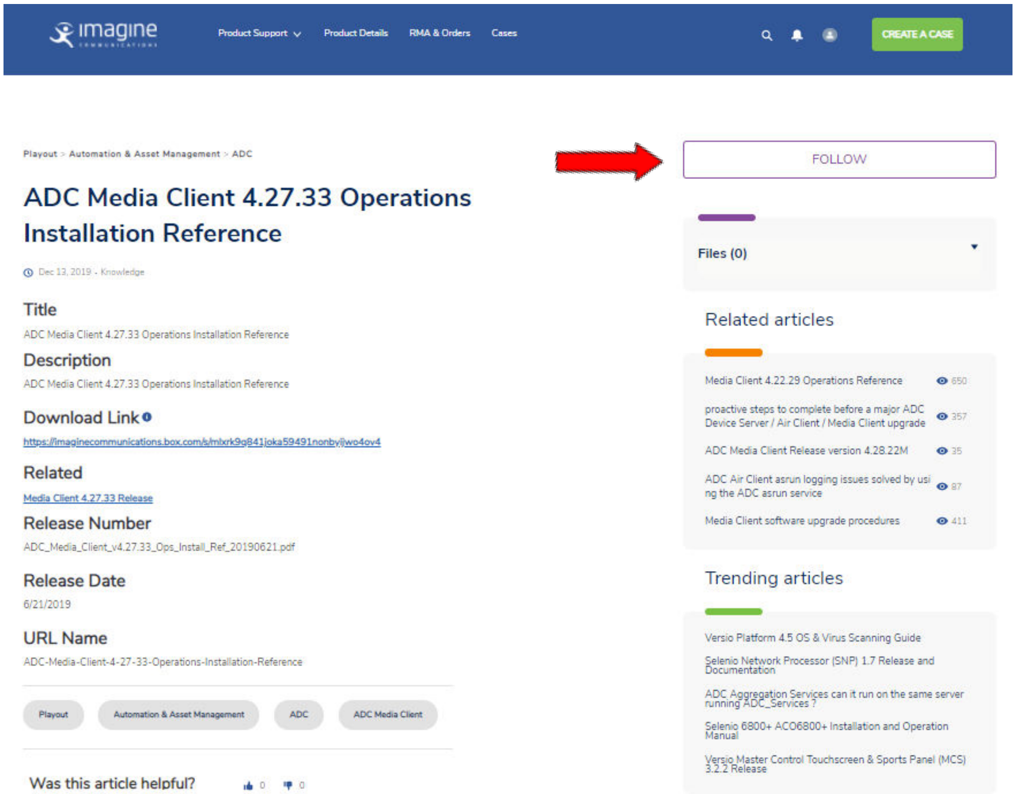
6. Click the name of the item you are looking for to open the article.

   The article's details page appears.

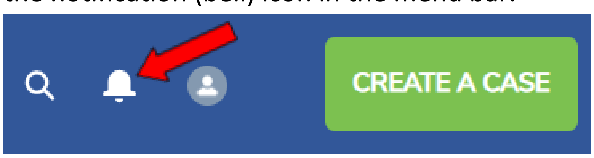


7. If there are files to download, click the Download Link to open an external folder where the files are kept.

8. Click a file to download it.
9. You can also choose to Follow the article to be notified if it is updated by clicking the Follow button.



10. If you "Follow" articles that have updates, you'll be notified of those updates with a number next to the notification (bell) icon in the menu bar.



11. To get your notifications, click the bell icon and a list appears.
12. If you have no notifications, a message appears to let you know there are none at this time.

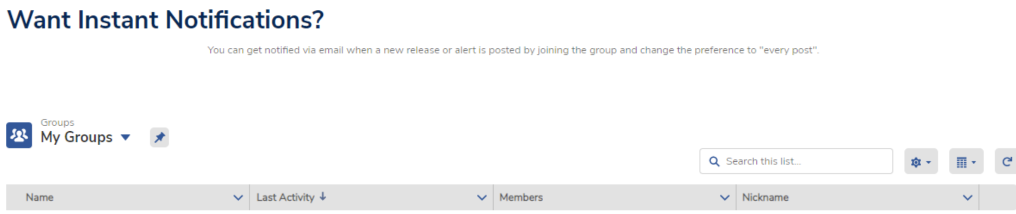
Joining Imagine Communities

When you receive your login for the Customer Portal, you join the Imagine Communications community of customers. As part of that, you can opt to join community groups made up of customers who also own the same products you own. Groups are notified automatically when updates related to the group are posted by Imagine staff. You can also opt to be notified as updates occur.

To receive product notifications:

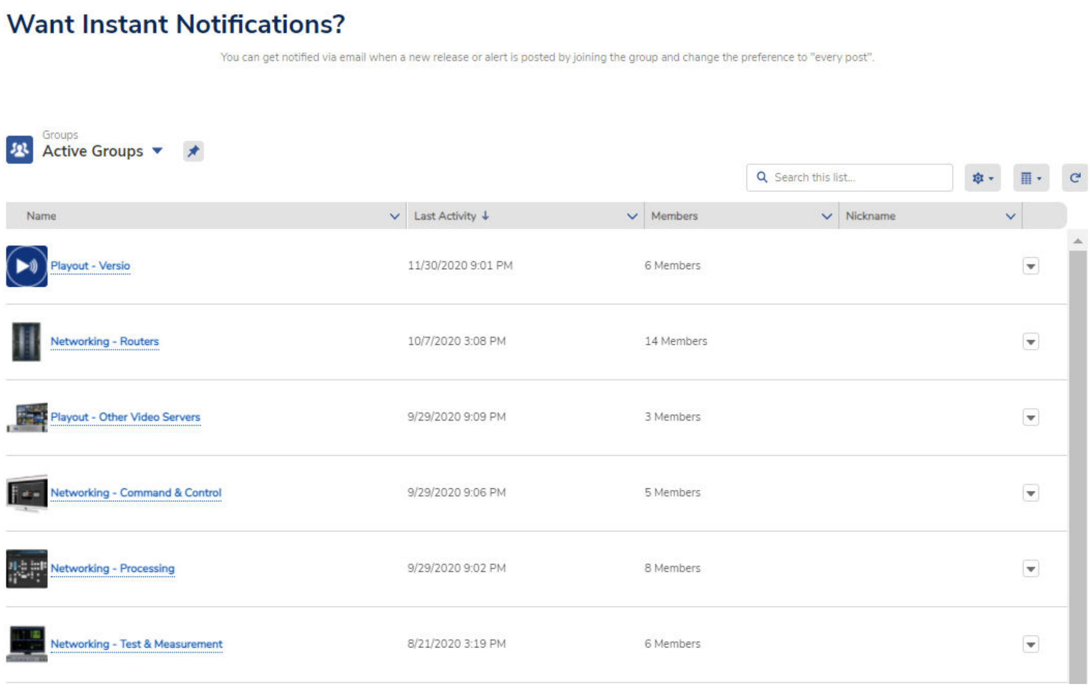
1. Click the Alerts icon.

   The Want Instant Notifications? screen appears.



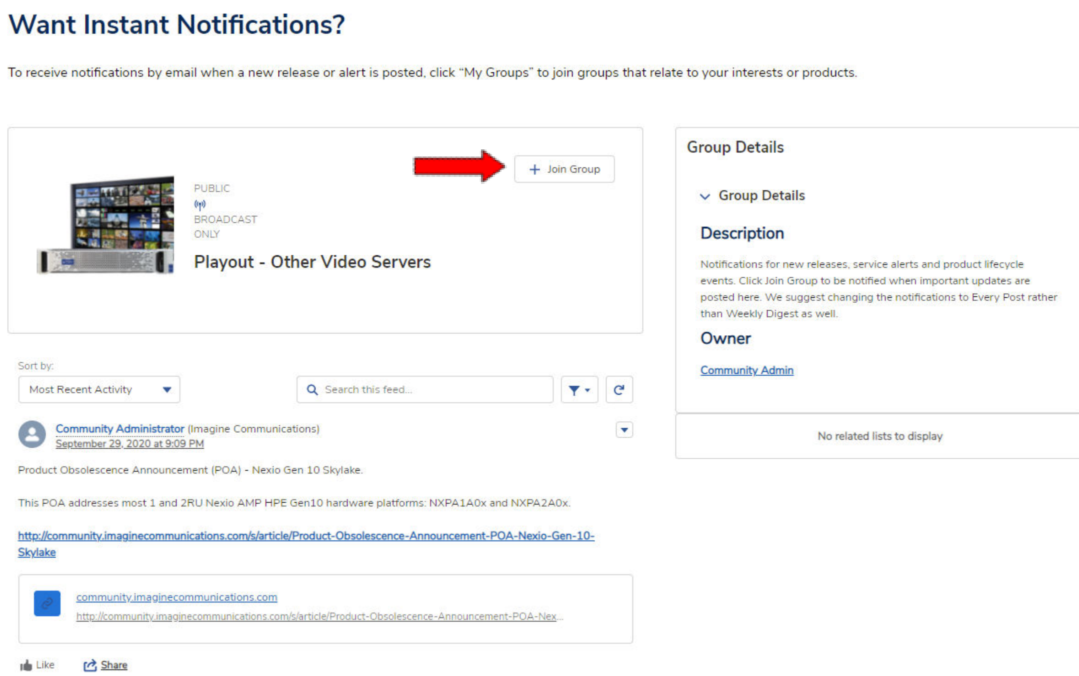
2. When you first go to the Product Notifications tab, use the drop-down arrow beside My Groups to switch it to Active Groups.

   This will give you the full list of available Notification Groups.



3. Hover your cursor over the group name link to see a description of the group.
4. To join the group, click the group name.

   The main page for that group appears, along with the discussion thread from the group's members (at the bottom of the screen).



5. Click the + Join Group button.

   The + Join Group button changes to a drop-down menu where you can select the frequency of notifications related to the group.

6. From the drop-down, select one of the following:
   - Every Post
   - Daily Digest
   - Weekly Digest
   - Limited

7. If you no longer wish to receive notifications, click the Member button.

   You have been removed from the group.

Requesting Access to APIs

NOTE: These instructions apply only to customer developers who need access to customer-facing APIs.

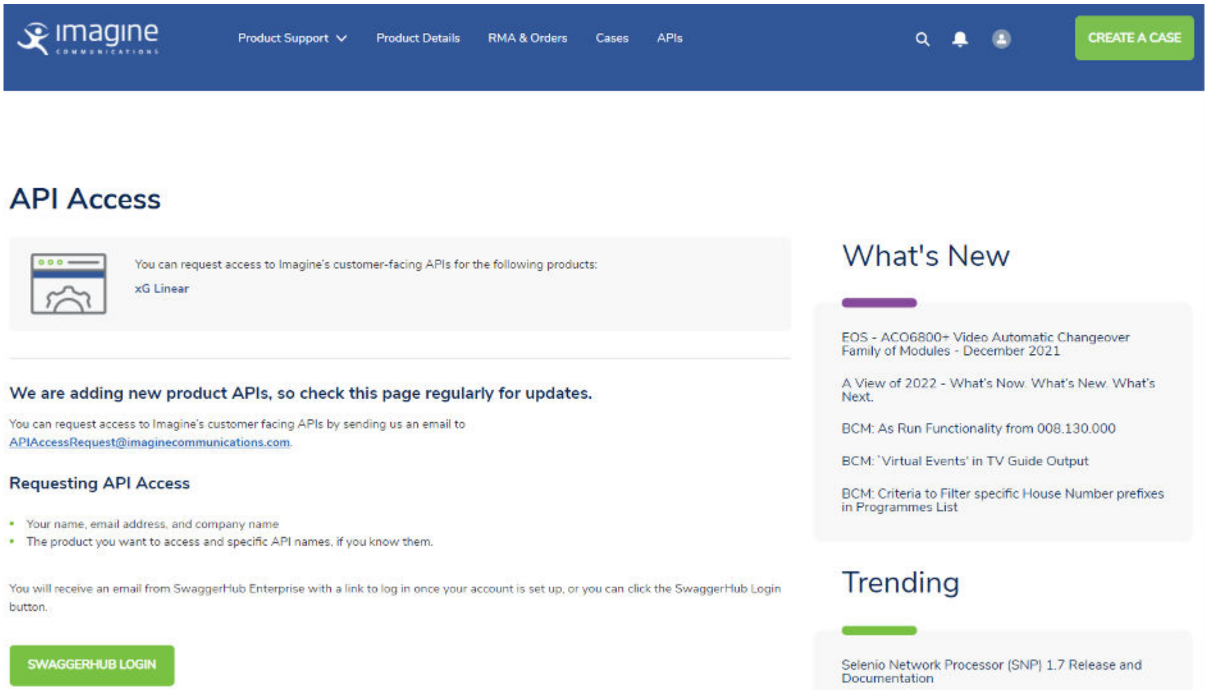
Imagine allows developers to access APIs in SwaggerHub Enterprise after requesting a login through the Customer Portal. APIs are built for specific Imagine products, so you'll need to know which product's APIs you want to access. You will also need to understand the SwaggerHub Enterprise interface, because we do not offer support for questions related to their software.

Please note that the list of products in SwaggerHub is growing, so check back to see what new product APIs exist.

To request access to Imagine APIs:

1. Click the APIs link in the blue header bar.

   The API Access screen appears. The gray box includes the list of products with SwaggerHub APIs.



2. To request a SwaggerHub login, click the APIAccessRequest@imaginecommunications.com email link.

   Your email service opens with a new draft email using the API Access Request email address.

3. Enter the following information:

   a. In the email's subject line, enter "API Access Request".

   b. In the body of the email, provide the following:

      - Your name, email address, and company name
      - The product you want to access and specific API names, if you know them.

   After you send the email, Imagine will verify your customer status and send you the email with your login credentials.

4. Once you receive your login credentials, you can log in one of two ways:

   - In the email you receive, click the Login link to enter your username and password.
   - Come back to the Customer Portal and click the green SwaggerHub Login button to go to the SwaggerHub website and enter your username and password.

NOTE: If you have difficulty with your SwaggerHub login, please use the Help information on the SwaggerHub screen or contact Imagine at APIAccessRequest@imaginecommunications.com and explain the problem you're having.

Troubleshooting

This section explains common problems and how to resolve them.

- *When you login nothing appears to happen, and the login screen appears again.*
  At the moment, the portals do not let you know that something went wrong with the login. Make sure you are using the email address you used to register for the portal and your password is correct. If you're sure the information is correct attempt to reset your password using the "Forgot Password?" link. If you don't receive an email in approximately 30 minutes, and the email is not in your spam email box, contact us at support@imaginecommunications.com for assistance.
- *Forgot your password?*
  Click the "Forgot Your Password?" link on the main page to reset your password. Make sure to use your correct username, which is the email address you signed up with. If you don't receive an email within 30 minutes, contact support@imaginecommunications.com for assistance.